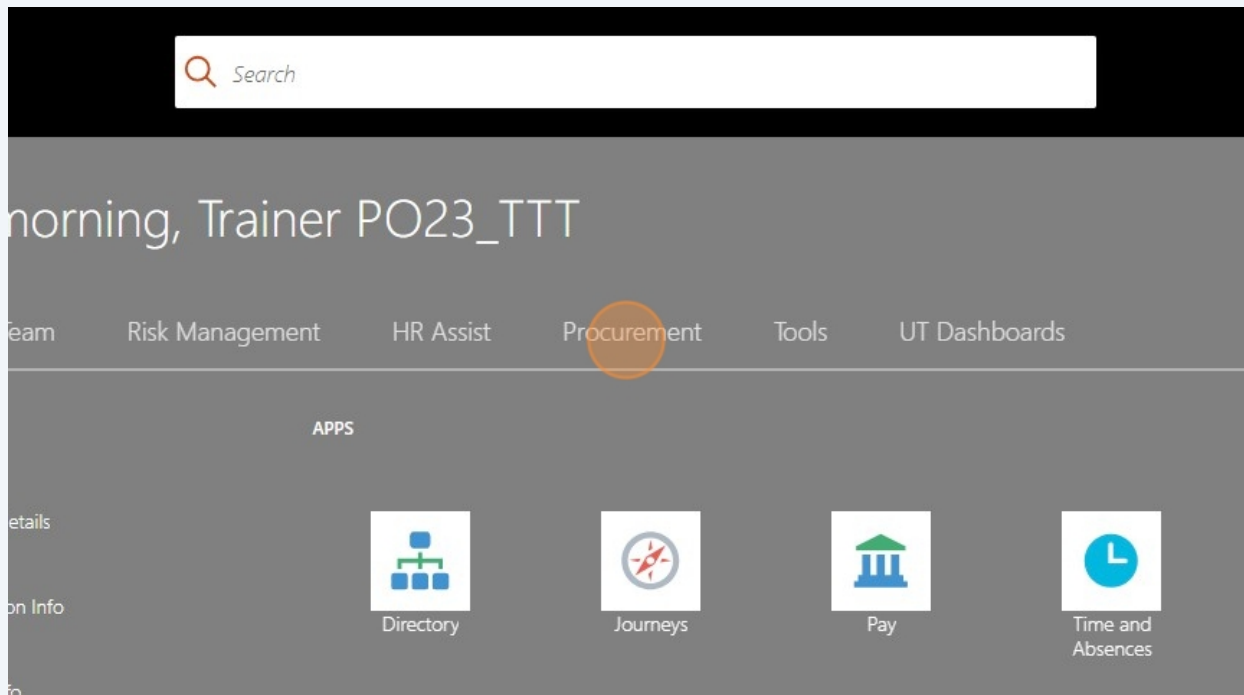
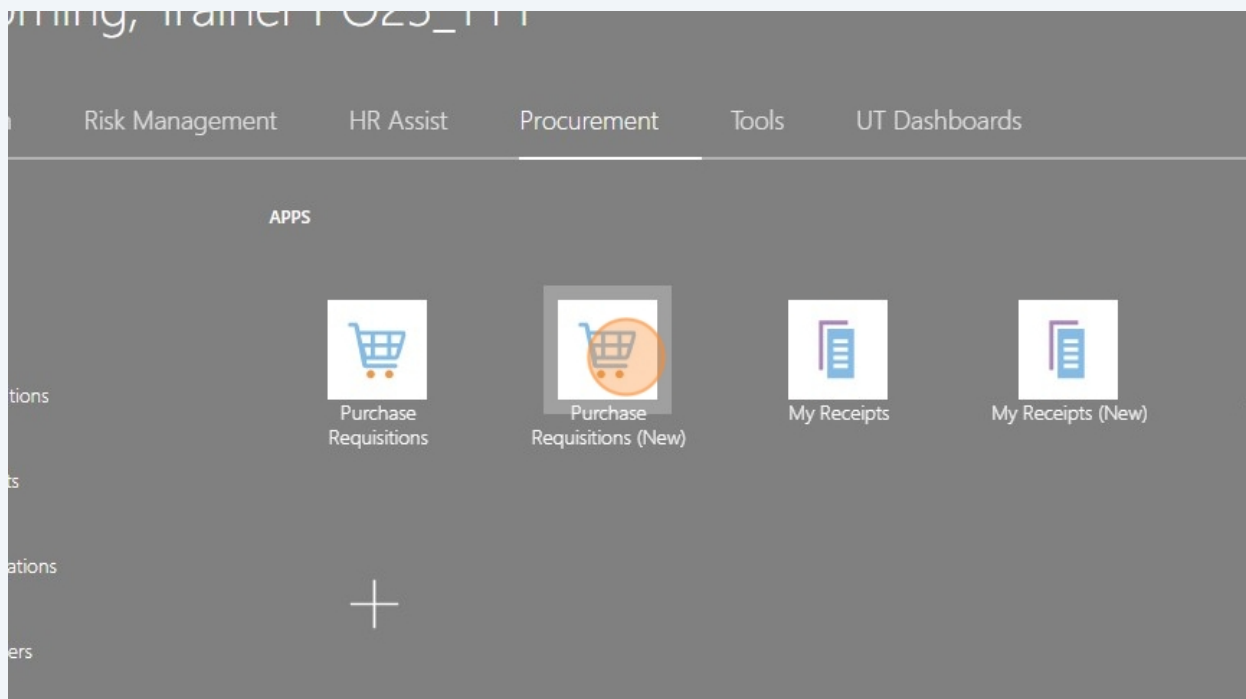


How to Create a Non-Catalog Request (Amount Based). Includes How to Split a GL Code

