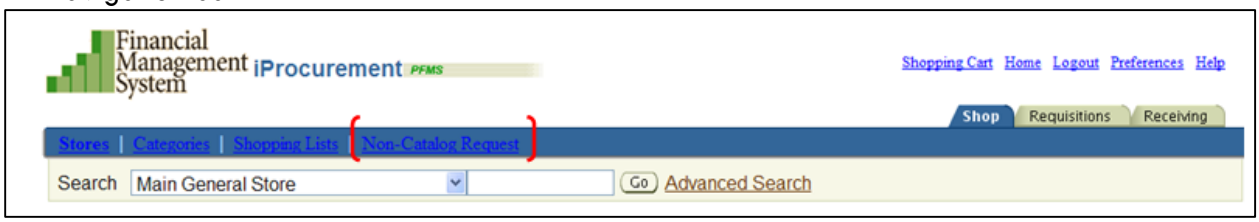
Non Catalog Request (NCR) for Instructional Materials, Books, Multimedia

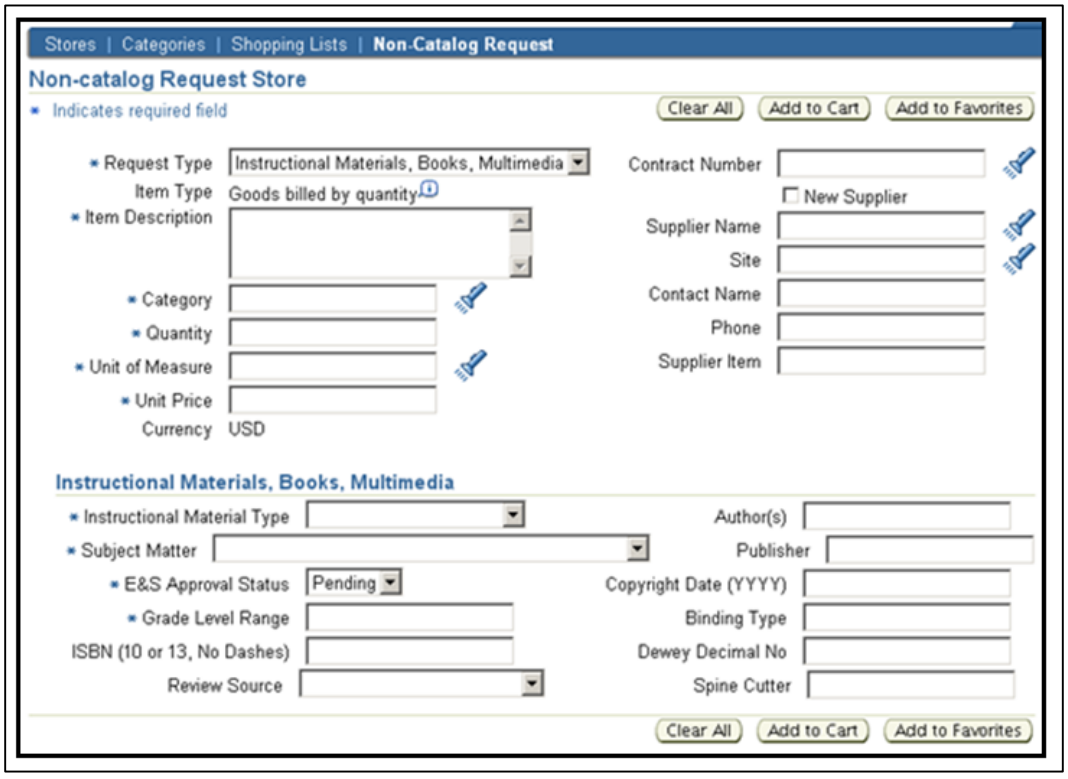
NOTE: The P-card is the preferred method of procurement for non-catalog purchase orders totaling less than $100.00. Therefore, the Procurement Unit has established $100 as the minimum order amount for non-catalog requests (NCRs). (See memo dated October 4, 2010).

1. Log into *iProcurement* and click on the **Non-Catalog Request** link shown in the blue horizontal navigation bar.



2. The Non-catalog Request Store page is displayed.

3. In the Request Type field, select Instructional Materials, Books, Multimedia.



4. In the Item *Description* field, provide a detailed description of the material being ordered to avoid delay in approval.

