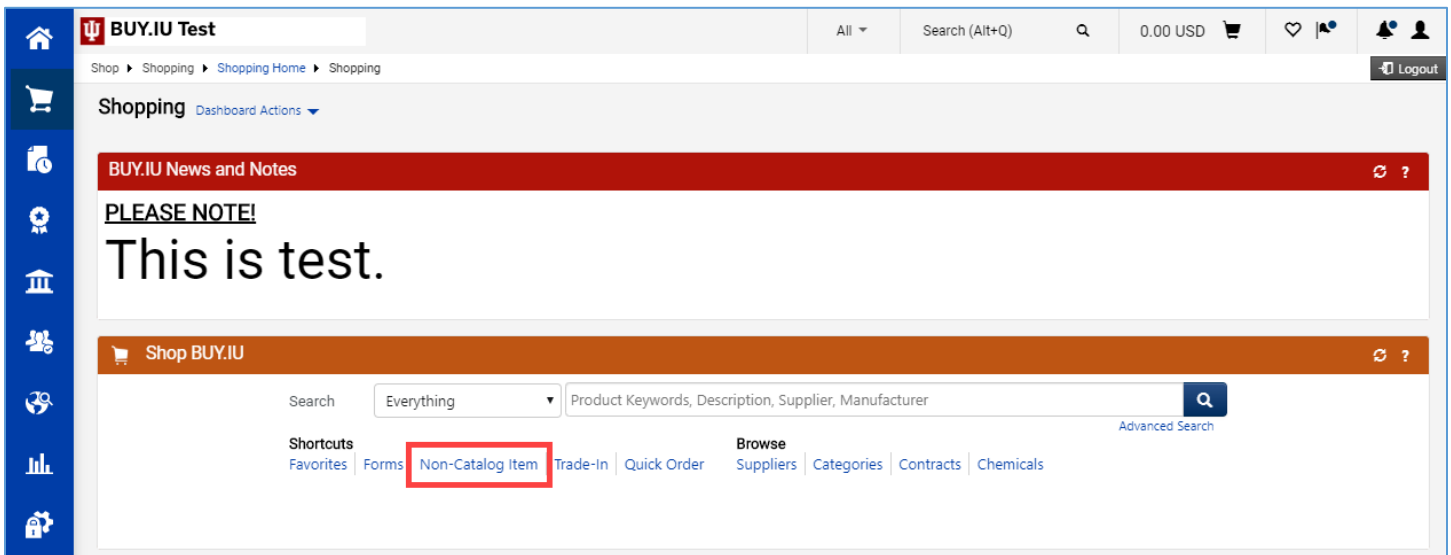


# Request Sourcing or Quotes

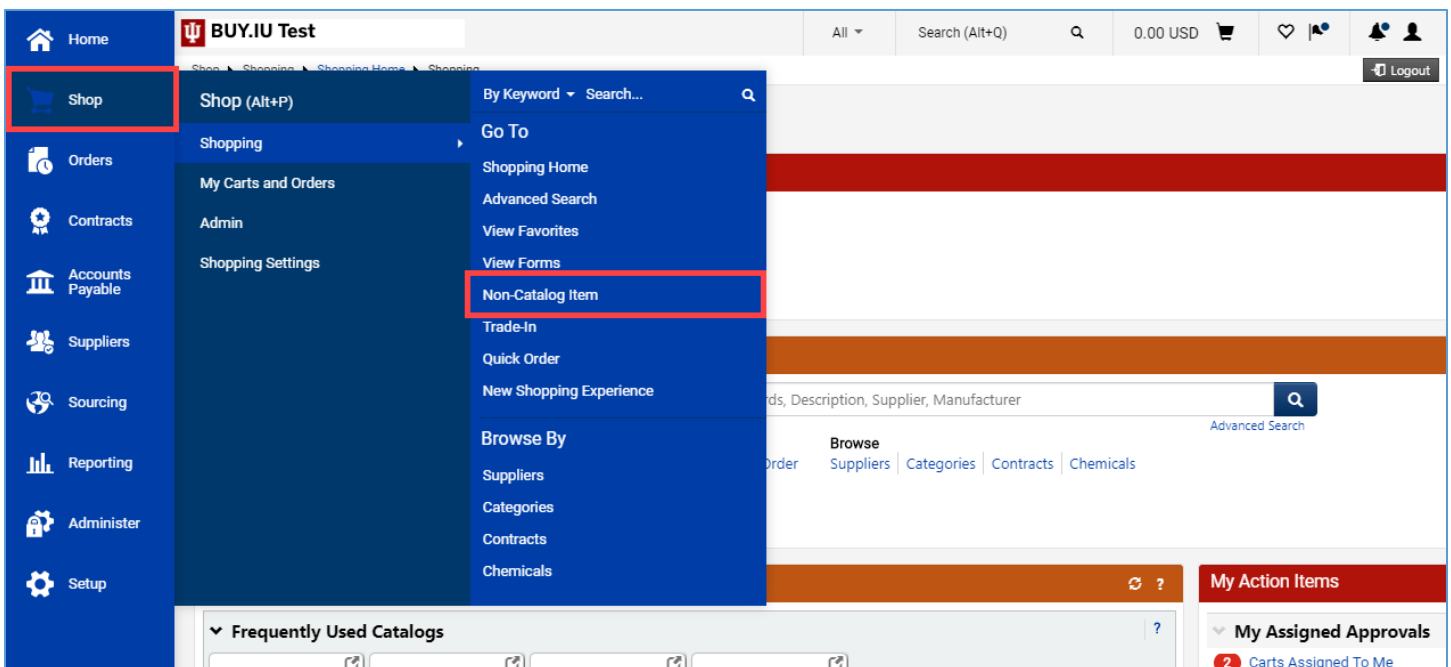
Sourcing is used by Purchasing to request quotes from multiple suppliers for one purchasing event. Generally, single transactions exceeding \$10,000 must be competitively bid, or sourced, by Purchasing staff. Review policy [FIN-PURCH-03 – Competition and Sourcing](#) for additional details.

This document demonstrates how to setup a non-catalog item order and request sourcing on an order. Learn more about non-catalog orders by reviewing this [written document](#) or watching this [short video](#).

