



## Non Catalog Request (NCR) for Goods & Items

**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.

Financial Management System iProcurement PFMS

Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving

Stores Categories Shopping Lists **Non-Catalog Request**

Search Main General Store Go Advanced Search

2. The Non-catalog Request Store page is displayed.
3. In the Request Type field, select **Goods and Items**.

Non-catalog Request Store

\* Indicates required field

Clear All Add to Cart Add to Favorites

\* Request Type Goods and Items

Item Type Goods billed by quantity

\* Item Description

\* Category

\* Quantity

\* Unit of Measure

\* Unit Price

Currency USD

Contract Number

New Supplier

Supplier Name

Site

Contact Name

Phone

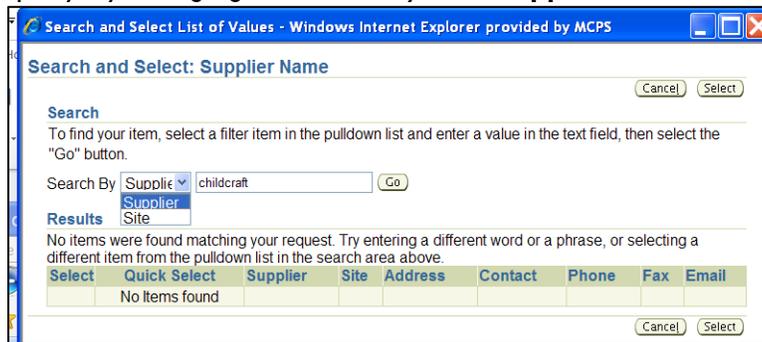
Supplier Item

Clear All Add to Cart Add to Favorites

4. In the *Item Description* field, provide a detailed description. Include a Brand and/or Model #, color, etc. if applicable.
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](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).

	<input checked="" type="checkbox"/> New Supplier
Supplier Name	ABC 123 Company
Site	Rockville
Contact Name	Tom Brown
Phone	301-279-3555
Supplier Item	123-45-8765



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

10. Click the **Add to Cart** button.
11. To add additional NCR items into the cart, repeat steps 4-8 and 10

**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.

12. 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 \$

The screenshot shows a requisition form with the following fields and values:

- \* Request Type: Goods or Services Billed by US \$ (dropdown menu)
- Item Type: Goods or services billed by amount (dropdown menu)
- \* Item Description: (empty text box)
- \* Category: (empty text box)
- \* Amount: (empty text box)
- Currency: USD

- 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.

13. 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: *FYxx - Dept/Class/Subject/Office - General Description*

The screenshot shows the following text in a text box:

\* Requisition Description: FYxx Math Department Supplies

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 1<sup>st</sup>** 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.

Justification	503003 (Instructional Materials)
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- 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).

Note To Buyer	FYxx New supplier info: Company XXX, 123 Main St., Rockville, MD 20850. Phone 301-555-1234, Fax 301-555-6543, Joe Doe
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## **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](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.