Create Non-Catalog Requisition

This guide will cover:

- How to use the requisition process to order goods and services not available via the Procurement Catalogs.
- Creating a requisition is the preferred method of ordering goods and services at the University of Wyoming. Once a requisition is created and approved it becomes a purchase order. The purchase order goes to the supplier, who then delivers the goods or services.

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
Add a requisition line
Prior to creating a non-catalog requisition, you should always first check to see if the item(s) are available in the Procurement Catalogs. See the 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 Enter Requisition Line.
From the Enter Requisition Line screen, first select the **Line Type** from the drop down.
- **Fixed Price Services**: when a service with a fixed price is purchased
- **Goods**: a physical item is being purchased
- **Services**: services that may have variable costs (i.e., billable hours)

The remaining options will adjust based upon the Line Type selected. If visible after selecting type, the following screen and table outline the fields required.
- Note: less fields appear when selecting Fixed Price Services or Services than Goods.
- Negotiated button must be selected on all requisitions.

<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>Do not change from USD. (If you need to pay in other denominations please contact the accounting office for instructions.)</td>
</tr>
</tbody>
</table>
Negotiated: Check the box (this will prompt a PO number to be assigned automatically after all approvals are completed)

Supplier: Type the supplier name or use the grey search icon for advanced search.

Supplier Site: Drop down of available supplier sites.

- In the Delivery area, confirm the Deliver-to Location reads as your department’s name (not building name). If it does not, you must update your requisition preferences prior to submitting the requisition. See Requisition Preferences Quick Reference Guide.

- Update the Billing section.
  - If paying by a grant, enter the Project Number and POET information. **The expense class must also be updated from the default (999) in the Charge Account field.**
  - If paying through a non-grant account, confirm the defaulted chart string in the Charge Account field. **The expense class must be updated from the default (999).**
  - Enter the total amount of the requisition line in the Amount field.

- If the funding needs to be split between multiple funding sources, use the split funding wishbone icon to add additional funding lines.
Upon completing all fields for the requisition line, click **Add to Cart** in the upper right corner.

You can see the item has been added to your cart by hovering over the **cart** icon in the upper right corner.

If you would like to enter additional requisition lines from the **same supplier**, simply complete step two again to add additional items to your cart.

If you would like to enter additional requisition lines from **different suppliers**, complete step two again to add additional items to your cart. Be sure to check the **Negotiation box on each line** so a separate PO number can be assigned to each supplier.
Step Three
Complete Requisition.

- From the cart preview, select **Review**.

This brings you to the Edit Requisition screen.

**Note:** All Requisitions must have some type of attachment sent to the supplier indicating either services or goods to be provided. Attachments must be a copy of the dually signed agreement, proposal or quote and the signed employee vs independent contractor worksheet. The agreement, proposal or quote is sent to the supplier while the employee vs independent contractor worksheet stays internal to UW. **DO NOT ATTACH THE SAME ATTACHMENT MULTIPLE TIMES OR THE PURCHASE ORDER WILL FAIL TO DISPATCH TO THE SUPPLIER.**
All attachments should be added in the **Notes and Attachments** section (below Billing).

- Click the plus sign (+) to add attachments.
- In this area, notes to the supplier can also be typed.

Use the Category drop down to identify if an attachment is to be sent to the supplier or kept internal to UW. Both To Supplier and Internal to Requisition can be used here. These are the only two types that should be used. The others are not applicable to UW.

- Select **To Supplier** in the drop down for items to be sent to the supplier (ie: price quote).
- Select **Internal to the Requisition** for items that are internal UW documentation, which the supplier does not need. *Documents attached here WILL NOT be sent to the supplier.*
- After attaching one attachment there is a + sign which can be used to add additional attachments.
- If you need to update any information on the Requisition Lines from this screen, **highlight the line to update**, then select the **pencil icon**.

- Information in the billing area can be updated by typing directly within the billing information, just as you did when initially entering.

- After confirming all information, select **Check Funds** in the upper right corner. Then select **OK** on the popup if funds passed.

   ![Confirmation](image)
If you are ready to submit the requisition, select **Submit** in the upper right corner.

- Note: You may also select Save or Save and Close (the drop down arrow by Save) to save and submit at a later time.

The system will bring you back to the main requisitions page and a confirmation pop up window will display. Within the confirmation window, you may note the requisition number and view a PDF summary of the requisition number if you choose.

The Requisition will now also show under your Recent Requisitions.

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