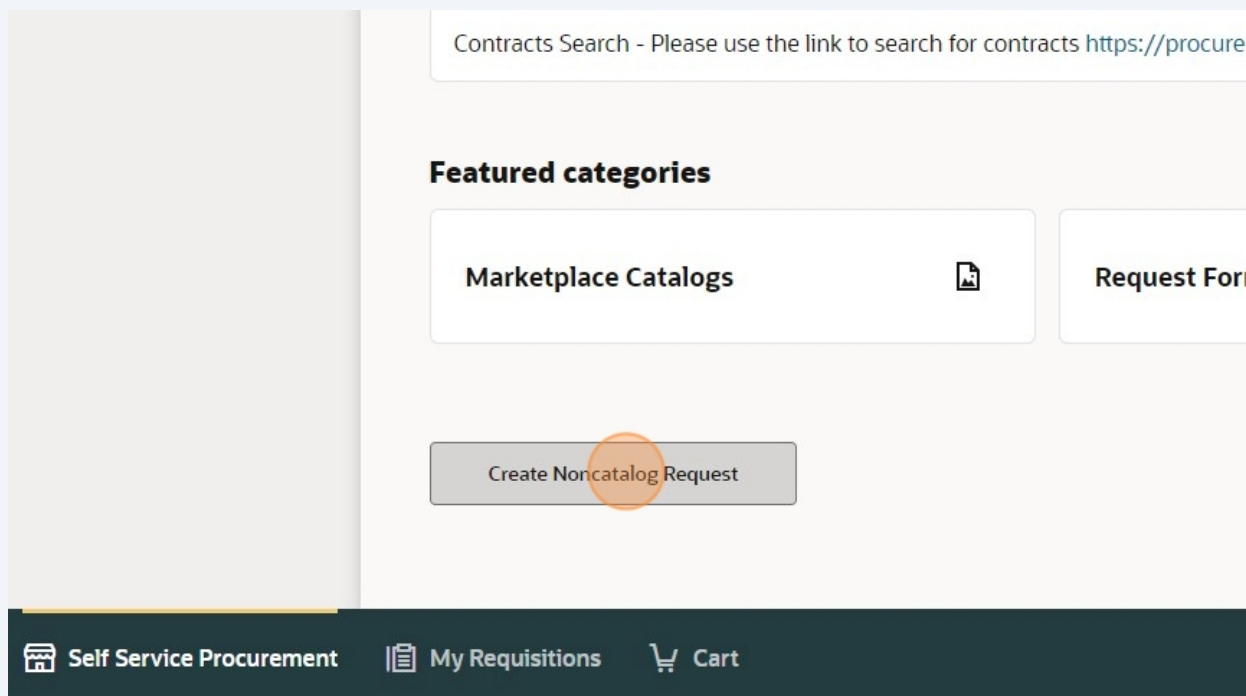
1 Click "Procurement"



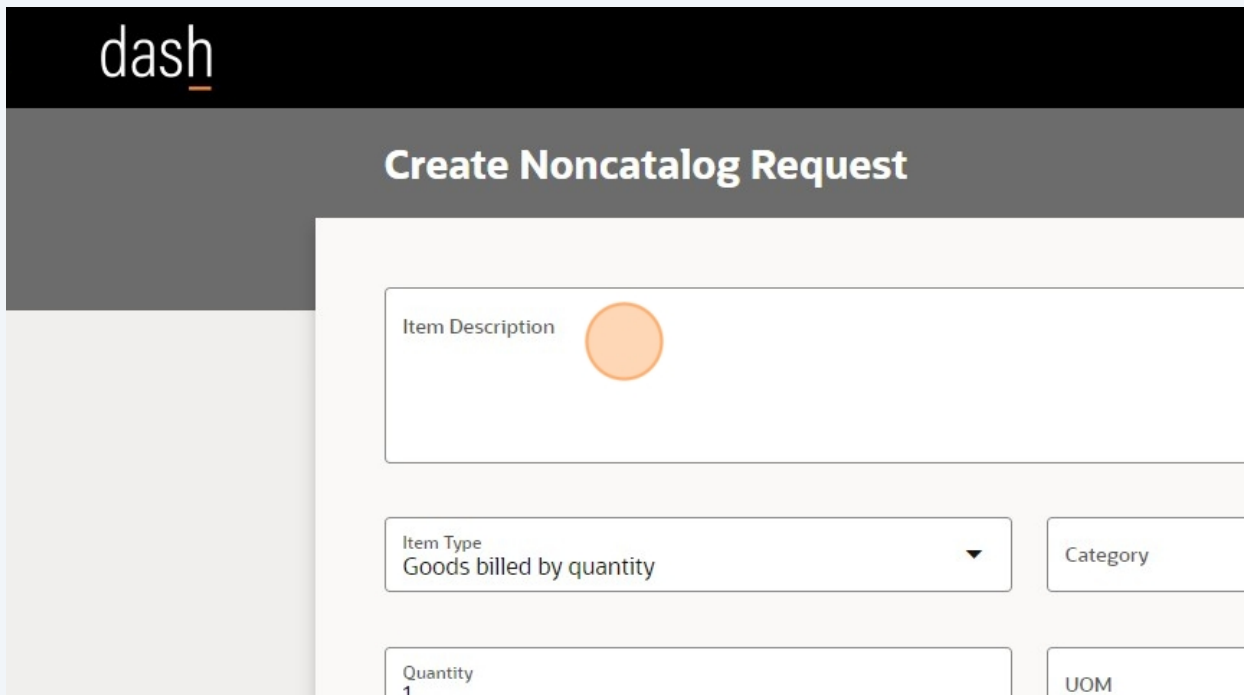
2 Click "Purchase Requisitions (New)"



