

EPIC – Creating a Non Catalog Request

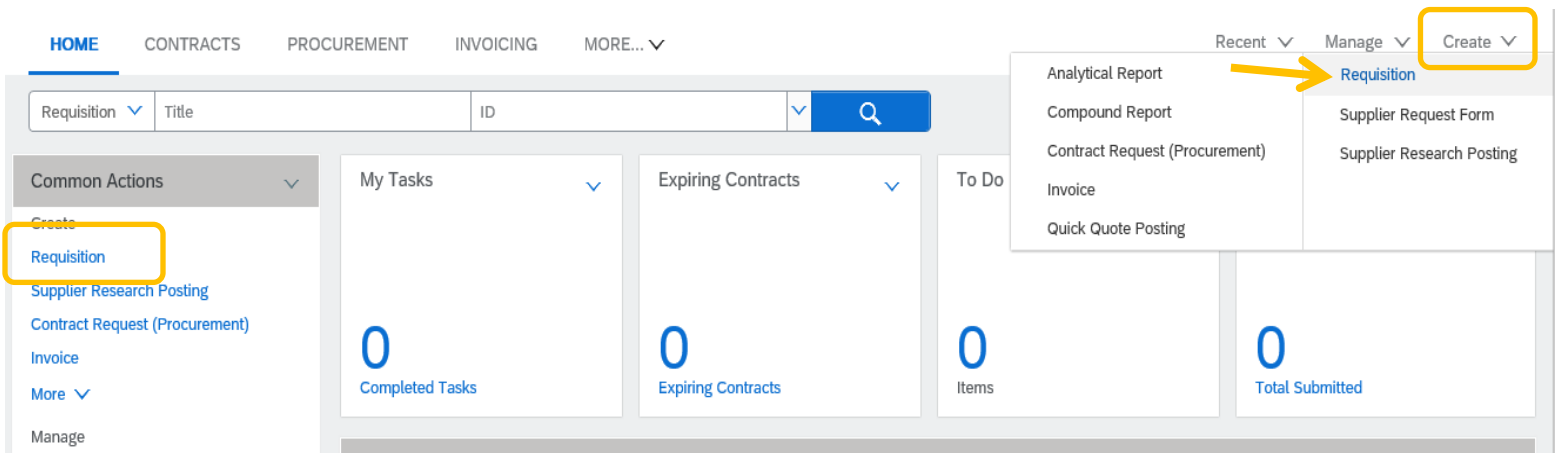
This guide has been prepared for you to provide a step-by-step instruction on the Non-Catalog request process in EPIC.

Before you begin creating a Non-Catalog Requisition, we recommend you speak with the supplier to request a quote. This will ensure you have accurate information to enter in your purchase request and will avoid unnecessary invoice reconciliations.

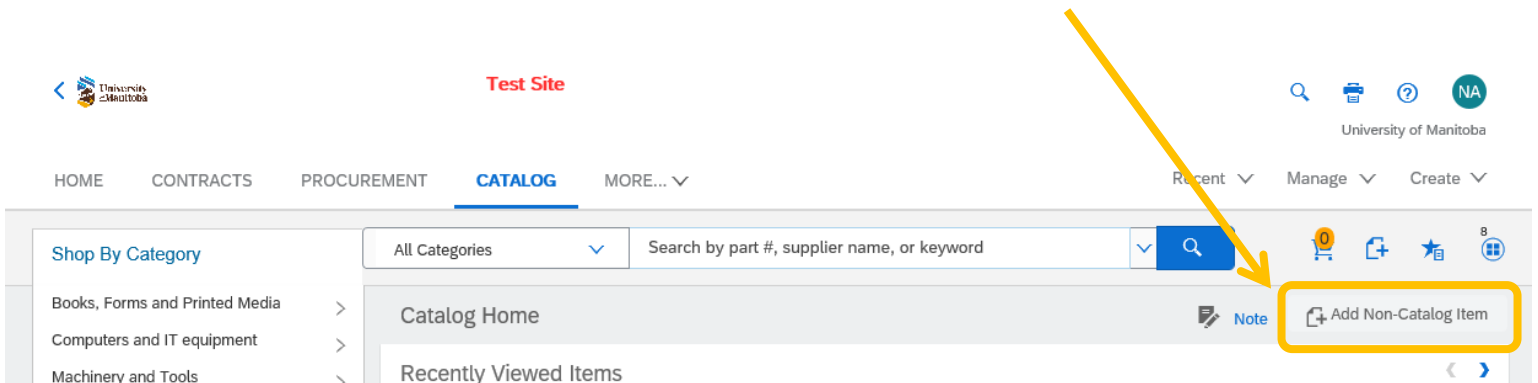
Note: If you are purchasing any items containing radioisotopes, there are specific approvals required to meet regulatory requirements. Please refer to the [guide](#) prepared by EHSO for further information on this process.