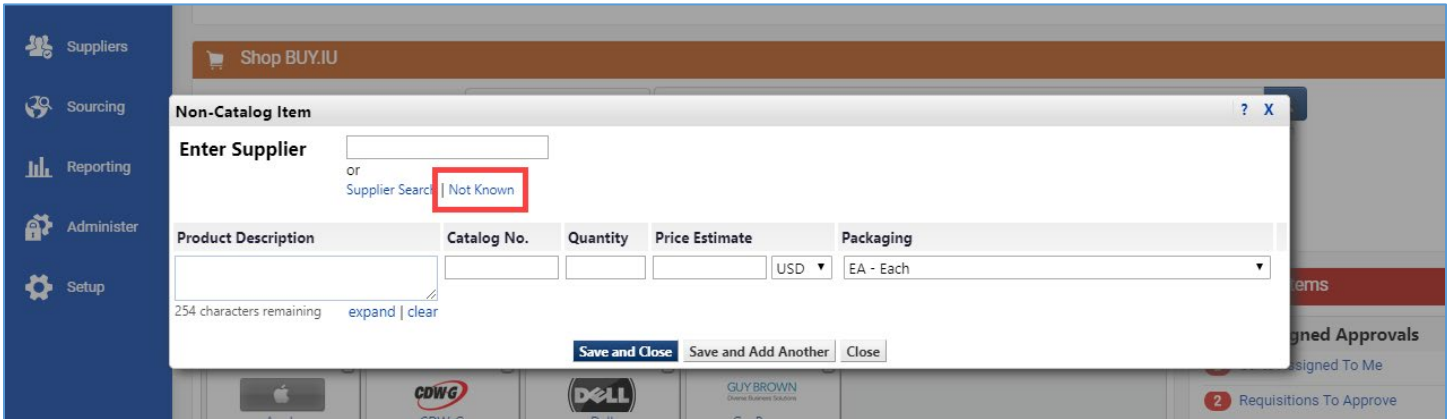
Start by initiating a non-catalog item order. This can be done by clicking **Non-Catalog Item** on the Shopping homepage.



You may also start this process by navigating to **Non-Catalog Item** in the **Shopping module** in the left-hand menu.



A new window appears. Here, click **Not Known**, located under the supplier search field. This selection forces the requisition to route through Purchasing for review.

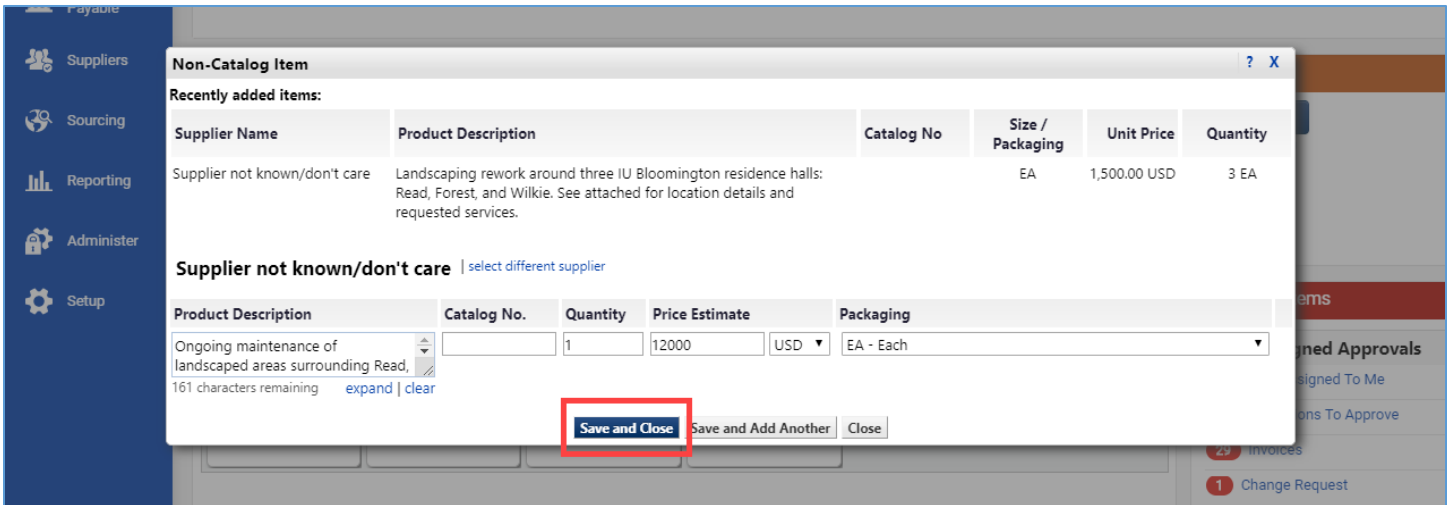


Next, enter details about the items to be purchased or services to be performed in the **Product Description** field, enter the quantity needed in the **Quantity** field, and an estimate of how much you anticipate spending in the **Price Estimate** field. If your order consists of multiple goods or services, itemize the order appropriately by clicking **Save and Add Another** to add new lines. The Product Description field offers 254 characters. Additional characters can be added during the order review process.

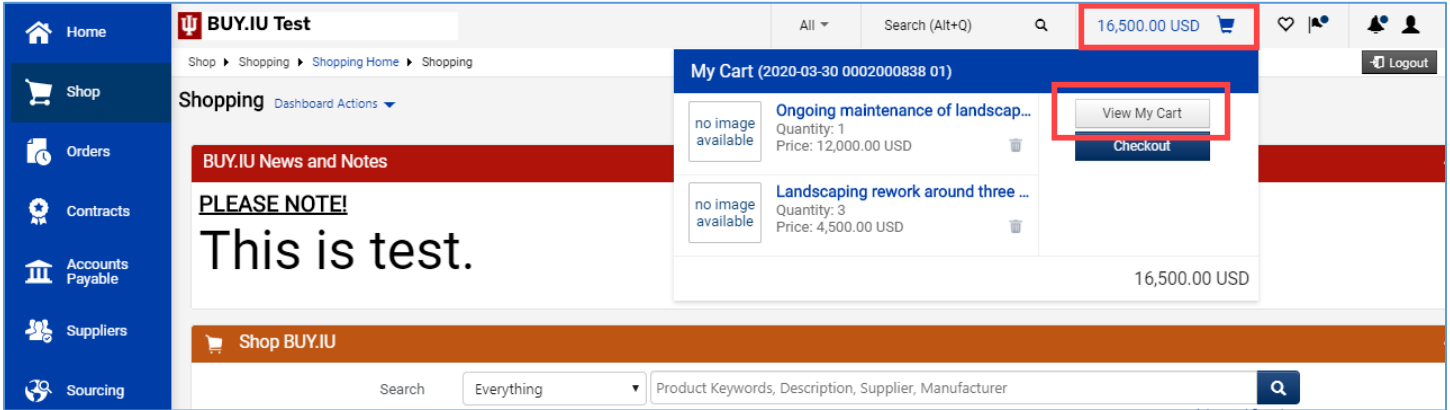
The details entered are used by Purchasing to solicit quotes and will eventually be used to generate a purchase order. Additional documentation, such as a written request or item specifications, can be added to the order on the requisition.