5. In the *Category* field, enter in a relevant category code. Refer to the ***Non-Catalog Request (NCR) Categories*** document for a list of suggested category codes that is posted on the link: **http://www.montgomeryschoolsmd.org/departments/procurement/pdf/NCR_Categories.pdf**

6. In the *Quantity* field, enter the quantity amount of the item being ordered.

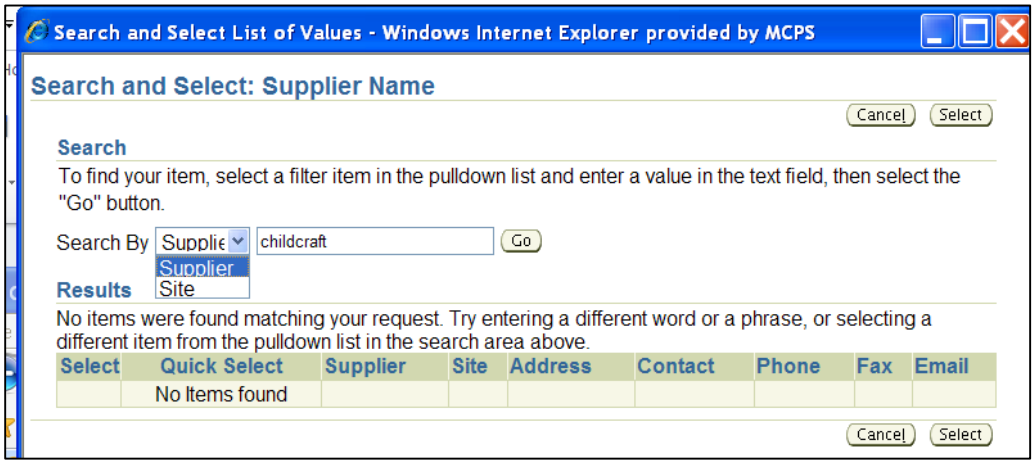
7. In the *Unit of Measure (UOM)* field, choose the appropriate measurement type by clicking the flashlight icon and type the % into the search field to see a list of all units of measure. Click on the **Quick Select** icon by the *UOM* for the item being ordered.

8. In the *Unit Price* field, enter in the price of the item being ordered. Do not use the dollar sign.

9. In the *Supplier Name* field, search for the supplier using the **flashlight** icon and then click the **Quick Select** icon across from supplier's name.

   * If no supplier was found perform one of the following:

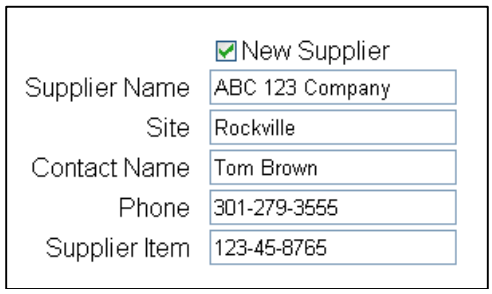
   a) If you have ordered from the supplier in the past, and have entered the name exactly as before, the supplier may have been updated by Accounts Payable and now appears as a site under its parent company. Perform a search using the site field to query by changing the *Search By* from **Supplier** to **Site**:



Use the Quick Select to choose the supplier:

b) If the supplier cannot be found, and you have not ordered from the supplier before:

- Check the box **New Supplier.**
- Enter the *Supplier Name, Site, Contact Name, Phone and Supplier Item* number (if applicable).



NOTE: Complete supplier information must be provided during Step 2 of the Checkout process as described in Paragraph 4**c** that follows to avoid delay of processing the order.

10. In the *Instructional Material Type* field, use the Drop Down arrow to select the material type being ordered.

11. In the *Subject Matter* field, use the Drop Down arrow to select the subject matter type being ordered.

12. In the E&S *Approval Status* field, leave the default **Pending**.

13. In the *Grade Level Range* field, enter an appropriate grade level range (ex: K-2, 3-5, 6-8).

14. While it is not required to enter data into the other remaining fields not marked with an asterisk (*), any additional known information will help to expedite your order.

    Best Practice: If the ISBN number is known enter it in the *ISBN#* field to expedite the approval process.