3 Click "Create Noncatalog Request"

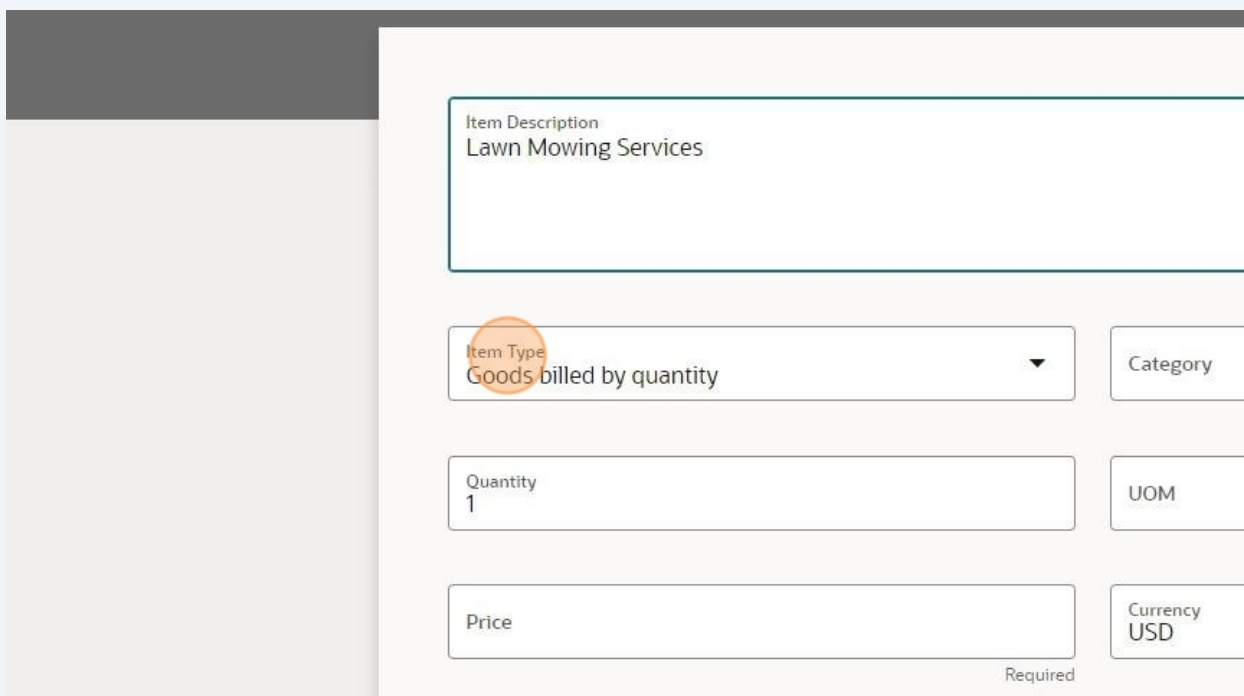


- 4 Click the "Item Description" field and enter the item description.



The screenshot shows the 'dash' dashboard with a 'Create Noncatalog Request' form. The form has a dark header with the 'dash' logo. Below the header, the title 'Create Noncatalog Request' is displayed. The form contains several input fields: 'Item Description' (highlighted with an orange circle), 'Item Type' (a dropdown menu with 'Goods billed by quantity' selected), 'Category', 'Quantity' (with '1' entered), and 'UOM'.

- 5 Click "Item Type"



The screenshot shows the 'dash' dashboard with the 'Create Noncatalog Request' form. The 'Item Description' field now contains the text 'Lawn Mowing Services'. The 'Item Type' dropdown menu is highlighted with an orange circle. The form also shows the 'Category' field, 'Quantity' (with '1' entered), 'UOM', and 'Price' (with 'Required' text below it). The 'Currency' field is set to 'USD'.

6 Click "Services billed by amount"

The screenshot shows a software interface with a dropdown menu for 'Item Type' that is open. The menu items are 'Goods billed by quantity', 'Services billed by amount' (highlighted with an orange circle), and 'Services billed by quantity'. To the right of the dropdown are three input fields: 'Category', 'UOM', and 'Currency USD' (with 'USD' selected). Below these is a 'Manufacturer' section with a search field containing 'Manufacturer' and a search icon. A 'Required' label is positioned below the dropdown menu.

7 Click "Category"

The screenshot shows a software interface with a dropdown menu for 'Category' that is open. The menu items are 'Goods billed by quantity', 'Services billed by amount' (highlighted with an orange circle), and 'Services billed by quantity'. To the right of the dropdown are three input fields: 'Currency USD' (with 'USD' selected), 'Supplier Site', and another dropdown menu. A 'Required' label is positioned below the 'Category' dropdown menu.



Alert! Do not choose a category that starts with UTK or UTHSC. Those are reserved for Facilities Services.

8

Type or scroll to find the category. Landscape is selected in this example.

vices

amount

Category
land

Landscape
Equipment, services

UTK Grounds Equipment

FS UTK Machinery operated by an engine or electric power and used in the landscapi

UTK HVACR [Treatment Systems]

FS UTK A system that filters, de-waters, and compresses landfill gas for sale or benefi

UTK Vehicles

FS UTK A thing used for transporting people or goods, especially on land, such as a c

9 Click the "Amount" field, and enter the dollar amount.

Lawn Mowing Services

Item Type
Services billed by amount

Category
Landscape

Amount
Required

Currency
USD

Supplier

Supplier

Supplier Site

Supplier Contact

10 Click "Supplier"

Item Type
Services billed by amount

Category
Landscape

Amount
200.00
Required

Currency
USD

Supplier

Supplier

Supplier Site

Supplier Contact

Supplier Item

Or Enter new supplier information

11 Type the supplier's name and select from the drop-down options.

The screenshot shows a form with the following elements:

- Amount:** \$200.00
- Currency:** USD
- Supplier:** A dropdown menu with the current selection "rapid". A list of options is open, with "Rapid Automation Design LLC" highlighted by an orange circle.
- Supplier Site:** A text input field.
- Text:** "Or Enter new supplier information"
- Section Header:** "Attachments"

12 Click "Add to Cart"

The screenshot shows a mobile app interface with the following elements:

- Navigation Bar:** Contains "Cancel", "Add to List", and "Add to Cart" buttons. The "Add to Cart" button is highlighted with an orange circle.
- Form Fields:** A vertical stack of three input fields, with the bottom two having dropdown arrows.
- Mobile UI Elements:** A home icon, a notification bell with "13", and a "TP" label are visible in the top right corner. An orange information icon is also present on the right side.

13 Click "View Cart"

Create Noncatalog Request

Item Description

✔ Confirmation

Request added to cart

You can view your cart or create another request with the same supplier.

[View Cart](#)

[Create another request](#)

Item Type
Services billed by amount

Category

Required

Amount

Currency
USD

Required

14 To split the GL Code at the line item level, click the "Pencil" icon to edit

Cart

Requisition REQ1000000292

Lawn Mowing Services

Sold By Rapid Automation Design LLC

Amount
\$200.00



15 Scroll down to "Billing" and click the 3 Dots (...)

Attachments

Category
Internal to Requisition

Drag and Drop
Select or drop files here.