In this example, we are requesting landscaping around three campus residence halls, as well as ongoing maintenance of the grounds over the next year. We will enter two line items: one for the initial service and another for the ongoing maintenance.

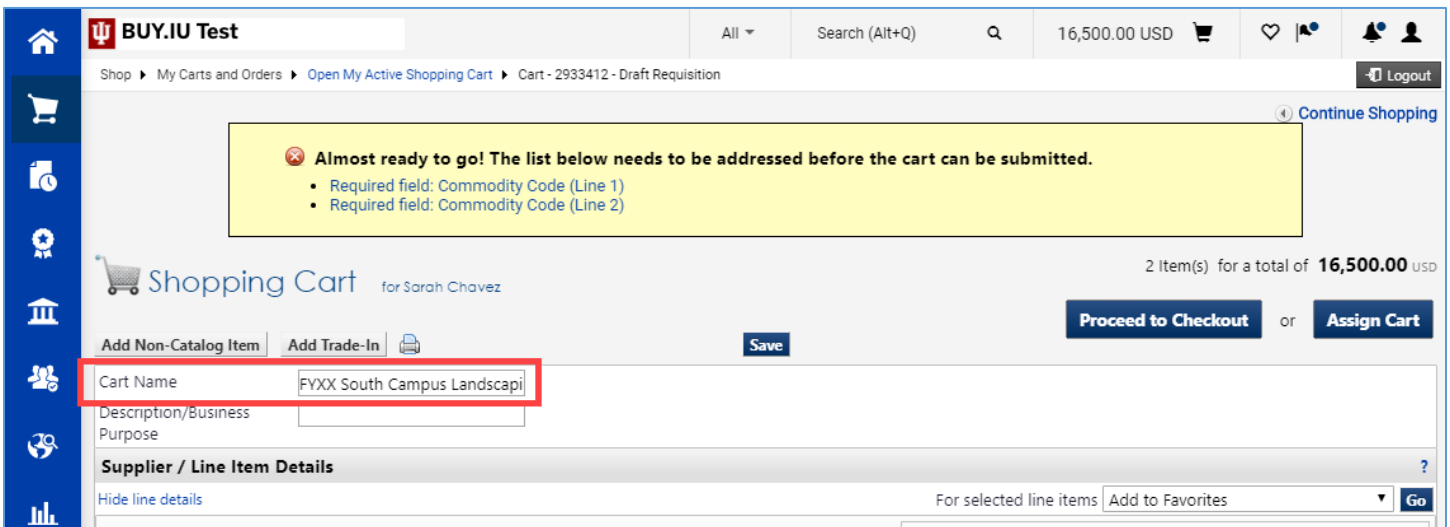
When all item lines are added, click **Save and Close**.



Navigate to your cart by clicking the **shopping cart icon** in the upper right-hand corner, then **View My Cart**.



Update the **Cart Name** field. The Cart Name is searchable in BUY.IU and visible to approvers. It is not visible to suppliers.



Next, a commodity code must be associated with each line. A commodity code represents the types of goods or services being requested and impacts how the document routes. Click the **magnifying glass** next to the commodity code field to search.

**Almost ready to go! The list below needs to be addressed before the cart can be submitted.**

- Required field: Commodity Code (Line 1)
- Required field: Commodity Code (Line 2)

Shopping Cart for Sarah Chavez | 2 Item(s) for a total of **16,500.00 USD**

Buttons: **Proceed to Checkout** or **Assign Cart**

Cart Name: FVXX South Campus Landscapi

**Supplier / Line Item Details**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Landscaping rework around three IU Bloomington residence halls: Read, Forest, and Wilkie. See attached for location details and requested services. <a href="#">more info...</a>		EA	1,500.00	3 EA	4,500.00 USD
Commodity Code <input type="text"/>		Internal Note <input type="text"/>		External Note <input type="text"/>	
Capital Asset? <input type="checkbox"/>		Required field <input type="text"/>		Add discount...	
2 Ongoing maintenance of landscaped areas surrounding Read, Forest, and Wilkie residence halls. <a href="#">more info...</a>		EA	12,000.00	1 EA	12,000.00 USD
Commodity Code <input type="text"/>		Internal Note <input type="text"/>		External Note <input type="text"/>	
Capital Asset? <input type="checkbox"/>		Required field <input type="text"/>		Add discount...	

A new search window opens. Enter a commodity code value in the **Code starts with...** field or a keyword in the **Description contains...** field. We recommend using one of the prefixes below to help narrow your search. Review a comprehensive list of what is included in each commodity by reviewing the [Who Buys What? page](#).

Commodity Category	Prefix	Examples
Maintenance, Repair, & Operations	MRO	Athletic equipment, promotional material, maintenance supplies and equipment.
Professional Services	PRO	Advertising, videography/photography, hospitality.
Technology and Software	IT	Online data storage, audio/visual equipment, software.
Scientific Products & Services	SCI	Translation/transcription services, medical supplies, laboratory parts and equipment

In this example, we are requesting landscaping services which is considered part of the maintenance, repair, & operations category. Enter “MRO” in the Code starts with... field and click **Search**.

**Commodity Code Search** ?

Code starts with... MRO

Description contains...

**Search**

BUY.IU returns a list of all MRO commodity codes. Click the **drop-down** next to **Results Per Page** and select “200” to see all results at once.

