



Procurement

Oracle Procurement Step-by-Step Guide

Request a Non-Catalog Item via ServiceNow

January 29, 2021

FINAL

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The Non-Catalog Item Requisition Process Overview

It is important that you understand the policies and restrictions around what goods and services can be purchased by the campus and how these goods and services can be procured.

Sourcing goods and services: The University conducts a significant amount of strategic sourcing to ensure that goods and services required by the campus can be obtained through an existing contract and preferable through a catalog purchase in order to streamline and expedite procurement to the greatest extent possible. Therefore, most of the goods and an occasional service required by the campus are available to be easily procured through the catalogs you have been trained on in this course.

Additional guidance on ordering: If you need further guidance before ordering through a catalog or submitting a ServiceNow request for a good or service not available through a catalog then please reference the ***Requester and Requisition Preparer Quick Reference Guide*** for more information.

In Bobcat Buy, there are specific catalogs from which UC Merced requisitioners can shop. The main catalogs are punchout catalogs.

- **Hosted Catalog:** is a catalog of products and services selected and contracted by UC Merced with suppliers. It allows requisitioners to search for products and services from hosted catalogs directly in the Bobcat Buy interface. **This functionality will be available in the near future.**
- **Punchout Catalog:** is a catalog in Bobcat Buy that is interfaced with a supplier's online marketplace outside of Bobcat Buy. Ex. Dell
- **Non-Catalog via Bobcat Buy:** is **only available to the UC Merced CBS2 team.**
- **Campus requisitioners** requiring **non-catalog** items **should submit a ServiceNow ticket** which will be processed by CBS2.

Once a requisition is submitted, the system determines the approval workflow based on the details of the requisition. The following represents the requisition approval workflow process. The requisition first routes to the department approver if the requestor's department has opted into department approval. If the requisition received department approval, the requisition routes to the fiscal approver. Only one fiscal approver is assigned to the requisition based on the requisition amount and department. If the requisition is approved by the fiscal approver, and if the purchase includes a restricted commodity, the requisition will route to the restricted commodity approver for final approval. There are three levels of approval that may be required on any given requisition. Additionally, any Approver can add an Ad Hoc approver to the workflow.

- **Department Approver:** Department approvers are assigned as needed by the department and are assigned at the department level. If a department approver is

not required by the department, the requisition will not stop for review at this level. Department approvers are generally assigned by a department to assist in obtaining additional approvers or providing any additional review or documentation that the department determines is necessary to be attached to the requisition.

- **Fiscal Approver:** The fiscal approver is assigned by the Division Head and is ultimately responsible for ensuring that requisitions are approved in compliance with applicable regulations, policies, rules and guidance or are otherwise denied. Fiscal approvers may be assigned to standardized dollar values for each department by the division head.
- **Restricted Commodity Approver:** Restricted commodity approvers range from EH&S personnel responsible for managing controlled substances to Live Animal approval. Restricted commodity approvers are assigned to requisition workflow approval to assist them with managing the areas of responsibility placed on them through regulations, policy, delegations or University Procedures where they are responsible for approving certain procurement transactions.

Create a ServiceNow Request to Requisition Non-Catalog Item(s)

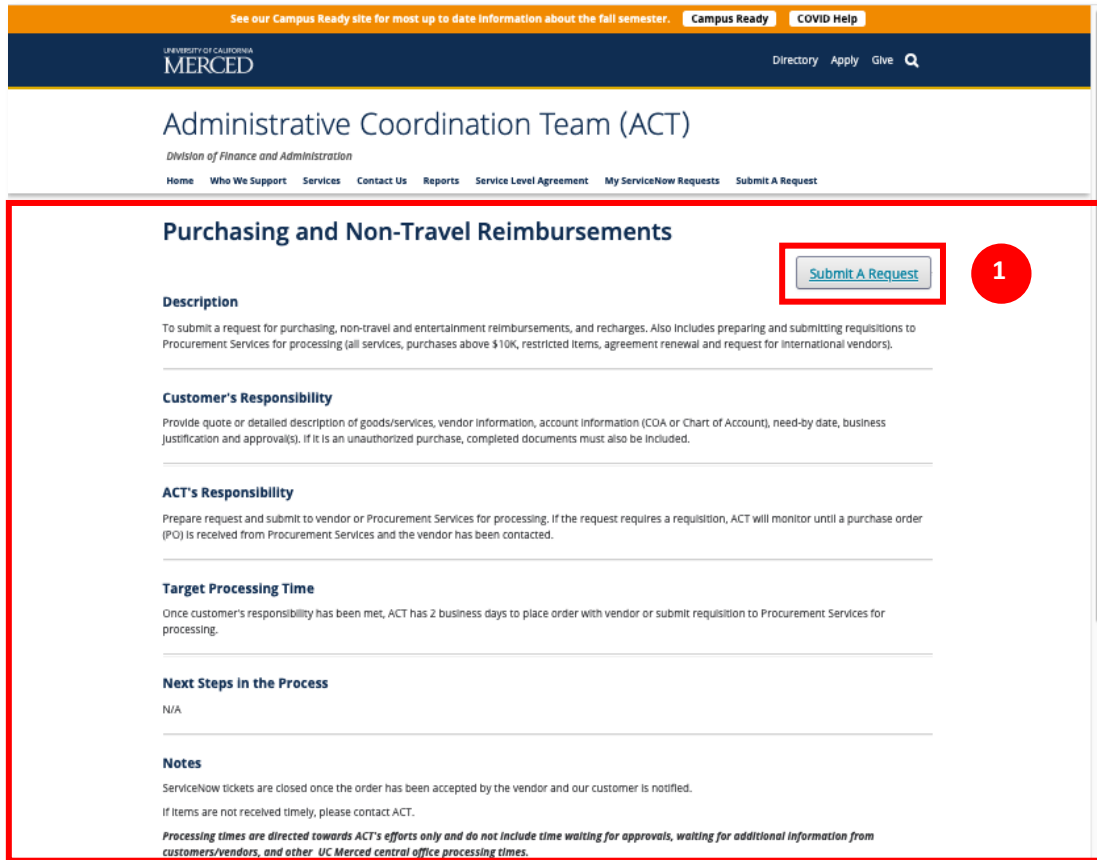
UC Merced's **Campus Users** will use these steps to create a **ServiceNow** ticket to request Non-Catalog item(s) both **with** or **without** a project assignment – including needs for R&D goods/ services.