URL


Billing

Total


Total Percentage	Total Amount
100	\$200

Distribution 1
10-1100001-106006-539100-000-0000-00-0000

Percentage	Amount
100	\$200



16 Click "Split"



Edit

Split

17 To split a transaction, first, enter a dollar amount or percentage.

The screenshot shows a transaction entry form. On the left, there is a sidebar with a search bar, a dropdown menu, a dashed box, and an 'Add URL' button. The main form area contains the following elements:


- Amount** and **Percentage** input fields, both circled in orange. The 'Amount' field has a 'Required' label below it.
- Budget Date** field with the value '8/27/2024' and a calendar icon.
- Project costing** section with a **Project Number** dropdown menu.
- Charge account** section with two radio buttons: **Select favorite charge account** and **Enter charge account number**.
- Charge Account Nickname** dropdown menu with the value 'Supplies Account'.
- Account number: **10-1100001-106006-539100-000-0000-00-**


18 In this example, \$130 is being split into Distribution 2.

19 Click "Enter Charge Account Number"


Distribution 2

Amount 130.00	Percentage
------------------	------------

Required 


Budget Date
8/27/2024 


Project costing

Project Number 

Charge account

Select favorite charge account Enter charge account number

Charge Account Nickname
Supplies Account 

 10-1100001-106006-539100-000-0000-00-0000

20

Click the "Charge To" field and delete the default charge account listed.

Project costir

Account	5391...	Operating Su
Program	000	DEFAULT PRC
Activity	0000	Default Activi

Charge accou

InterCo	00	DEFAULT INT
Future	0000	DEFAULT FUT

Select favorite

Charge To
10-1100001-106006-539100-C

Add URL

21

Enter the GL Code

ing

Acco...	-	-
Progr...	000	DEFAULT PROGRAM
Activity	0000	Default Activity
InterCo	00	DEFAULT INTERCOMPANY
Future	0000	DEFAULT FUTURE

unt

...e charge account Enter charge account

Charge To
10-1100001-106006-539107-C

Enter valid segment values for these segments:
Account



Tip! The GL code can be copied and pasted into the "Charge To" field. Otherwise, type the GL code into the the "Charge To" field.

22

When typing the GL code, multiple options will appear in the drop down menu. Select the appropriate code by clicking on it or press enter after typing in the code.

Charge account

Select favorite charge account Enter charge account number

Charge To
10-1100001-106006-539107-

Program	Description
000	DEFAULT PROGRAM
210	INSTRUCTION
220	RESEARCH
230	PUBLIC SERVICE
240	ACADEMIC SUPPORT

23

For example, to type the code in manually type, 10 **enter** 1100001 **enter** 106006 **enter** 539107**enter** 000**enter**0000**enter**00**enter**0000**enter**

24 Click "Create"

Charge To
10-1100001-106006-539107-C

Cancel Create

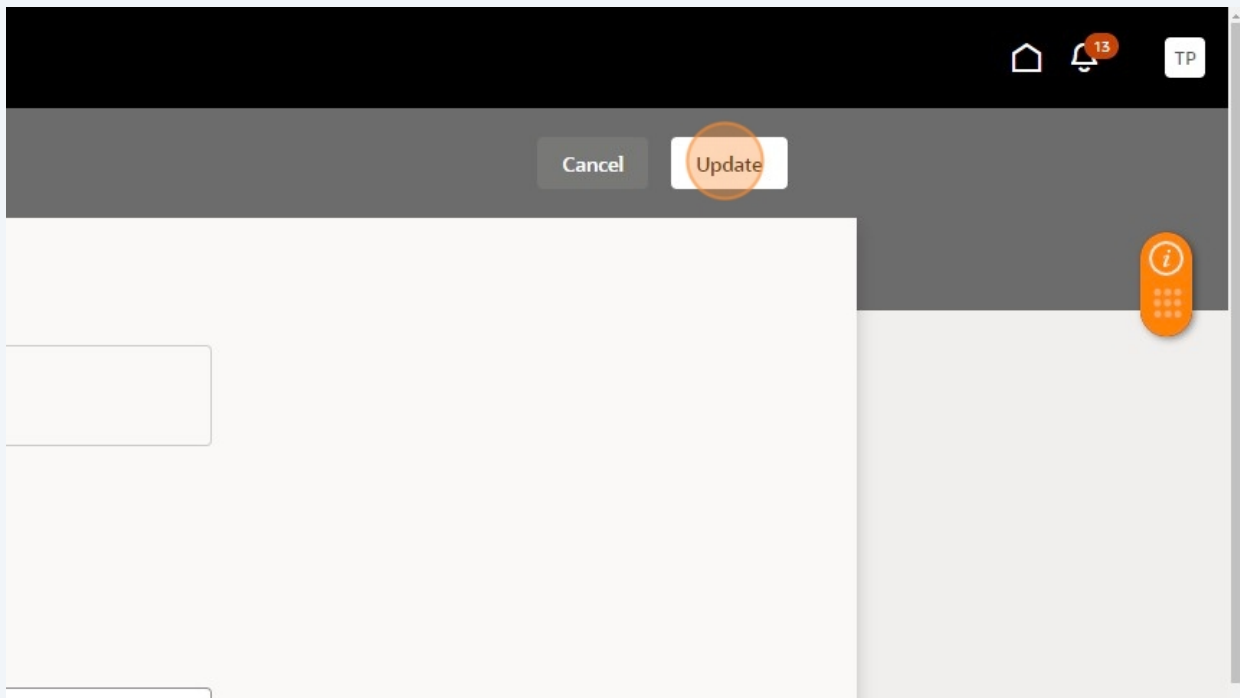
The screenshot shows a form with a 'Charge To' field containing the ID '10-1100001-106006-539107-C'. At the bottom right, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with an orange circle.

