

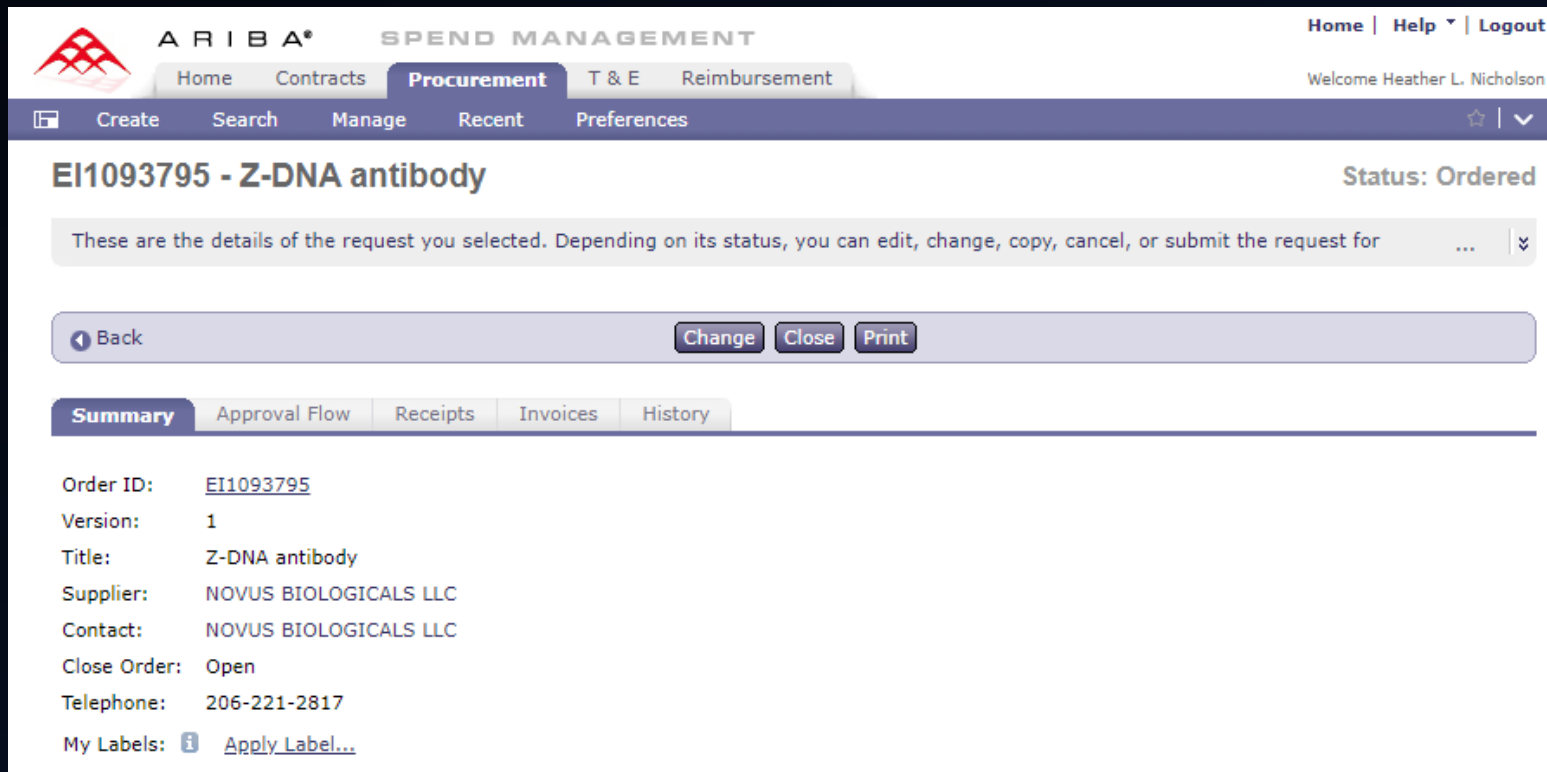
# Non-Catalog Orders (EI)

PROCUREMENT SERVICES  
WEBCAST TRAINING SERIES - 5/19/2022

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# What is a Non-Catalog Order?

A Non-Catalog Purchase Order is a way to place an order in Ariba to a supplier for goods and/or services.