**Click to filter search results** ?

Results Per Page 20 ▾

**Results 91** Page 1 ▾ of 5 ?

		Description	
MRO01	20	Alcoholic Beverages	<a href="#">select</a>
MRO10		Cleaning & Janitorial Services	<a href="#">select</a>
MRO11		Cleaning & Janitorial Supplies	<a href="#">select</a>
MRO12		Coin Operated Self Service Laundry Equipment	<a href="#">select</a>
MRO13		Commencement Apparel (Rental)	<a href="#">select</a>
MRO14		Costumes & Accessories	<a href="#">select</a>
MRO15		Defense, Law Enforcement, Security and Safety Equipment & Supplies	<a href="#">select</a>
MRO16	200	Document Destruction (Shredding)	<a href="#">select</a>
MRO17		Document Storage (Physical)	<a href="#">select</a>
MRO18		Doormats & Rugs	<a href="#">select</a>
MRO19		Electrical Systems, Lighting, Equipment, Components & Supplies	<a href="#">select</a>
MRO2		Appliances & Kitchenware	<a href="#">select</a>
MRO20		Environmental Testing & Treatment Services	<a href="#">select</a>

You are now able to scroll through the list and locate the commodity code that best describes the items or services you are interested in purchasing. Click **select** next to the commodity code you wish to use to return it to your order.

In this example, we will select “MRO41 Landscaping Services, Landscaping Design & Snow Removal Services.”

Close

+ Click to filter search results ?

Results Per Page 200 Results 91 Page 1 of 1 ?

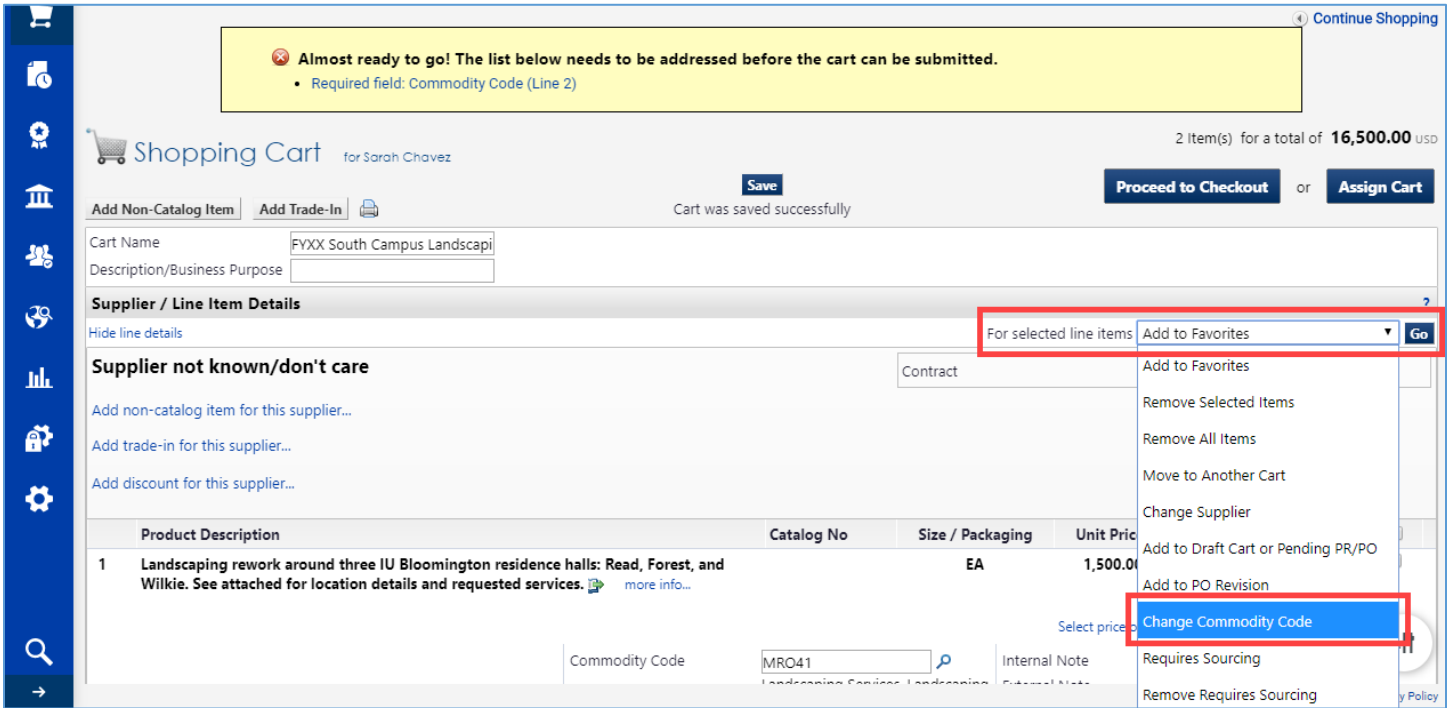
Code	Description	
MRO1	Alcoholic Beverages	<a href="#">select</a>
MRO10	Cleaning & Janitorial Services	<a href="#">select</a>
MRO11	Cleaning & Janitorial Supplies	<a href="#">select</a>
MRO38	Ice Melt, Road Salt, & Salt Softner	<a href="#">select</a>
MRO39	Lab Coats & Medical Uniforms	<a href="#">select</a>
MRO4	Bedding, Kitchen/Table Linens & Towels	<a href="#">select</a>
MRO40	Land, Buildings, Structures & Thoroughfares	<a href="#">select</a>
MRO41	Landscaping Services, Landscaping Design & Snow Removal Services	<a href="#">select</a>
MRO42	Laundry & Dry Cleaning Services	<a href="#">select</a>
MRO43	Laundry Products	<a href="#">select</a>
MRO44	Locks, Security Hardware & Accessories	<a href="#">select</a>
MRO90	Books & Periodicals	<a href="#">select</a>
MRO91	Floral - Events	<a href="#">select</a>
MRO92	Construction, Capital Projects - (For CPF Office Use ONLY)	<a href="#">select</a>

Results Per Page 200 Page 1 of 1

Back in the Shopping Cart, click **Save** to save your work.