25 The billing is now split, \$70/\$130 between the two distributions.

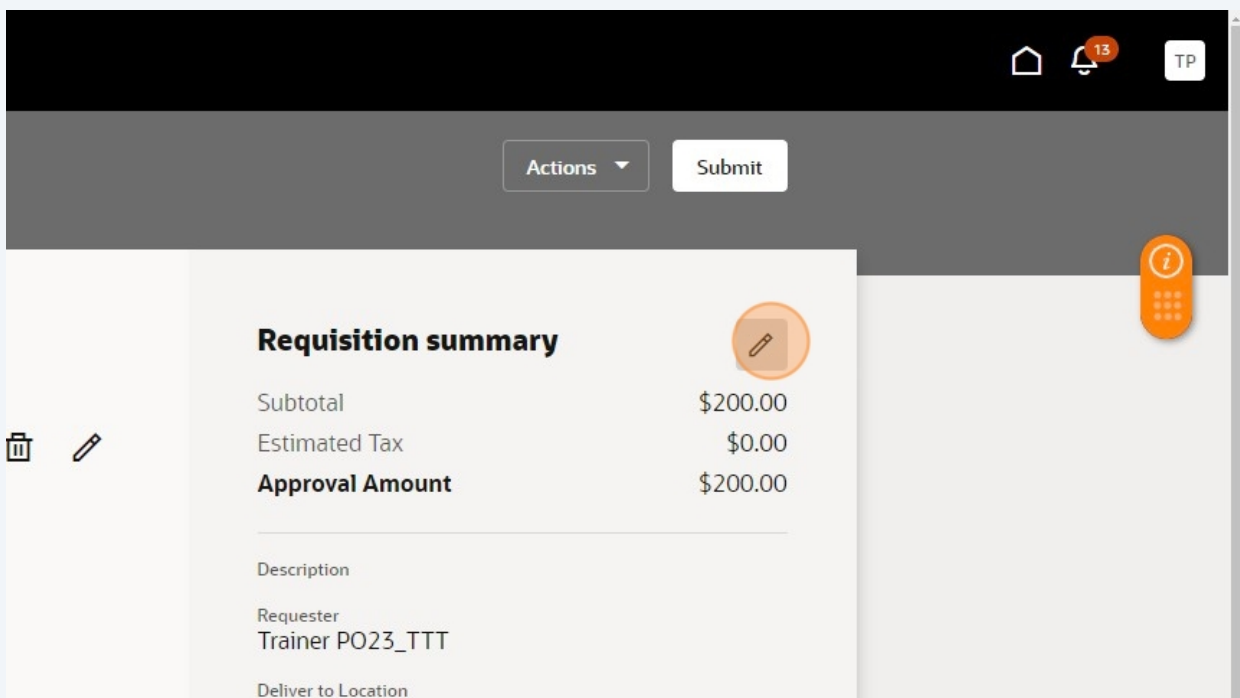
Billing	
Total	
Total Percentage	Total Amount
100	\$200
Distribution 1	
10-1100001-106006-539100-000-0000-00-0000	
Percentage	Amount
35	\$70
Distribution 2	
10-1100001-106006-539107-000-0000-00-0000	
Percentage	Amount
65	\$130

The screenshot displays a 'Billing' summary table. The total amount is \$200. It is split into two distributions: Distribution 1 (35% / \$70) and Distribution 2 (65% / \$130). The \$70 and \$130 amounts are highlighted with green boxes.

26 Click "Update"



27 To update the Requisition Summary, click the "Pencil" icon



28 Scroll down to Additional Information and click Requisition Type.

Budgetary control

Budget Date
8/27/2024



Additional information

Requisition Type
Sole Source- No NCJ Required



Bill-To Location

Notes

Note to Supplier

29 Select "Sole Source - No NCJ Required"

Cooperative contract Attach a copy of the cooperative agreement

Informal Bid Bid conducted by department in accordance with FI0405

Marketplace Catalog Punchout catalog transaction

Sole Source - NCJ Required Attach NCJ form to transaction

Sole Source- No NCJ Required Per FI0405, NCJ form is not required

Standard Purchase - No NCJ Required Initiate a bid, PO under bid limit, or other

State Contract Provide the state contract number

Sub Award Use for payable sub award contracts

URL

30 Click "Drag and Drop" to attach a document



Attachments

Category
Internal to Requisition

Drag and Drop
Select or drop files here.

URL Add URL

31 Once attached, the file will appear as shown below. You can click the 3 Dots to edit or remove the file.



Attachments

Category
Internal to Requisition

Drag and Drop
Select or drop files here.