Creating a Non-Catalog Request

- 1) Select **Requisition** to create a Non-Catalog Request. This can be accessed either in the Common Actions box or the Create drop down menu.



- 2) You will be redirected to the Catalog tab. Select **Add Non-Catalog Item**.



3) The Create Non-Catalog Item form will open.

The following fields are required to be filled:

- Full Description (A description of the item or service)
- Commodity Code**
- Quantity
- Unit of Measure
- Price
- Currency
- Supplier

Optional fields:

If you have been provided this information, include it in the form however it is not necessary.

- Supplier Part Number
- Supplier Auxiliary Part ID

***When searching for a commodity code, begin by searching for a general description of the item. If you obtain a long list of results refine the description further. You may not find the exact title of the item you are purchasing however selecting a commodity code in close relation is sufficient.*

Create Non-Catalog Item

Full Description: *

Commodity Code: * (no value) ▾

Account Type: * (no value) ▾

Quantity:

Unit of Measure: each ▾

Price: * \$0.0000 CAD ▾

Additional Pricing Details ⓘ

Amount: \$0.0000 CAD

Supplier Information

Supplier: (No Preference) ▾

Contact: (no value) [select]

Supplier Part Number:

Supplier Auxiliary Part ID:

Once all required information is complete, select **Add to Cart**.

4) You will be returned to the Catalog tab with confirmation that the item has been added to your requisition.

PR54408

✓ This item has been recently added

Repeat step 2 and 3 to add another Non-Catalog Item or select **Proceed to Checkout** to move to the next step in processing your request.

5) You will be brought to the Summary page of your requisition to finalize the request you have created.

a) The following fields are required to be filled:

- Title: Brief description of your request.
- Ship to: Delivery location.
- Deliver To: Name the order should be addressed to when shipping.
- Need-by Date: The date you need your item but also the time frame given for approvals to be completed.

PR343611:

Summary

Title: *

Purchasing Unit: umanitoba

On Behalf Of: Natasha Ann Martin ▾

Buyer: (no value) ▾

F.O.B Shipping Instructions: (no value) ▾

shipping instructions:

My Labels: Apply Label... ⓘ

Ship To: * (no value) ▾

Deliver To: * Natasha Ann Martin

Need-by Date: * ⓘ

b) Optional fields:

- Comments: If you have a quote include a comment stating "Please see attached quote" and click on the checkbox for Visible to Supplier.
- Add Attachment:
 - Click on **Add Attachment**.
 - In the next page, click on **Browse**.
 - Search and select your document in the window provided then click **Open**.
 - Your document will appear in the field beside Browse to indicate it has been selected to be added to your request.
 - Click on the checkbox for Visible to supplier on the purchase order.
 - Click **OK** to be returned to the Summary page.

c) Entering accounting information:

i) To enter the FOP for your items, scroll down to the Line Items section, select the item and click on **Actions** then **Edit**.

ii) The Line Item Details page will open. Scroll down to the **Accounting – by Line Item** section to enter the FOP.

iii) Click on **OK** at the bottom or top of the page once the information is complete.

6) You will be returned to the Summary page of your requisition. Review your request once more to ensure all information is correct. When satisfied, click on **Submit** to submit your purchase request for approval.

NOTE: Check the approval flow of your requisition. If you appear as the final approver, you will need to approve the request in order for a PO to generate. In this instance, you must send the PO directly to the supplier.

