Non-Catalog Form – OMR XEROX Monthly Base w/ Overage Charges

Non-Catalog Forms create an electronic requisition used to:

- Submit OMR Xerox monthly base maintenance and overage per copy maintenance charges to the vendor.
- You may submit all monthly base and overage per copy charges for a single vendor on one requisition.

1. On the *iBuy Homepage*, click the **Non-Catalog Form** link within the ***Showcased Services***

2. On the Non-Catalog Form, within the *Supplier Info* section, type the supplier's name in the **Enter Supplier** text box (note the auto-complete feature)
   - The supplier's name must be typed as it is in Banner; for an advanced search of suppliers:
     a. Click **supplier search** link
     b. Enter the supplier's name or a portion of the name
     c. Click **Search**; click **Select**

3. Within the *General Info* section, enter accurate information for:

   Catalog No. = Vendor's Master Contract #

   Product Description: Type in the following with a semicolon (;) and return after each line.
   - [Type of Equipment] **Monthly Base Charge**
   - **Month**: Month
   - [Type] **Make**: Make
   - [Type} **Model:** Model #
   - **SN#:** Serial #

   Quantity: 1
   Packaging: 1 **Drop Down:** should = EA-Each
   Estimated Price = Monthly Amount (from pricing chart)
   Commodity Code = 93900

4. YOU MUST KEEP TRACK OF THE NUMBER OF COPIES USED EACH MONTH BY TAKING A METER READ AT THE BEGINNING AND ENDING OF EACH MONTH.

   Calculate the number of copies used by subtracting your ending meter read from your beginning. If your number of copies used is OVER your allotted number of copies from the pricing chart, **continue to Step 5**. If your number of copies is NOT OVER your allotted number of copies from the pricing chart, **skip to number 7**.

5. Select "**Add to Cart**" from the **Available Actions drop down** and select **Go**.

6. Within the *General Info* section, update the information to:

   Product Description: Type in the following with a semicolon (;) and return after each line.
   - [Type of Equipment] **Monthly Meter Read**
   - **Meter Read Date:** MM/DD/YYYY
   - [Type] **Make**: Make
   - [Type] **Model**: Model #
   - **SN#**: Serial #
   - **Beg Meter Read**: Beg Meter Read
   - **End Meter Read**: End Meter Read

   Quantity: Number of copies OVER the allotted amount
   Packaging: 1 **Drop Down**: should = EA-Each
   Estimated Price = Rate per copy (from pricing chart)

7. Select "**Add and Go to Cart**" from the **Available Actions drop down** and select **Go**. (Adds the Form to the active Cart, closes the Form, and navigates to the active Cart).
8. Update the name of the Cart to identify the agreement, e.g., ***July 2010*** *[Type of Equipment]* ***Monthly Base and Overage Meter Read***.
9. Click ***Save***.

In the *workflow diagram*, click **Review** to review and edit the draft requisition

On the Requisition
- To edit *Requisition* information, select the **Edit** button in each section
- To edit by *line item* information, select the **View/edit by line item…**in each section; click the **Edit** button on individual line item

5a. To Edit Shipping Address:
1. Within the *Shipping* section, select **Edit** or **View/edit by line item…**
2. Choose the Shipping address:
   - **Select from profile values**: Click the drop-down; select code
   - **Select from Banner values**:
     Click the **from org address** link; type portion of *ship to* code or portion of address; click **Search**; click **Select**
3. Enter the *Ultimate Destination* in the **Location** text box
4. Click **Save**

5b. To Edit FOAPAL Codes: ALL OMR TRANSACTIONS USE **ACCOUNT CODE 147500**
1. Within the *Account Codes* section, select **Edit** or **View/edit by line item…**
2. Click **Select from profile values…** or **Select from all values…** and search by Value (200250-1), or Description (103 Indirect Cost Recovery), or a portion of either Value (200) or Description (Indi)
3. To split FOAPAL codes, click the **add split** link and repeat Step 1 above (for details, see the Split FOAPAL Codes Job Aid)
4. Click **Save**

5c. Notes and Attachments:
- *Internal Notes* and *Attachments* will stay in iBuy and can be shared between departments
- *External Notes* will go to Banner along with *Attachments* to the vendor

6. To complete the Requisition, click **Place Order** from the *workflow diagram*

7. *The Requisition Information screen appears, at this time you can do one of two things, write down the requisition # to copy for the next month or an easier option is to do the following each month:.*

- By the Requisition number, click "**View**" - This will open the requisition.
- Select **Copy to New Cart** from the *Available Actions/Options* drop down and select **GO.**
- This creates a new cart for the next month's meter read that can be updated for each meter read date and Beg/End meter read numbers and quantity.
- Naming your carts for each month's meter read, e.g., FY11 Copier Annul Maintenance Agreement, and SAVE is highly suggested for easy identification.

To populate for the current year's annual maintenance agreement:

- Click on your History tab
- Click on the My Requisitions sub-tab
- Find the Requisition titled with last year's annual maintenance agreement
- Click on the Requisition number - This will open the requisition.
- Select **Copy to New Cart** from the *Available Actions/Options* drop down and select **GO.**
- This creates a new cart for the new year's maintenance agreement that can be updated for each maintenance agreement period.
- Naming your carts for each year's maintenance agreement, e.g., FY11 Copier Maintenance Agreement, and SAVE is highly suggested for easy identification.

Repeat process for all lines.

Click Place Order

Business Manager – Helpful Hints:

- If your department needs to submit an annual maintenance agreement and the previous year's submitter isn't available, search for either the Requisition or Purchase Order Number in the "Quick Search" area.

- If using the Purchase Order – Click on the Requisition
- Click "**View**" in the Requisition Number Line

- Copy to a **New Cart** using the **Available Actions/Options** drop down
- Select **GO**

Anyone in the department is able to access the requisition and simply copy it to a new cart with all the information.

If the requisition or purchase order number isn't available:
- search using the employee's name in "History",
- Requisition History,
- By Requisition #,
- Click the "Filter" box,
- Choose a date range,
- Click "Select User" by the Prepared By,
- Search for your user,
- Select the user, Click Search,
- Select the correct requisition and copy to a new cart.