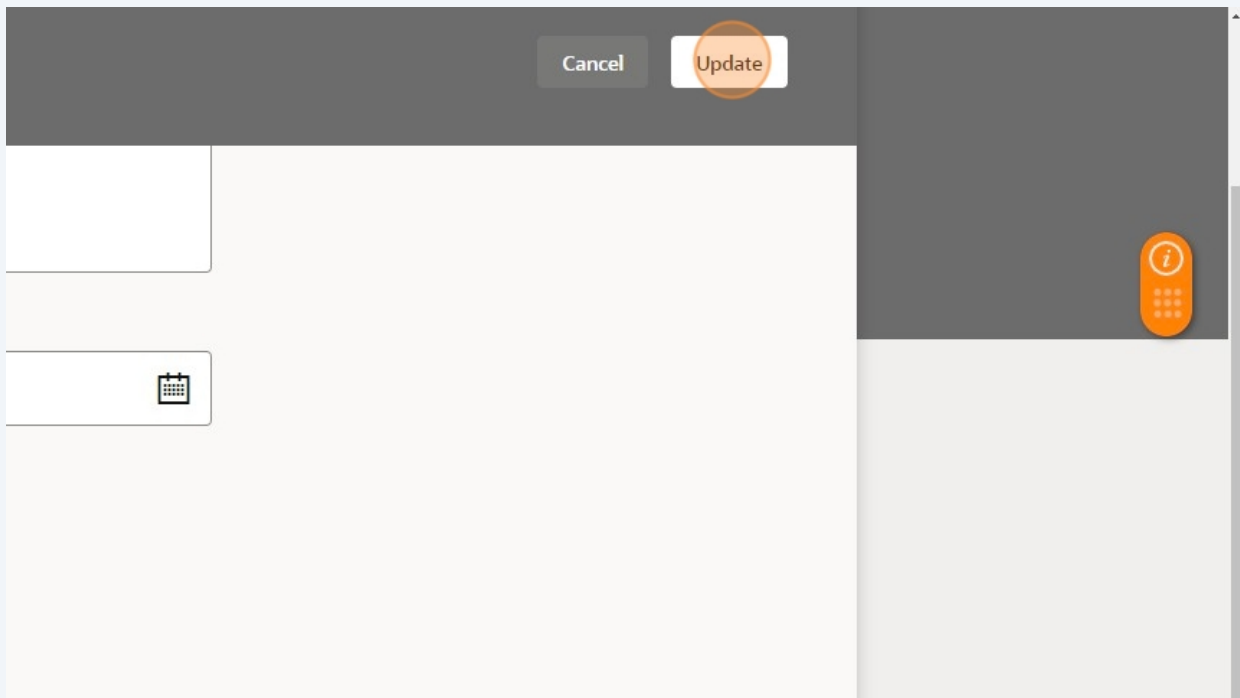
URL Add URL

 Internal to Requisition
Test Supplier Quote.docx
12.83 KB

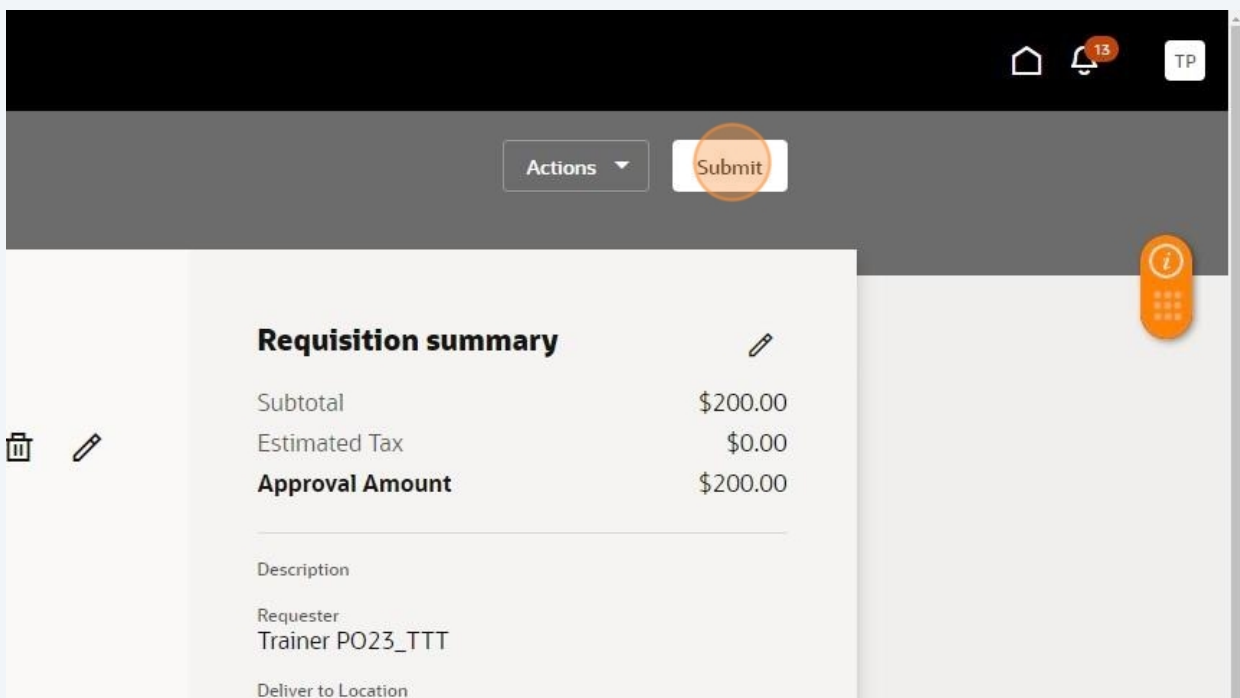
Last updated on 8/27/2024

32 Scroll to the top of the page and click "Update"

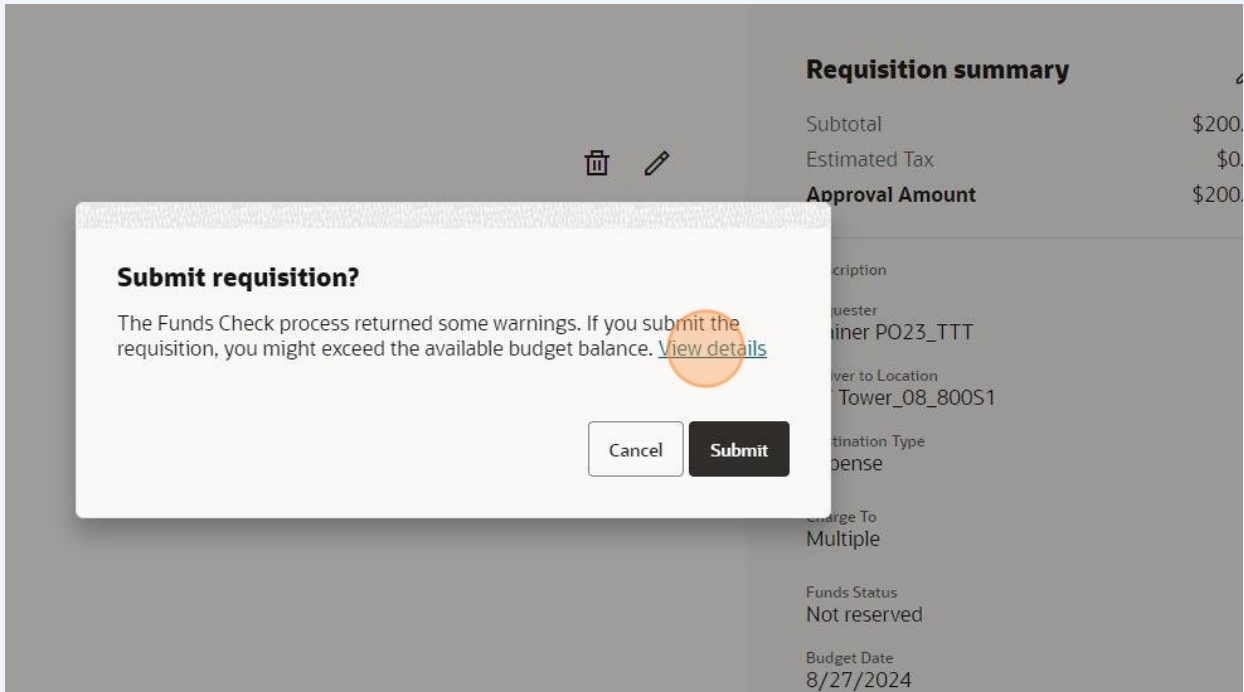


33 Click "Submit"



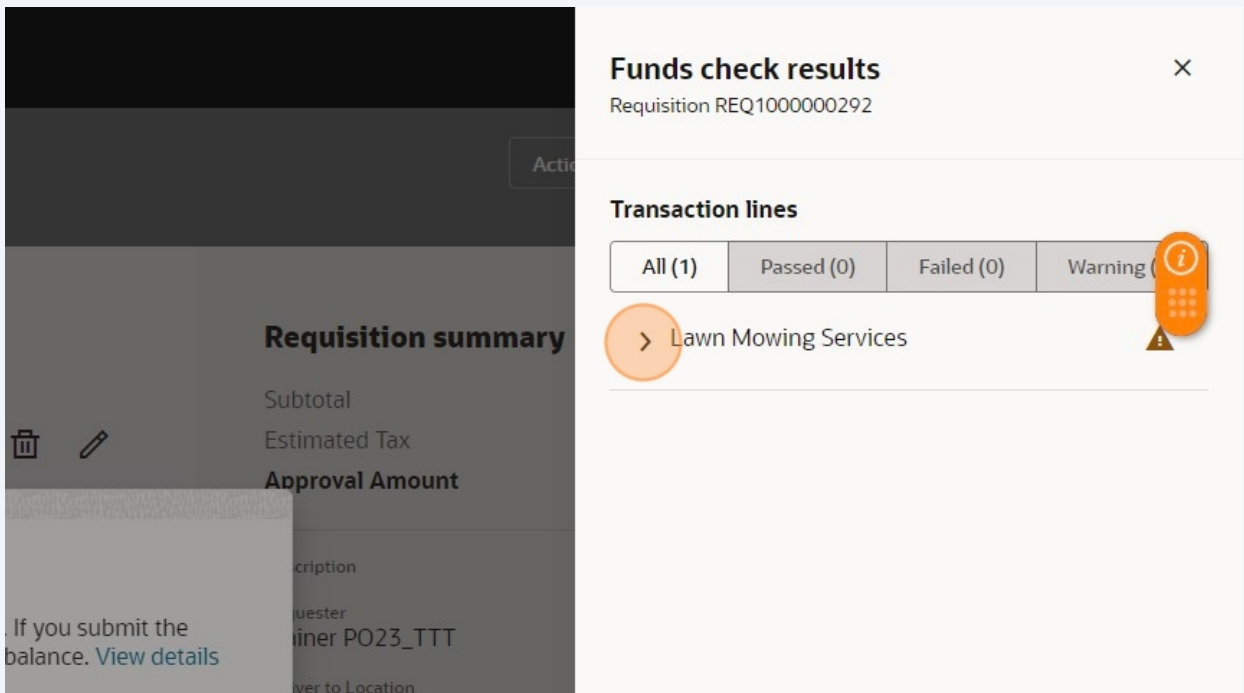
34

A "Submit Requisition" Warning box appears. You can click "View Details" or click "Submit", If you click "View Details" the following screen appears.



35

To view all Fund Check Results click the arrow >



36 Click the "X" to proceed

Funds check results