- **Non-Catalog via Bobcat Buy:** is **only available to the UC Merced CBS2** team
- **Campus requisitioners** requiring non-catalog items **should submit a ServiceNow ticket** which will be processed by **CBS2**.
 - **Non-catalog item** examples: consulting services, auto detailing, custom lab equipment from an existing quote, or any good or service that cannot be found in an existing catalog

To perform this task go to the **Purchasing and Non-Travel Reimbursements** page in **ServiceNow** via the URL link below:

<https://act.ucmerced.edu/general-purchasing>

1. In the **Purchasing and Non-Travel Reimbursements** page, click the **Submit a Request** button



2. In the **Requestor Information** section of the **CBS2 – General Purchasing** page, enter the following information as required (***mandatory** data fields are indicated by an asterisk):
 - a. ***Requested By:** defaults to value of the name of who is logged in
 - b. ***Contact Number:** enter the value
 - c. **Department Number:** enter the value
 - d. **Department:** enter the desired value, or select the value using the search feature if needed
 - e. **Requested on Behalf Of (optional):** enter the desired value, or select the value using the search feature if needed
 - f. **Click here to add additional update notification recipients:** add more recipients if more people need to be kept updated on this request
 - g. ***Short Request Description:** enter a description for this request
 - h. ***Purpose/ Business Justification for request:** enter a purpose/ business justification for this request if needed
 - i. ***Is this Covid-related:** select the desired value from the drop-down menu

Service Catalog > Financial Requests > CBS2 - General Purchasing

CBS2 - General Purchasing

Select this request to purchase supplies, equipment or services.

Submit

Requestor Information

* Requested By: Michelle Taylor

* Contact Number:

Department Number:

Department:

Requested On Behalf Of (optional):

Click here to add additional update notification recipients

* Short Request Description

* Purpose / Business Justification for request

* Is this Covid-related? -- None --

- j. **Vendor for this Order:** enter the preferred vendor for this order if there is an existing vendor
- k. **Enter Line Items here (Item #, Description, Vendor, Unit Price, & Quantity). If it is a large order, upload documents that describe the items:** enter detail information respective of the goods/ services being requested
 - i. **Item #**
 - ii. **Description**
 - iii. **Preferred Vendor**
 - iv. **Unit Price**
 - v. **Quantity**
 - vi. **Need by Date**
- l. **Please include any URL links for additional information on the items requested:** include URL links to provide additional information to be helpful where possible
- m. ***Estimated Total Purchase Amount:** enter estimated total for this request

- n. **Is this an Emergency Order? (An emergency situation is defined as a situation where the lack of materials or services may cause the cessation of an educational program/research project or injury of personnel.):** select the desired value from the drop-down menu if different from the default value
- o. **What is the Shipping Location:** select the desired value by clicking the corresponding radio button if different from the default value
- p. **Chart String Charge Type:** select the desired value from the drop-down menu if different from the default value
- q. ***Add Chart String/ Project Name (Type Unknown if you do not know the Chart String):** CBS2 will get back to you with additional questions if the value is unknown. Enter the desired value, or select the chart string segment values using the search and select feature for each chart string segment value if needed.

Note: you can use the “Enter a CoA Chartstring or Project Details POET POETAF_Step By Step Guide.pdf” for more detailed instruction on using the search and select feature to enter chart string segment values if needed.

NOTE: One Vendor per ticket. If you have multiple vendors, please open a separate ticket for each vendor.

Vendor for this Order

Enter Line Items here (Item #, Description, Vendor, Unit Price, & Quantity). If it is a large order, upload documents that describe the items.

Please include any URL links for additional information on the items requested

* Estimated Total Purchase Amount

Is this an Emergency Order? (An emergency situation is defined as a situation where the lack of materials or services may cause the cessation of an educational program/research project or injury of personnel.)

What is the Shipping Location?
 Campus Castle Fresno Other

Chart String Charge Type

* Add Chart String/Project Name (Type Unknown If you do not know the Chart String)

- r. **Shipping Method:** select the desired value by clicking the corresponding radio button if different from the default value

- s. **Is this a Change Order:** select the desired value from the drop-down menu if different from the default value
- t. **Is this a Request for Fabrication:** select the desired value from the drop-down menu if different from the default value
- u. **Additional Comments:** enter any additional information related to this non-catalog item requisition request as needed
- v. **Attach relevant documents:** attach any supporting information related to this non-catalog item requisition request as needed

3. Click the **Submit Request** button

Shipping Method

Overnight (Additional Charges May Apply) **2r-v**

Two Day (Additional Charges May Apply)

Standard

Is this a Change Order?

No

Is this Request for a Fabrication?

► More information

No

Additional Comments

Attach relevant documents

Use the paperclip to attach any relevant documents or forms

Submit Request **3**

4. In the **Thank you...** window, click the 'x' icon to complete this process

Thank you, your request has been submitted

Order Placed: 01-13-2021 12:55:58 PM

Number	Requested Service	Stage
RITM0160550	CBS2 - General Purchasing	►

x **4**