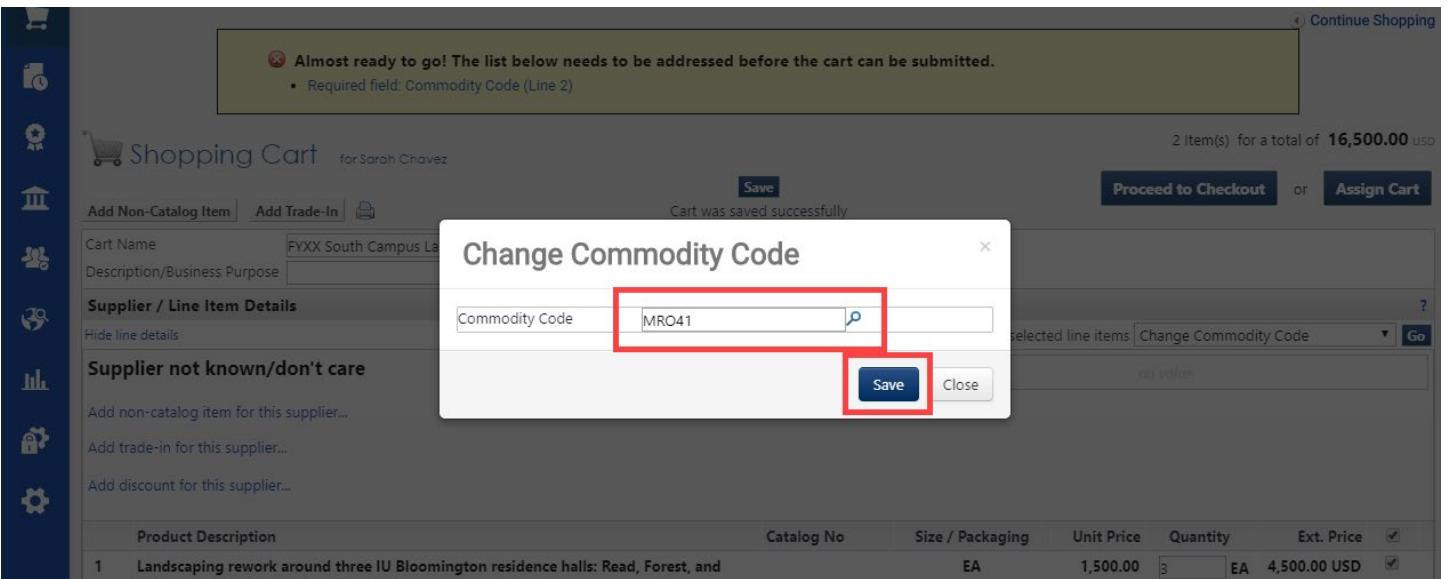
Now that you have identified which commodity code should be used, apply it to all lines of your order. Each line of the order must have a commodity code. **Check the box next to Ext. Price** to select all lines.

Next, select **Change Commodity Code** from the action drop-down menu, then click **Go**.



Type the commodity code you found previously in the field and click **Save**.

Commodity codes are case sensitive. Be sure to type it **exactly** as it appears in BUY.IU.



The commodity code has been applied to all lines.

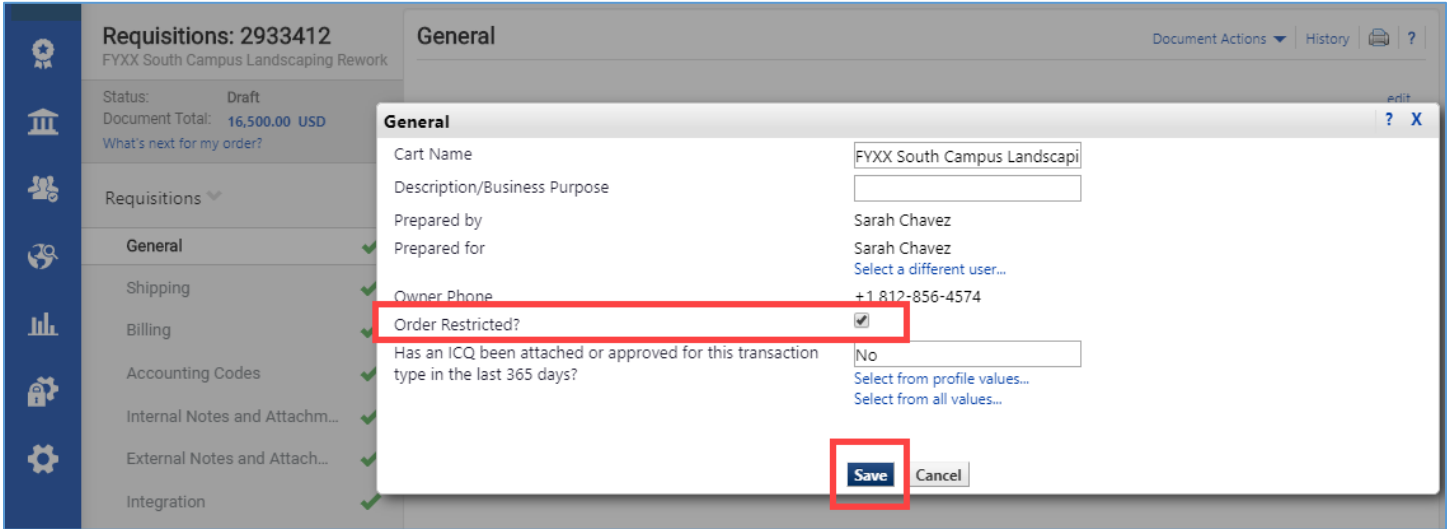


If you are purchasing a capital asset, check the **Capital Asset?** box next to the lines which will be capitalized. Additional information for the supplier may be added by clicking **add note...** next to **External Note**. Information entered in this section is displayed on the purchase order. Attachments will be added in the next step.

Once all information is entered, click **Proceed to Checkout** to begin review of the requisition.