The screenshot displays the Ariba Spend Management interface. At the top, the Ariba logo and 'SPEND MANAGEMENT' are visible. The navigation bar includes 'Home', 'Contracts', 'Procurement' (selected), 'T & E', and 'Reimbursement'. The user is identified as Heather L. Nicholson. The main content area shows a purchase order titled 'EI1093795 - Z-DNA antibody' with a status of 'Ordered'. Below the title, there is a description of the request and a set of action buttons: 'Back', 'Change', 'Close', and 'Print'. A tabbed interface below the buttons shows 'Summary' as the active tab, with other tabs for 'Approval Flow', 'Receipts', 'Invoices', and 'History'. The 'Summary' tab displays the following details:

- Order ID: [EI1093795](#)
- Version: 1
- Title: Z-DNA antibody
- Supplier: NOVUS BIOLOGICALS LLC
- Contact: NOVUS BIOLOGICALS LLC
- Close Order: Open
- Telephone: 206-221-2817
- My Labels: [Apply Label...](#)

## Background Information



## What to Know Before You Begin



## Demonstration



## Best Practices



# Background Information

# When To Use:

- The goods or services are not available in any of the more than 60 hosted or punchout catalogs available in Ariba
- The goods or services are not reoccurring purchases
- The order involves fixed quantities and/or dollar amounts
- One-time purchase
- The supplier requires a purchase order to place the order

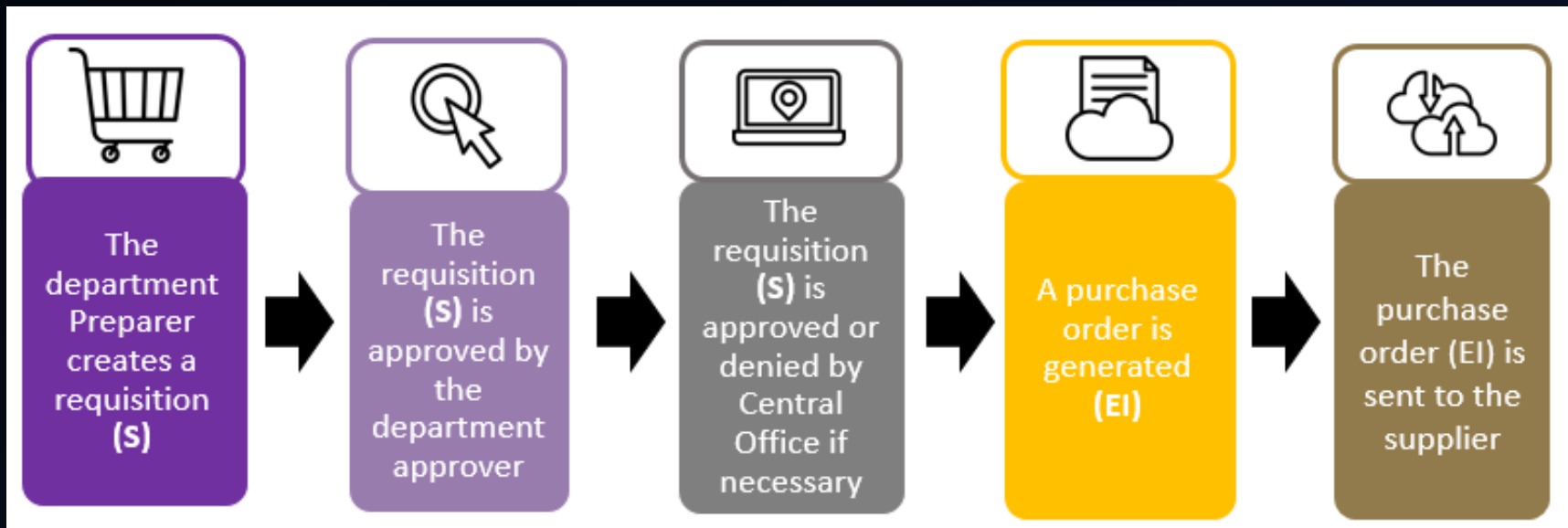
# Special Feature of Non-Catalogs:

- Starts as a requisition and becomes a purchase order when fully approved

Ex: S12345->EI67890

- Suppliers do not need to be on the Ariba Network to place orders. Almost all suppliers in the supplier database are available in Ariba to place Non-Catalog purchase orders with.
- For orders over and under the Direct Buy Limit

# Process Flow for a Non-Catalog Order over the Direct Buy Limit



# What to Know Before You Begin



# How to Start:

- ✓ Check the supplier search report to see if your supplier is registered and active.