Requisition REQ1000000292

Transaction lines

All (1)	Passed (0)	Failed (0)	Warning (1)
Lawn Mowing Services			
Impacted control budgets			
UT Budget			
Advisory warning insufficient funds, control level advisory			
Budget Manager Destany Hu			
Budget Account 10-1100001-106006-539107-000-0000			
Budget Period 25-02			

Requisition summary

Subtotal
Estimated Tax
Approval Amount

37 Click "Submit"

Submit requisition?

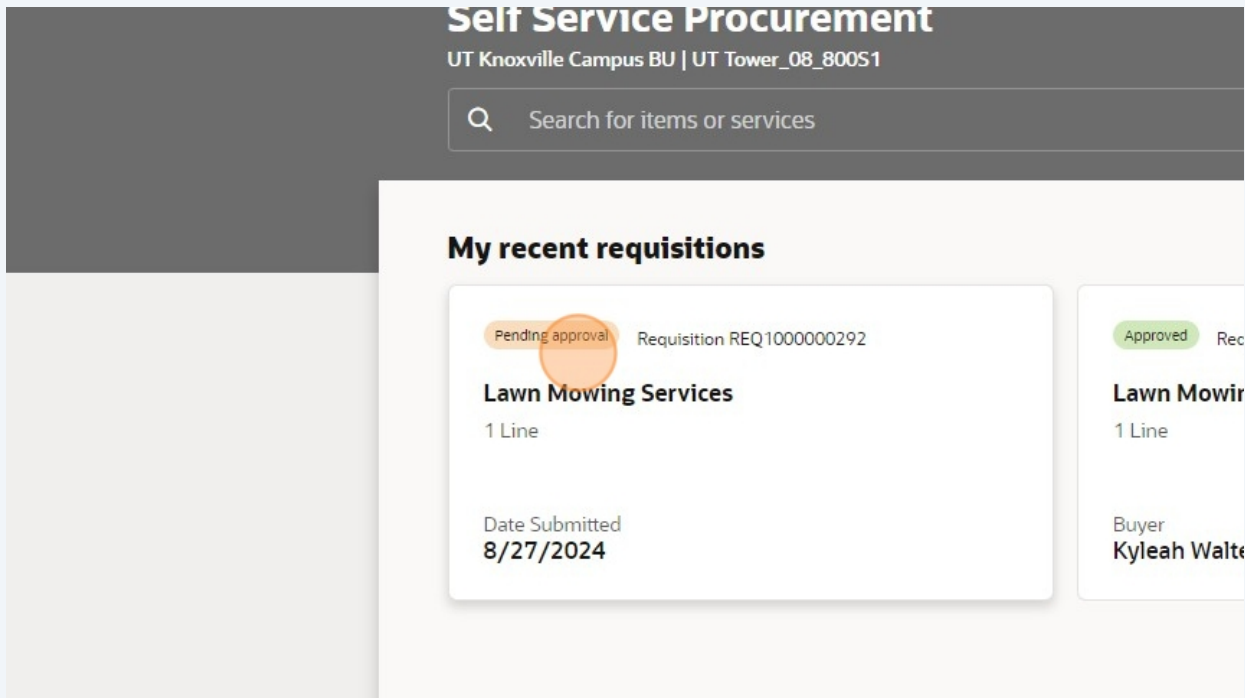
Funds Check process returned some warnings. If you submit the requisition, you might exceed the available budget balance. [View details](#)

