Non-Catalog Form – Monthly Copier Meter Reads

Non-Catalog Forms create an electronic requisition used to:
- Submit copier monthly meter reads to the vendor.
- You may submit all copier meter reads 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.
    - **Copier Monthly Meter Read**
    - **Meter Read**: MM/DD/YYYY
    - **Copier Make**: Make
    - **Copier Model**: Model #
    - **SN#:** Serial #
    - **Beg Meter Read**: Beg Meter Read
    - **End Meter Read**: End Meter Read

    Quantity: Calculate: End – Beg Meter Read = ####
    Packaging: 1 **Drop down:** should = EA-Each
    Estimated Price = Rate per copy (from pricing chart)
    Commodity Code = 93900

! If the copier also requires a color copy meter read or additional copier meter reads, go to the **Available Actions drop down** and select "***Add to Cart***" and click **Go**.

   - Update the appropriate information in the Product Description and Estimated Price fields.

4. Once all meter reads are added, Select "**Add and go to Cart**" from the **Available Actions drop down**.
5. Select **Go** (adds the Form to the active Cart, closes the Form, and navigates to the active Cart).
6. Update the name of the Cart to the current month's meter read, e.g., ***July 2010 Copier Meter Read***.
7. 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 <u>an easier option is to do the following each month</u>:.*

- Click on your History tab
- Click on the My Requisitions sub-tab
- Find the Requisition titled with last month's meter read
- 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 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., August 2010 Copier Meter Read and SAVE is highly suggested for easy identification.

To populate for the current month's meter read:

- Click on the "Form Attached" (Page) icon and update the Meter Read Date, Beginning and Ending Meter read numbers and quantity.   Remember: The Beginning Meter Read will be last month's ending meter read.
- Save should be the default and click GO
- Click CLOSE

Repeat process for all lines.

Click Place Order

<u>Business Manager – Helpful Hints</u>:

- If your department needs to submit a meter read and the current 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 you 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.