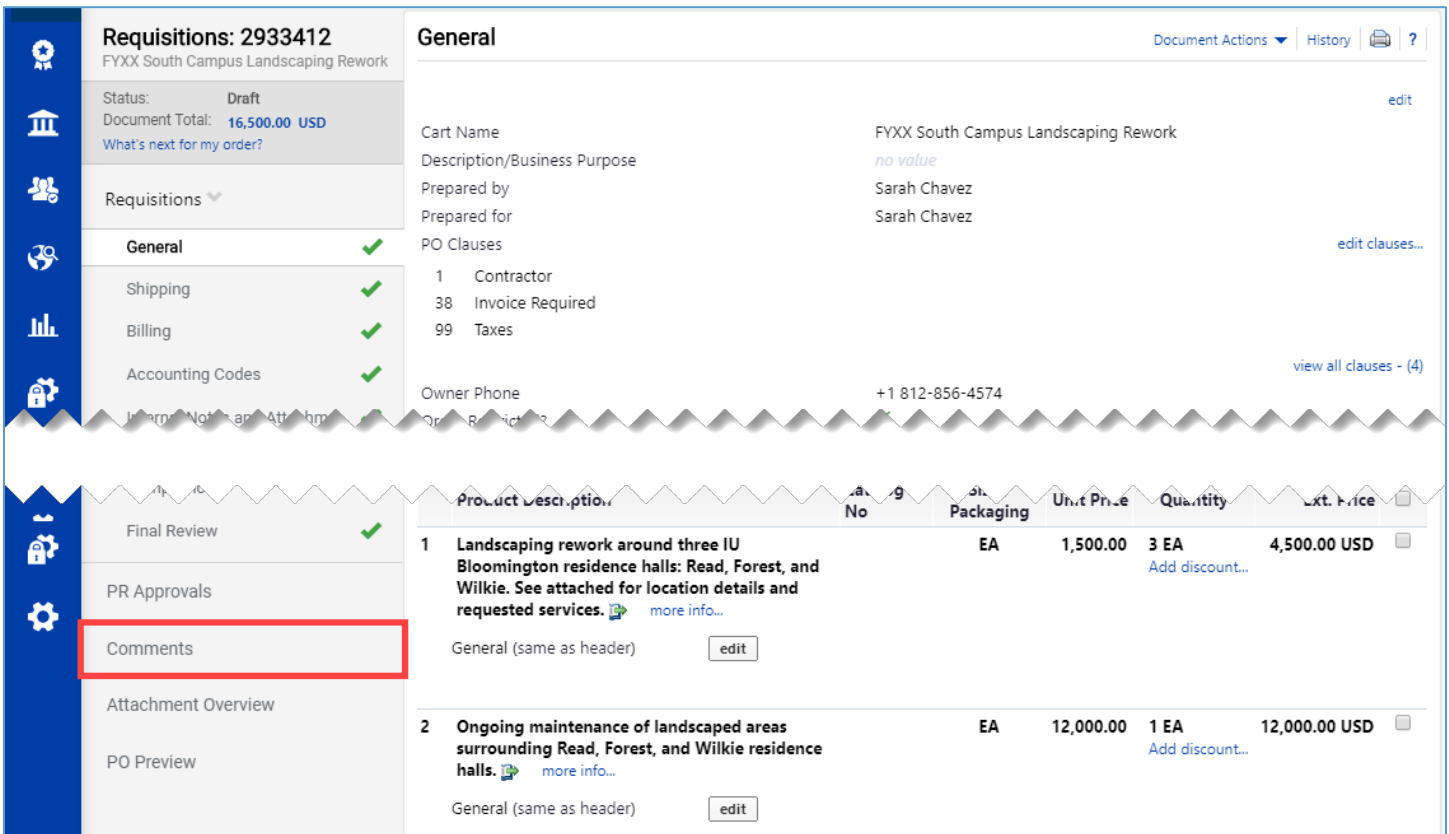
First, mark the order restricted. Navigate to the **General** section of the requisition and click **edit** in the upper right-hand corner to make changes.

Check the box next to **Order Restricted?** and click **Save**.



Next, check your shipping address in the **Shipping** section, and add funding information in the **Accounting Codes** section.

Finally, leave additional information for Purchasing or upload attachments in the **Comments** section. Comments are available in the lower part of the left-hand menu.



Click **Add Comment** to log a new comment.

**Requisitions: 2933412**  
FYXX South Campus Landscaping Rework

Status: **Draft**  
Document Total: **16,500.00 USD**  
What's next for my order?

Requisitions >  
PR Approvals  
**Comments**  
Attachment Overview  
PO Preview

**Comments** Document Actions History ?

Show comments for: Requisition

**Add Comment**

Records found: 0  
No comments have been added.

See configuration for this Document.

A new window appears. Include the following information in your comment, if applicable:

- Preferred suppliers – If you already have one or more suppliers in mind, list their names in your comment. If they are already a supplier in BUY.IU, include their supplier number which starts with a lowercase “p.”
- Overarching specifications – If your order must meet certain environmental or material standards, include those specifications here.
- Timeframe – If a project must be completed by a certain date or within a certain timeframe, include that information.

If you wish to upload an attachment, enter a name in the **File Name** field, then click **Choose File** to search for the file on your machine.

Once all information is entered, click **Add Comment** to save the comment to your order.

Double check your work! You are not able to delete a comment once logged.

**Add Comment**

This will add a comment to the document.

Email notification(s):  
 Sarah Chavez (Prepared by) <schavez2@iu.edu>  
[add email recipient...](#)

We have already requested information from several local landscaping companies, including Thrasher Landscaping, Go Go Green Gardening, and Leif's Retro Yards. We would prefer to work with one of those companies if possible. Attached are additional details about the requested work, including schematics of proposed landscaping plans.

