

When Purchasing Capital Equipment and you have to purchase more than one piece of equipment from a specific vendor and the equipment is equal to or greater than \$5,000 each, you must complete a Sole Source and a “non-catalog” together. To make this determination you need to first identify what is Capital Equipment (\$5,000 or more) versus Minor Equipment (< \$5,000).

1. Looking at your quote you need to first identify Capital Equipment:
  - a. Capital Equipment (items \$5,000 or more) on your quote.
  - b. Be sure to include installation, training and shipping costs in the cost of the equipment. Exclude warranties and software (unless software is valued at \$100,000 or more per license).
    - a. If “total cost” is \$5,000 or greater then you have to utilize the correct accounting code for capital equipment. (Please see reference at the end of these instructions)
    - b. Mark these items with a “C” (Capital Equipment) so you will know before starting your requisitions
  
2. Looking at your quote identify Other items on quote.
  - a. Even if you are not purchasing any other minor equipment but quote involves other items that are not to be included as Capital Equipment cost but is included on quote these items will need to be included on the Sole Source form.
  - b. Example, other items such as warranty cost, small equipment that is need but not tied to Capital Equipment Cost, etc.
  - c. Mark these items “M” (Minor Equipment) so you know before starting your requisition.

## Steps to Complete both of these items together:

1. Make sure your active cart is empty.
2. Click on Sole Source Justification under “Showcased Services”
3. Complete the Sole Source form as usual, except only include Line Items that you marked with “M”.
4. When Completed add to cart, when you add to cart your total should match the items you identified on your quote as Non-Capital Equipment

The screenshot displays the Ball State University SciQuest shopping interface. The browser address bar shows the URL: <https://solutions.sciquest.com/apps/Router/Home?tmstamp=1530519803314>. The page features a red navigation bar with the Ball State University logo, a search bar, and a shopping cart icon showing 0.00 USD. Below the navigation bar, there is a search bar with the text "Shop Everything" and a "Go" button. The page also includes a sidebar with "Notifications/Updates" and "SciQuest Training Material" sections. A red arrow points to the search bar with the number "1" next to it.


**BALL STATE UNIVERSITY**
Angie Boyle ▾ ☆ 6 201 0.00 USD Search (Alt+Q) ?

Shop > Shopping > Shopping Home ▾ > Home/Shop Logout

Shop

Go to: [advanced search](#) | [favorites](#) | [forms](#) | [non-catalog item](#) | [quick order](#)   
 Browse: [suppliers](#) | [categories](#) | [contracts](#) | [chemicals](#)
[Manage Showcases]

**Notifications/Updates**

- Central Stores is Closed and will Open on June 30, 2018
- Office Depot Training [Video](#)

**SciQuest Training Material**

- How to Shop [Ball State University Central Stores](#) Catalog
- Searchable Key Words for [Ball State University Central Stores](#)
- How to Change [Shipping Address](#) for SciQuest Order
- Recent Slide presentation in regards to [SciQuest Updates](#)
- All purchase orders with a total amount over

> **Ball State University** ?

> **Showcased Suppliers** ?

▾ **Showcased Services** ?

Equipment Request - B24

Sole Source Justification

Move Request - B450

Courier Request Form

Supplier Request

Non PO Payment Request Form

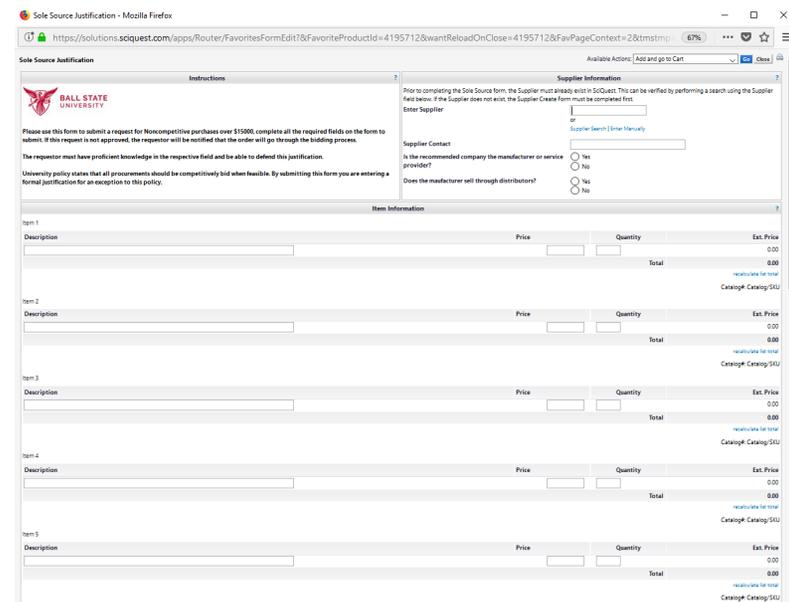
Wire Request Form

2. 

