Request Non-Catalog Items

- Request Goods
- Request Service

And then on Request Non-Catalog Items

Type in the search bar OR

Click on the Purchase App

Welcome, Fernanda Wetzel Amaral

Announcements

Applications

Purchase

Pay

Inbox

Time

Catalog

Settlement

Goods

Procurement

Request Non-Catalog Items

Connect to Supplier Website

Add from Templates/Requisitions

Select from My Procurement Favorites

More (2)
Choose Requisition Type and Funding

- Choose based on items being requested.
- Most common:
  - One Time Goods or Services Purchase
  - Machinery and Equipment Tax Exempt

Choose appropriate Project, Program, Gift or Grant worktag.

Cost Center, Fund, Function, Region, and Additional Worktags should auto-fill.
Fill out all required fields
(see next slide for example)

• Request Type: “Request Good” or “Request Service”

• Good Request Details:
  ▪ Item Description
  ▪ Spend Category
  ▪ Supplier (if available)
  ▪ Quantity
  ▪ Unit Cost
  ▪ Unit of Measure
  ▪ Memo

REPEAT FOR AS MANY SUPPLIERS OR ITEMS AS NECESSARY. WHEN DONE, VIEW CART AND Checkout

Add to Cart
Searchable Field, common spend categories:
• SC00038 Office Supplies
• SC00039 Computer Equip Non-Inventoriable
• SC00040 Instruction/Lab/Medical Supplies
• SC00041 Supplies and Materials
• SC00049 Food
• SC00053 Postage
• SC00091 Membership Dues
• SC00092 Conference Registration Fees

Add comments to ease the purchase process:
• Shipping information
• URL
• Product catalog number
• Specific Instructions

When ready to checkout, click on the cart and then on Checkout.
Checkout

• Shipping Address and Requisition Information: will repeat from last step.

• Goods: will be separated by lines, scroll to the right to see everything (next two slides).
  • Add the Tax Code based on the destination of the goods.

• Attachments: attach any supporting document (e.g., quote, e-mail, bids, sole source, freeze exempt, tax exempt).
Most of the items in the Goods Line will auto-fill

- If purchase type is Machinery and Equipment Tax Exempt, make sure to select M&E Tax Exempt
- If Item is Non-Taxable, leave Tax-Code blank.

Enter Catalog, ASIN, Merchant, etc. Number used by supplier to identify the item.

Tax Code is based on the destination of the goods/service.

If the Supplier is not selectable (i.e., not recognized in Workday), they must be paid using a Pcard. Alternatively, we need to request to add them as a supplier to Workday, which may significantly delay the purchase process.
Most of the items in the Goods Line will auto-fill

Use this to split the total amount among multiple funds. See next slide for instructions.
Split Funding on the request must be done on each line item

Update funding: Project/Program/Gift/Grant

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<td><strong>Memo</strong></td>
<td><strong>Project</strong></td>
<td><strong>Program</strong></td>
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Special Note: If you are completing a request for Machinery and Equipment Tax Exempt a questionnaire will be available once you submit. The questionnaire has replaced the previously required Tax-Exempt Request Form.