Cancel Submit

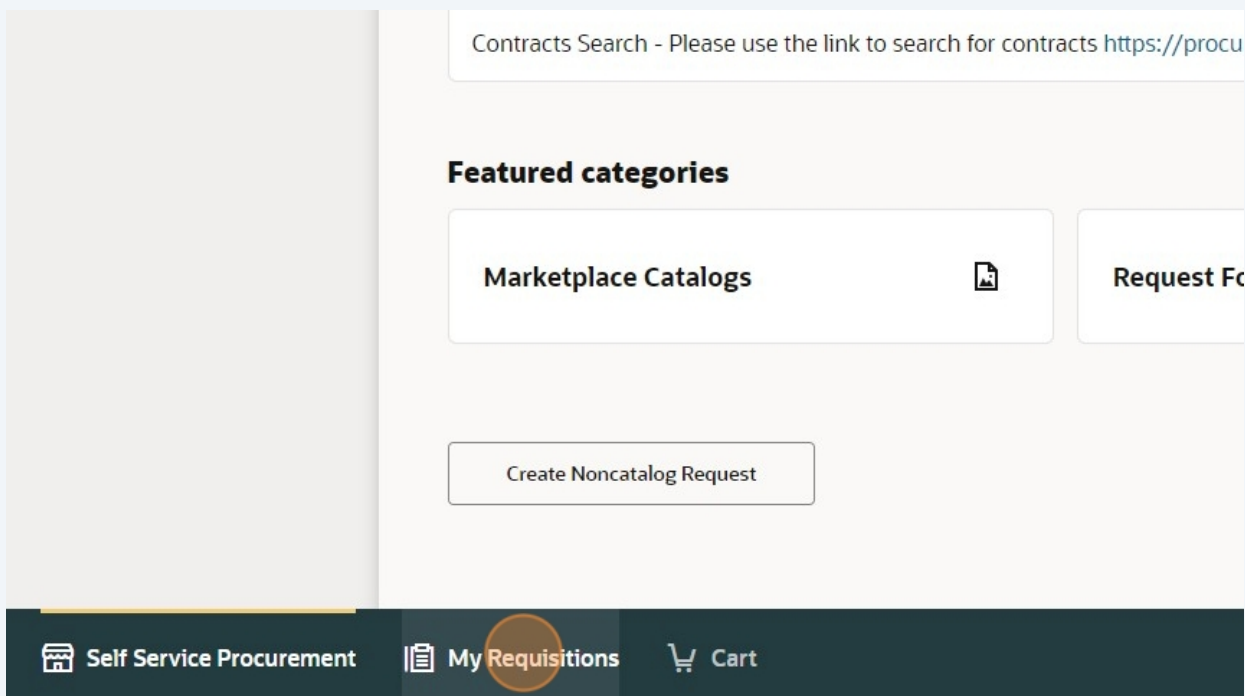
Estimated Tax \$0.00
Approval Amount \$200.00

Description
Requester
Requisition Line PO23_TTT
Transfer to Location Tower_08_800S1
Destination Type Expense
Charge To Multiple
Funds Status Not reserved
Budget Date 8/27/2024
Attachments 1 attachment

38 Congratulations! Your requisition has been created and is pending approval



39 Click "My Requisitions" to review details of recent transactions



40

Click the "3 Dots" (...) to see additional requisition details including the approval chain

My Requisitions

Entered By Trainer PO23_TTT Search for requisitions

Submission Date Last Week 5 Creation Date Last Week 5 Category Landscape 2 Supplier Rapid Automation Design LLC 2 More Filters

6 results

Requisition ID	Item Name	Status	Entered By	Approval Date	Quantity	Amount	Actions
REQ100000292	Lawn Mowing Services	Pending approval	Entered By Trainer PO23_TTT			\$200.00	...
REQ100000245	Office Chairs	Approved	Entered By Trainer PO23_TTT	8/22/2024	5 Each		...
REQ100000244	Lawn Mowing Services	Approved	Entered By Trainer PO23_TTT	8/22/2024		\$200.00	...
REQ100000243	Microscope repair services	Ordered	Entered By Trainer PO23_TTT			\$750.00	...

41

Click "View Approvers"

Design LLC 2 More Filters

8/27/2024	...
\$200.00	...
8/27/2024	...
\$200.00	...

- View Approvers
- Edit
- Withdraw
- Cancel

42

Click the arrow < to go back to the "My Requisitions" screen

Approvers
Requisition REQ1000000292

Entered By **Trainer PO23_TTT** Business Unit **UT Knoxville Campus BU** Description **Lawn Mowing Services**

⌚	Pending approval by Vickie Ann Stamos Preapproval Header First Responder Wins	8/27/2024 2:40 PM
⌚	Pending approval by Rosnlind Stripling Preapproval Header First Responder Wins	8/27/2024 2:40 PM
⌚	Pending approval by Ciare Farrell Preapproval Header First Responder Wins	8/27/2024 2:40 PM
⌚	Pending approval by Maria Barakzai Preapproval Header Consensus	8/27/2024 2:40 PM
⬆️	Submitted by You REQ1000000292.pdf	8/27/2024 2:40 PM

43 Click "Self Service Procurement" to enter another requisition

The screenshot displays a list of requisitions in a table format. The table has two columns: 'Requisition ID' and 'Details'. The requisitions listed are:

Requisition ID	Details
REQ1000000243	Entered By Trainer PO23_TTT Office Chairs Approval Date: 8/22/2024 Status: Approved
REQ1000000244	Lawn Mowing Services Entered By Trainer PO23_TTT Lawn Mowing Services Approval Date: 8/22/2024 Status: Approved
REQ1000000243	Microscope repair services Entered By Trainer PO23_TTT Microscope repair services Purchase Order: PO100000000127 sold by Nikon Instruments Status: Ordered
REQ1000000242	Tart Cherry Juice Entered By Trainer PO23_TTT Tart Cherry Juice Status: Approved

At the bottom of the screen is a dark navigation bar with three items: 'Self Service Procurement' (with a building icon and a blue circle highlight), 'My Requisitions' (with a list icon), and 'Cart' (with a shopping cart icon).

44 Congratulations! You have submitted an amount-based non-catalog requisition, split the GL code, and reviewed the workflow approval.