• Sole Source Form will open and you complete all Required fields.

3. 

• Directions to Sole Source Form can be found here.



**Sole Source Justification - Mozilla Firefox**

<https://solutions.sciquest.com/apps/Router/FavoritesFormEdit?FavoriteProductId=4195712&wantReloadOnClose=4195712&favPageContext=2&tmstmp:>

**Sole Source Justification**

**Instructions**

Please use this form to submit a request for Noncompetitive purchase over \$15000, complete all the required fields on the form to submit. If this request is not approved, the requestor will be notified that the order will go through the bidding process.

The requestor must have proficient knowledge in the respective field and be able to defend this justification.

University policy states that all procurements should be competitively bid when feasible. By submitting this form you are entering a formal justification for an exception to this policy.

**Supplier Information**

Prior to completing the Sole Source form, the Supplier must already exist in SciQuest. This can be verified by performing a search using the Supplier Search below. If the Supplier does not exist, the Supplier Create Form must be completed first.

Enter Supplier:

or

Supplier Contact:

Is the recommended company the manufacturer or service provider?  No  Yes

Does the manufacturer sell through distributors?  No  Yes

**Item Information**

Item	Description	Price	Quantity	Ext. Price
Item 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total				0.00
<a href="#">View Item Details</a> <a href="#">View Item Details</a> <a href="#">View Item Details</a>				
Item 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total				0.00
<a href="#">View Item Details</a> <a href="#">View Item Details</a> <a href="#">View Item Details</a>				
Item 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total				0.00
<a href="#">View Item Details</a> <a href="#">View Item Details</a> <a href="#">View Item Details</a>				
Item 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total				0.00
<a href="#">View Item Details</a> <a href="#">View Item Details</a> <a href="#">View Item Details</a>				
Item 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total				0.00
<a href="#">View Item Details</a> <a href="#">View Item Details</a> <a href="#">View Item Details</a>				

## Adding Capital Equipment to Sole Source

1. Make sure you see your dollar amounts in your cart that you applied to sole source.
2. Next Click on Home and then on “non-catalog.
3. When non-catalog window appears select the same supplier you utilized on your Sole Source.

The screenshot shows the Ball State University shopping portal. A red navigation bar at the top contains a home icon (labeled '2.'), the university logo, and a search bar (labeled '1.'). Below the navigation bar is a breadcrumb trail: Shop > Shopping > Shopping Home > Home/Shop. A search bar with 'Everything' selected and a 'Go' button is visible. Below the search bar are links for 'Go to: advanced search | favorites | forms | non-catalog item | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. A 'Ball State University' dropdown menu is also present (labeled '3.').

When non-catalog window appears you first need to select same Supplier you utilized on

The screenshot shows the 'Non-Catalog Item' form. It has a title bar with a question mark and a close button. The form contains the following fields and sections:

- Enter Supplier**: A text input field with a search icon and the text 'or Supplier Search' below it. An arrow points to this field.
- Product Description**: A large text area with a character count '254 characters remaining' and 'expand | clear' links.
- Catalog No.**: A text input field.
- Quantity**: A text input field.
- Price Estimate**: A text input field.
- Packaging**: A dropdown menu with 'EA - Each' selected.
- Product Details**: A section with checkboxes for various attributes:
  - Commodity Code: [input field]
  - Manufacturer Name: [input field]
  - Manufacturer Part No: [input field]
  - Controlled substance
  - Recycled
  - Hazardous material
  - Radioactive
  - Rad Minor
  - Select Agent
  - Toxin
  - Energy Star
  - Green
- Buttons**: 'Save and Close', 'Save and Add Another', and 'Close'.

## What Account Codes should I use?

733210-Minor Equipment – for non-computer equipment valued at less than \$5,000 per item

734025-Computer Purchases – for computers valued at less than \$5,000 per item

734020-Computer Software Purchased – for software valued at less than \$100,000 per license

739010-739150 - Account Codes in this range are typically used with plant funds (9xxxxx range).

If you are not responsible for entering a PR against a plant fund, please do not use Account Codes in the 739xxx range

A complete list of account codes can also be found.....