Create Non-Catalog Requisition Shopping List

This guide will cover:

- How to build and use shopping lists to simplify the requisition process for items purchased regularly which are not available in the Procurement Catalogs.
- Note: Items will remain in the shopping list for the foreseeable future which will enable the Requester to pick items as needed from the list for future Requisitions.

**Step One**

Navigate to the Requisitions area of WyoCloud.

- Upon signing in, the homepage will display. Click on the **Navigator** button (three horizontal lines) in the upper left corner.

- **Select Purchase Requisitions** under the Procurement header within the Navigator.
Step Two
Create Shopping List.

Prior to creating a non-catalog shopping list, you should first confirm the items are not available in the Procurement Catalogs. If it is, utilize the shopping list feature within the Procurement Catalogs. See Procurement Catalogs Quick Reference Guide for details.

- The **Purchase Requisitions** screen is displayed.

The first step to completing any requisition is to update your Requisition Preferences. For full details on how to complete this, see the Requisition Preferences Quick Reference Guide.

- To enter a non-catalog requisition, select **More Tasks** then **Request Noncatalog Item**.
From the Enter Requisition Line screen, first select the **Item Type** from the drop down.

- **Goods or services billed by amount**: most frequently services.
- **Goods or services billed by quantity**: when price is listed by quantity, price each and/or extended price.

The remaining options will adjust based upon the Item Type selected. If visible after selecting type, the following screen and table outline the fields required. Note: less fields appear when selecting Goods or services billed by amount.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Description</td>
<td>Description of item and purpose of the requisition.</td>
</tr>
<tr>
<td>Category Name</td>
<td>Procurement Categories may be typed into this field or use the grey search icon to use advanced search. For a full list of available Procurement Categories and descriptions, see the <a href="#">Procurement Services WyoGroup</a>.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Number of specific item you are purchasing.</td>
</tr>
<tr>
<td>UOM Name</td>
<td>Unit of Measure (most commonly each)</td>
</tr>
<tr>
<td>Price</td>
<td>Cost (if you select Each in UOM this is the price each)</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Supplier</td>
<td>Type the supplier name or use the gray search icon for advanced search.</td>
</tr>
<tr>
<td>Supplier Site</td>
<td>Drop down of available supplier sites.</td>
</tr>
</tbody>
</table>
In the Attachments area, attach any files which will be needed for all future requisitions containing this item. *Note: All Requisitions must have some type of attachment sent to the supplier indicating either services or goods to be provided. DO NOT ATTACH THE SAME ATTACHMENT MULTIPLE TIMES.*

- To attach, first select the plus sign (+) to add an attachment line.
- Use the Category drop down to identify who will need to see the attachment. Note: Internal to Requisition should be used for internal UW files (ie: Employee vs. Independent Contractor Form) and To Supplier should be used for files that the supplier will need a copy of (ie: quote, invoice, agreement). Only use one of these two options, others are not currently in use at UW.
- Include a Title and Description to easier identify what is attached.
- Note: Multiple files maybe attached by adding additional attachment lines using the plus sign (+).

Once all fields are complete, select Add to Shopping List in the upper right corner.

In the pop up window will be any shopping lists you have previously created. To add this item to one of these lists, simply click on the list and then Save and Close.

If you would like to create a new list, click on the plus sign (+) to add a list. Type what you’d like to name the list, then Save and Close.
The item has been added to your shopping list, click OK.

You can now either add additional items to shopping lists by remaining on the Create Noncatalog Request screen. Or select Done to return to the Purchase Requisitions screen.

Step Three
Viewing your shopping lists and adding items to requisitions.
- From the Purchase Requisitions screen, select **Shopping Lists** to view a list of all shopping lists you have created.
- To view items within a given shopping list, click the list name.
This brings you to the Shopping Lists screen for the list you selected. On this screen all items on the selected list can be viewed.

- You can toggle between created lists by selecting lists from the list on the left pane.
- To view details of a given item, click on the item name.

To add an item to a requisition, type the correct **quantity** under the item name then select the **shopping cart** icon.
You can see the item has been added to your cart by hovering over the cart icon in the upper right corner of the page. To submit the cart as a requisition, click **Review**.

This brings you to the Edit Requisition screen. From here you can update the **Billing** information and add **attachments** in the same manner as any other non-catalog requisition.

For more details on completing the requisition, see step three of the **Non-Catalog Requisition Quick Reference Guide**.

You have now completed the steps to Create a Non-Catalog Shopping List.