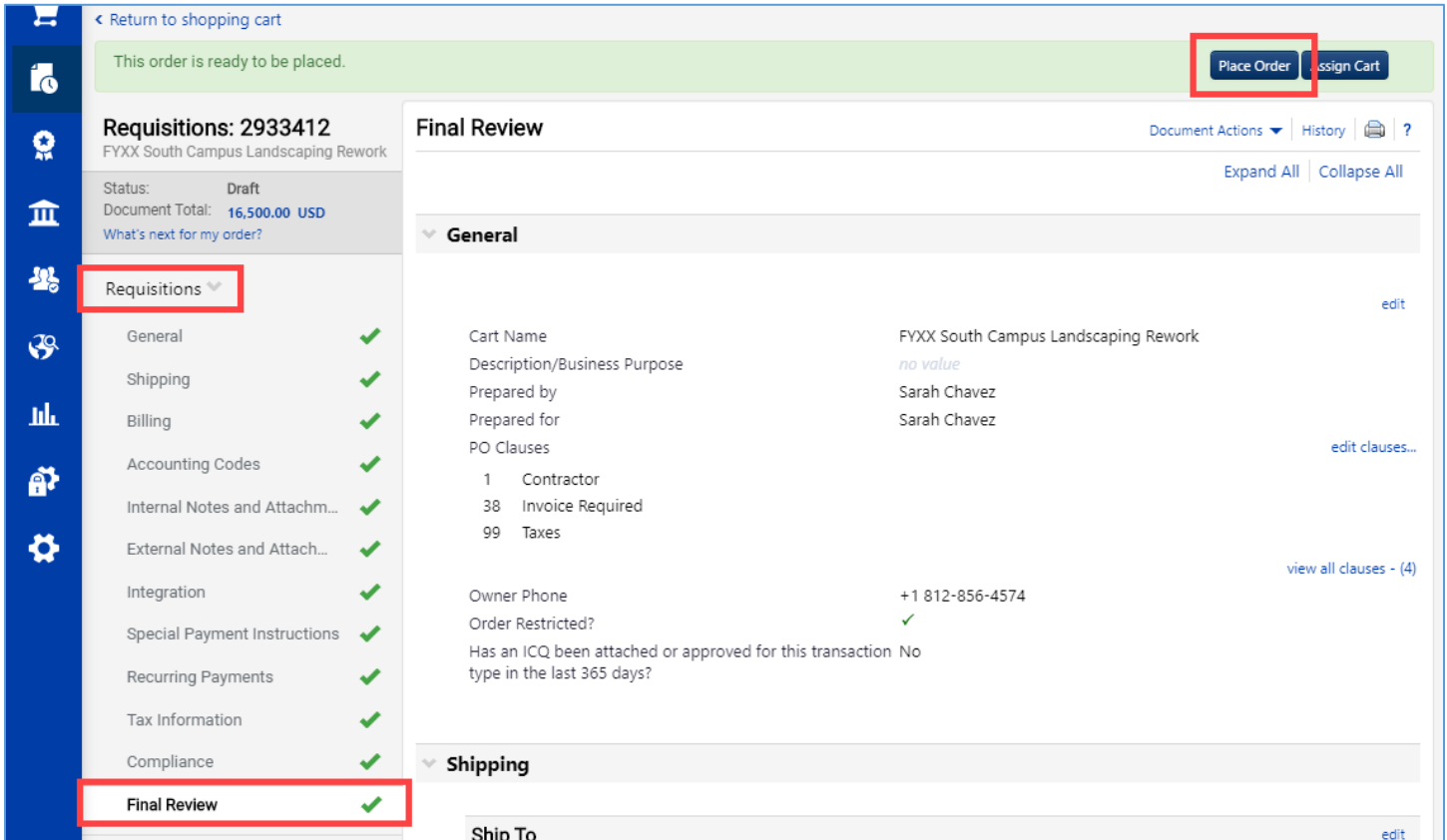
667 characters remaining

Attach file to this document (optional):

Attachment Type: File  
File Name: Landscaping Proposal  
File: [Choose File](#) Landscapin...Campus.png

**Add Comment** Close

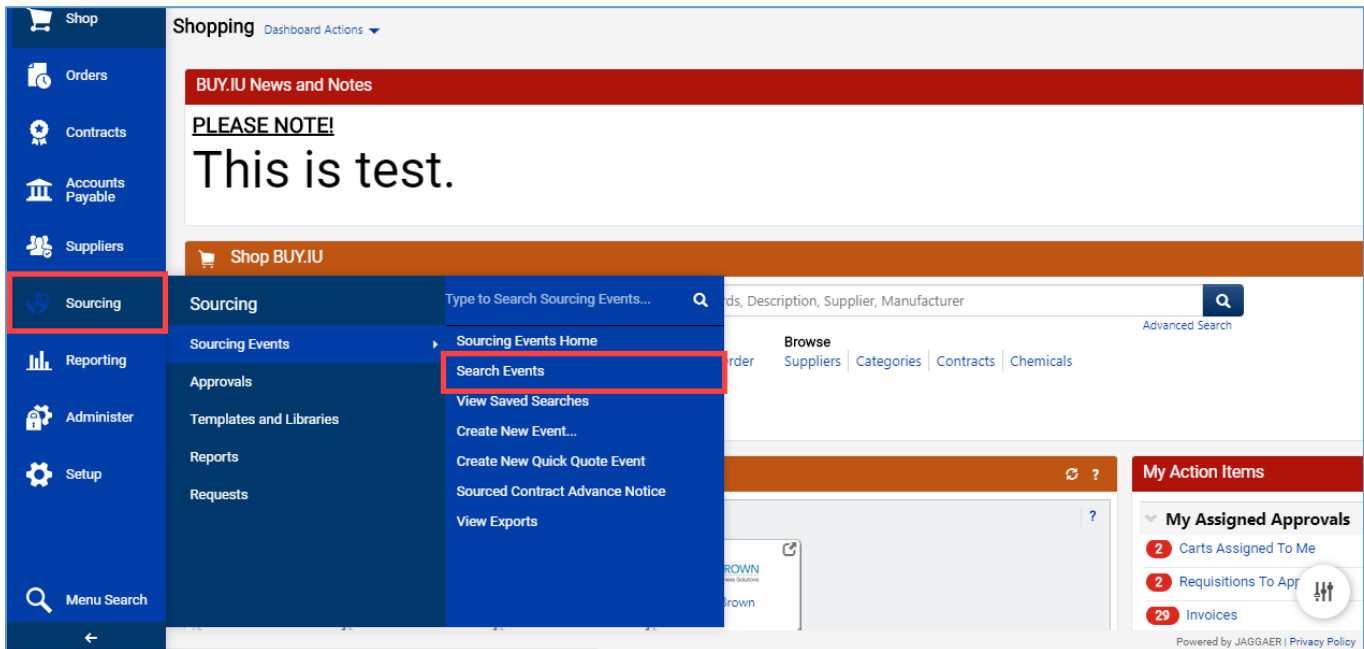
Click **Requisition**, then **Final Review**. Review your order one last time, then click **Place Order** to submit.



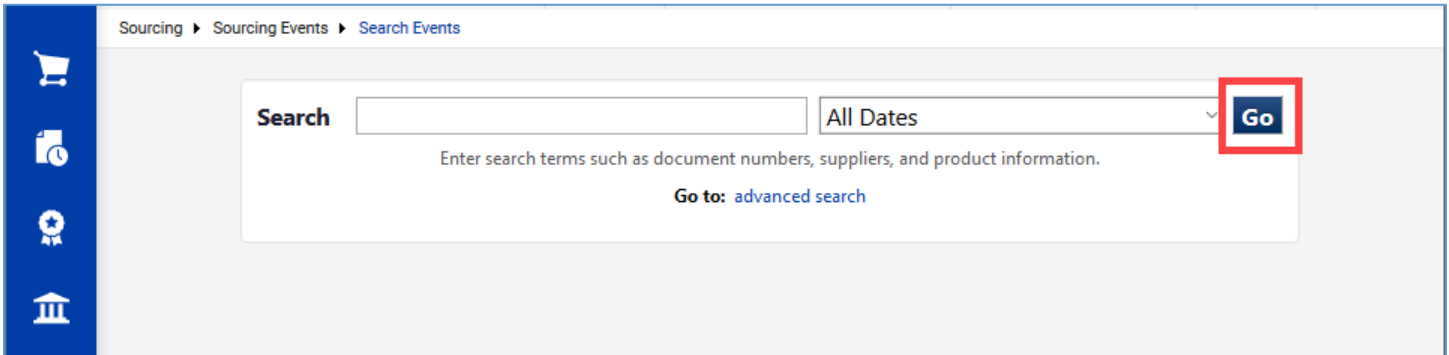
The requisition will route for review within your department and organization, then to Purchasing. Once received, Purchasing reviews the request and creates a sourcing event.