The screenshot shows the 'Supplier Search' report interface. At the top, the University of Washington logo and 'Enterprise Reporting & Analytics' are visible. The user 'Heather Nicholson' is logged in. The search criteria are set to 'Supplier Number' with a value of '110557'. The report ID is 'FIN1081' and it was generated on '3/6/20 11:05 AM'. An executive summary explains that the report lists registered UW suppliers and their status. Below this, there are navigation links for 'Domestic Supplier', 'Foreign Supplier', 'Report User Guide', and 'Question or Feedback?'. A table displays the search results for the supplier 'SEATTLE CHILDRENS HOSPITAL'.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	Status
SEATTLE CHILDRENS HOSPITAL	110557	Non-Profit	05-12-1985	Matches IRS EIN Records	Y	Active

- ASTRA authorization to EDW is required to access the Business Intelligence Portal (B.I. Portal)
- ASTRA role for EDW - Administrator/Manager/FiscalTech

# Supplier Search Report:

Look for the supplier being “Available in Ariba” and an active Order-From” address. If the correct address is not there, contact [pcshelp@uw.edu](mailto:pcshelp@uw.edu) for guidance.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba
<input type="checkbox"/> JOHNSONBARROW INC	103075	Corporation	04-27-1985	Matches IRS EIN Records	Y
Address Type	Seq #	Address	Status	Ready for BPO	Ariba Network
Order From	1	1414 31ST AVE S SUITE 201 SEATTLE, WA 98144	Active	N	N
Order From	4	2203 23RD AVE S SEATTLE, WA 98144	Active	N	N
Address Type	Seq #	Address	Status	Payment Method	
Remit To	3	2203 23RD AVE S SEATTLE, WA 98144	Active	Check	

<https://biportal.uw.edu/Report/Details/SupplierSearch>

# Supplier Search Report:

**Hint:** You do not need to have the payment method set in order to set up your Non-Catalog order.

It will need to be set to make payment.

Address	Status	Ready for BPO	Ariba Network
4326 UNIV WAY NE SEATTLE, WA 98105	Active	Y	Y
Address	Status	Payment Method	
ACCOUNTS PAYABLE 4326 UNIVERSITY WAY NE SEATTLE, WA 98105	Active	TBD	

# Supplier Search Report :

**Hint:** You do not need to have the supplier on the Ariba Network to set up your Non-Catalog order. You will just need a supplier's email address where the order can be sent.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	
<input type="checkbox"/> JOHNSONBARROW INC	103075	Corporation	04-27-1985	Matches IRS EIN Records	Y	
	<b>Address Type</b>	<b>Seq #</b>	<b>Address</b>	<b>Status</b>	<b>Ready for BPO</b>	<b>Ariba Network</b>
	Order From	1	1414 31ST AVE S SUITE 201 SEATTLE, WA 98144	Active	N	N
	Order From	4	2203 23RD AVE S SEATTLE, WA 98144	Active	N	N
	<b>Address Type</b>	<b>Seq #</b>	<b>Address</b>	<b>Status</b>	<b>Payment Method</b>	
	Remit To	3	2203 23RD AVE S SEATTLE, WA 98144	Active	Check	

# Have Order Information Ready

- Item/s description
- Supplier name and supplier location (supplier location = supplier “order from” address)
- Item number/s
- Amount
- Attachment/s (i.e.: Quote)
- Budget/s
- Commodity Code/s
- Account Code/s
- Sole source justification if a contract or competitive solicitation was not used and the amount is over the Direct Buy Limit
- Send PO To Field information (email address) if the supplier is not an Ariba Network Supplier

# Direct Buy Limit and Central Office:

Current Direct Buy Limit is 10K

Non-Catalog orders over the [Direct Buy Limit](#) will be routed to Purchasing, for a buyer's review and approval.

Possible Central Office Reviewers:

- Purchasing (i.e.: Goods&Services Approval)
- Equipment Inventory Office (EIO)
- Environmental Health and Safety (EHS)

# Contract Review for Non-Catalog:

If a contract needs to be reviewed by Purchasing as part of a Non-Catalog order:

- Over the Direct Buy Limit: Add as an attachment to the requisition
- Under the Direct Buy Limit: Select “Yes” to the option shown below.