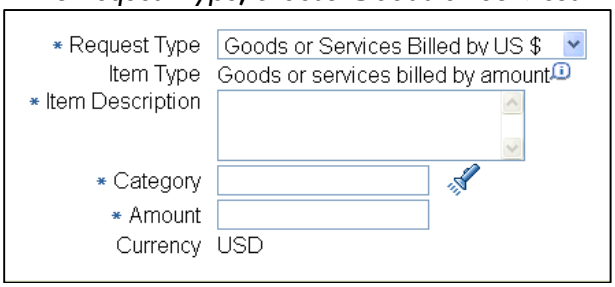
15. Click the **Add to Cart** button.

16. To add additional NCR items into the cart, repeat steps 4-8 and 10-14

    Best Practice: Only items from the same supplier with the same category should be combined into the same requisition. Do not combine items available in *iProcurement* for ordering with NCR items, even if it is the same supplier.

17. If the shipping and handling costs are known for the items being ordered, add the cost as an additional requisition line as follows:

- In the *Request Type*, choose Goods or Services Billed by US $



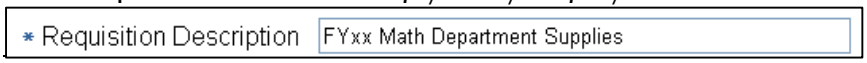
- In the Item Description field, enter "Shipping and Handling".
- In the Category field, enter the same category code that was used to order the item(s) on the requisition.
- In the Amount field, enter the amount of the shipping and handling charges (ex: 5.95).
- Click the **Add to Cart** button to add the shipping and handling cost line to the requisition as an additional line item.

18. Proceed to *Checkout*.

Checkout Instructions Non Catalog Requests

Checkout Step 1

1. In the *Requisition Description* field type in a relevant standard description for your order beginning with the fiscal year that the items are being purchased for. If the items being purchased are for *Early Ordering*, be sure to enter the new fiscal year in your description. An example follows: *FY**xx** - Dept/Class/Subject/Office - General Description*

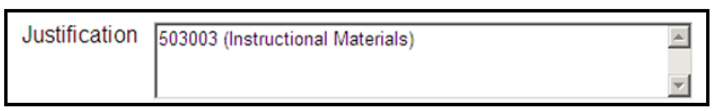


2. In the *GL Date* field, the default is the current date. If your order pertains to *Early Ordering*, change the *GL Date* to **July 1st** to place the encumbrance in the new fiscal year.

3. Click the **Next** button to proceed to *Checkout Step 2*.

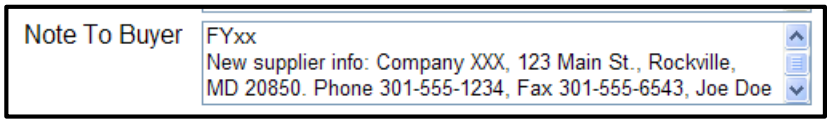
Checkout Step 2

4a. In the *Justification* field type the 6-digit account number that is being charged for this requisition, along with a description of the account, i.e.: instructional materials, textbooks, media. This will enable the account approver to verify that the requisition was charged to the correct account.



4b. In the *Note to Buyer* field enter any additional information that will help the buyer to process your requisition, including if there are attachments. If your order pertains to *Early Ordering*, enter the new fiscal school year in this field, even if you have no other information to communicate to inform the buyer to process the requisition in the new fiscal year. An example follows of an order for *Early Ordering* with a new supplier in Step 4c.

4c. If the NCR items are to a new supplier, provide the supplier's complete information in the *Note to Buyer* field, to include Company name, Contact, Street address, City, State, Zip code, Phone, Fax and/or Email (if available).



Add an Attachment:

Add an attachment to the requisition if important information and/or instructions need to be communicated regarding the order. Inform the approver and/or buyer of the attachment in the *Justification* field and/or the *Note to Buyer* field when performing the checkout process.

Attachments can be a File, URL or Text message and can be communicated to an approver, buyer, receiver or supplier. For detailed information on this process click on the following link:

http://www.montgomeryschoolsmd.org/departments/procurement/pdf/Adding_An_Attachment_To_A_Requisition_During_Checkout.pdf

Checkout Step 3

Review your requisition and click the **Submit** button.