Sourcing is the mechanism used by Purchasing in BUY.IU to solicit quotes from suppliers. As the submitter of the requisition, you will be listed as stakeholder on the sourcing event and will be able to track its progress.

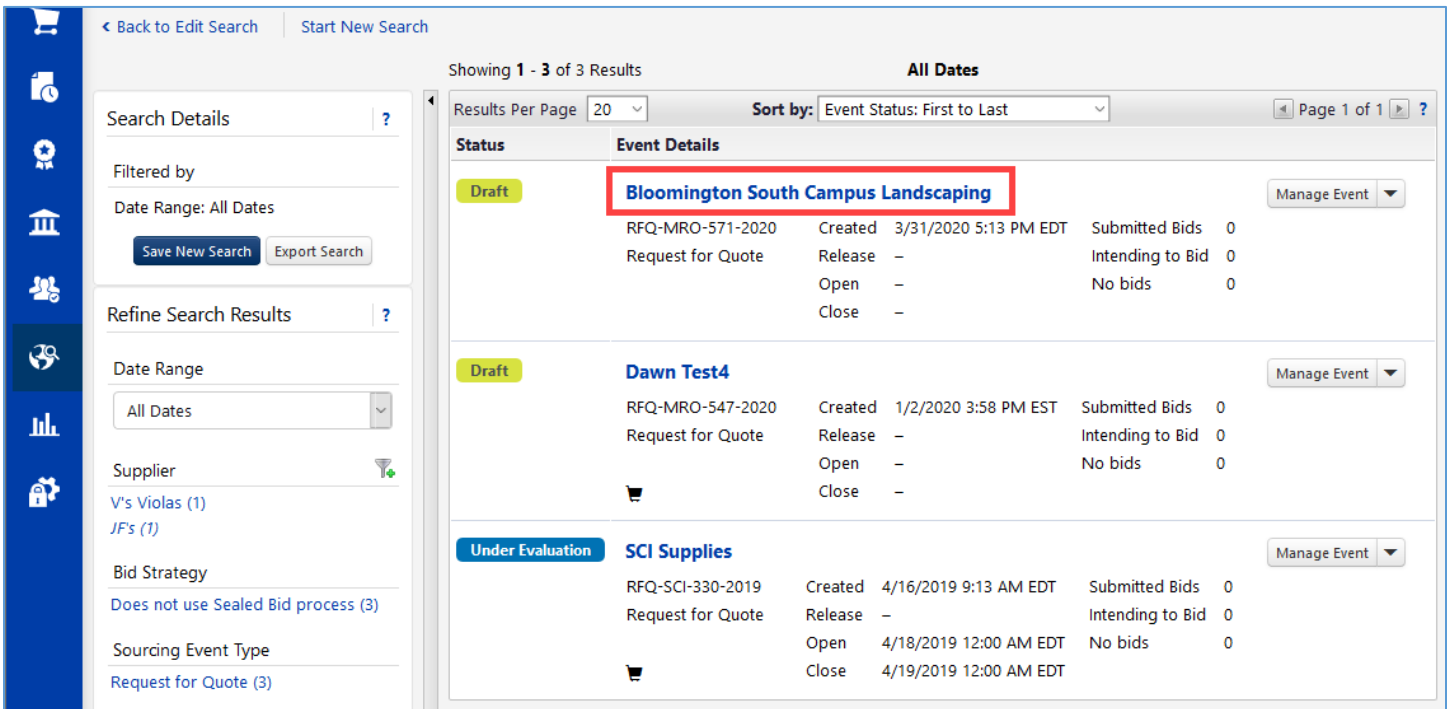
Locate a sourcing event by navigating to **Search Events** in the **Sourcing module**, part of the left-hand menu.



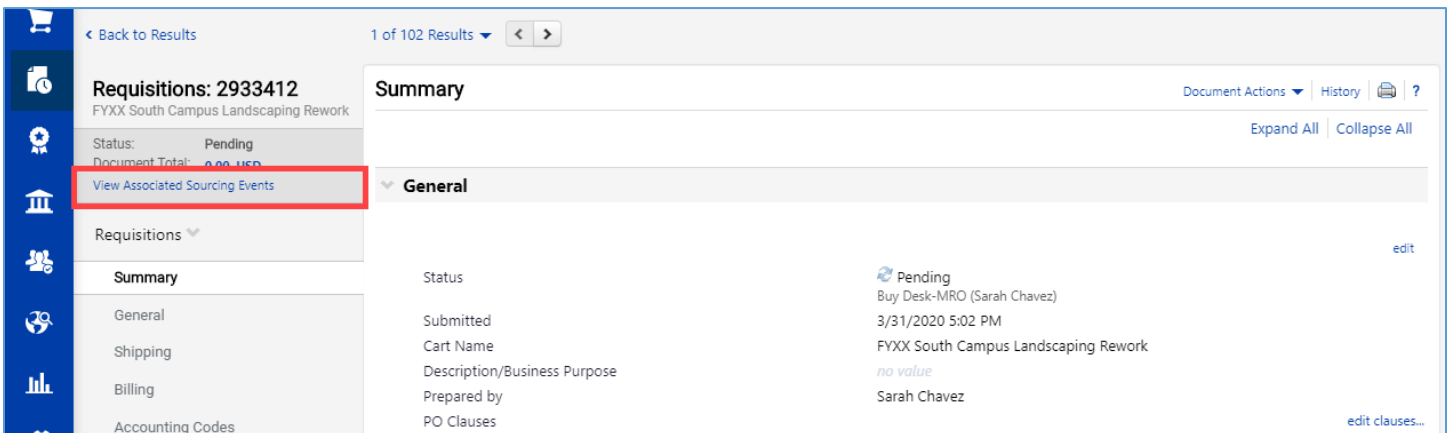
Click Go and BUY.IU returns a list of all sourcing events with which you are associated.



Click on the event name to see additional details.



Alternatively, you may also access the sourcing event by clicking View Associated Sourcing Events on the Requisition.



After the sourcing event is awarded, BUY.IU generates a new requisition using the information from the sourcing event. This new requisition automatically routes to the FO Approval workflow stop for review and approval. The original requisition moves to a status of “Completed.”