## Under Direct Buy Limit Contract Review:

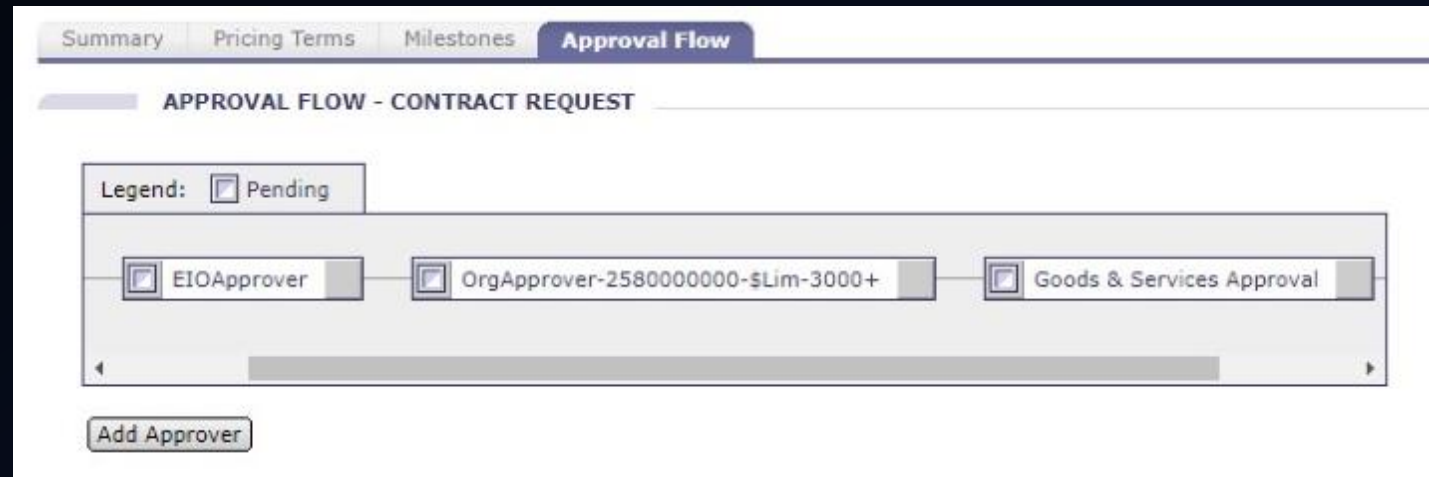
Do you have an agreement that needs to be reviewed and/or signed?

Yes  No

For more information, visit [HERE](#).

# Approval Flow

**Hint:** You can click on the role name to see who is assigned to that role and can complete that approval. For Purchasing roles, check the SME list to see who more specifically you can email (<https://finance.uw.edu/ps/contact-us/subject-matter-experts>)







# Demonstration



# Best Practices

# Best Practices

## Pre-Order

- Consider catalogs and contract search first
- Talk to the supplier first to make sure they will accept the order
- Don't sign any contracts
- Do not use for long term orders with multiple invoicing (use BPO)
- Do not place an order with the supplier before placing the order through Non-Catalog, it will cause duplication

# Best Practices

## Order Entry

- Choose the correct supplier when setting up the requisition
- Select the correct “Order From” address
- Be accurate with entry, after approved the order cannot be edited.
- Any attachments that go to the supplier should be flagged as “visible to supplier”
- Any comments for suppliers need to be flagged as “visible to supplier”
- If the supplier requires a mailing address on the order that doesn’t already show up, you can add this to the Comments section and mark “visible to supplier.”
- Add attachments on Summary screen and not the line item.

# Best Practices

- Have an accurate email address for the supplier if the supplier is not on the network.

## Line Item Entry

- If the quantity is set as 1 on your Non-Catalog, the supplier can invoice only once no matter the value of the line.
- Don't change the ship-to address per line item. One minor difference can cause the requisition to split into multiple orders
- Don't make the description name too long, it can cause an error. To view that error, click on the Approval Flow tab.
- Do not use "lot" as a unit of measure on line items.

# Best Practices

- If the purchase has installments and you know the correct price, you can set up a separate line item for each installment payment. Or if each payment is equal, assign the correct quantity for the installment payments.

## Post-order

- Avoid paying outside the order. Causes a lack of transparency.
- If the supplier contacts you to say the pricing on the order is incorrect, you need to cancel the existing order with the supplier and create a new one with the correct pricing.

# Resources

eLearning Training: <https://finance.uw.edu/ps/resources/training/tutorials>

Non-Catalog Page:

<https://finance.uw.edu/ps/how-to-buy/ariba/non-catalog-purchase-orders>

Contracts Search:

<https://rpt1.fmdata.uw.edu/Reports/report/Procurement%20-%20PDR/Contracts/UW%20Contracts%20Search>



## Questions?

Remember to send to “Everyone” when using  
the chat