Procurement:
CREATE A PROCUREMENT REQUEST
### Non-Catalog (Goods)

## CREATE A PROCUREMENT REQUEST – Non-Catalog (Goods)

You can create a procurement request to order goods and services. A separate procurement request should be created for each supplier. If a supplier has additional information or ordering instructions, this can be viewed in the Supplier's information by clicking on the Notes Tab.

From your home page:

1. Enter *create requisition* in the Search bar. Choose the *Create Requisition Task.*
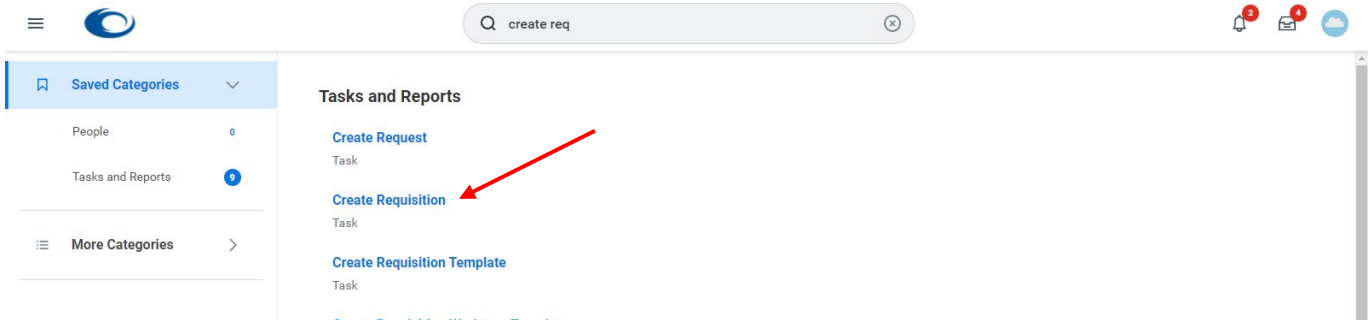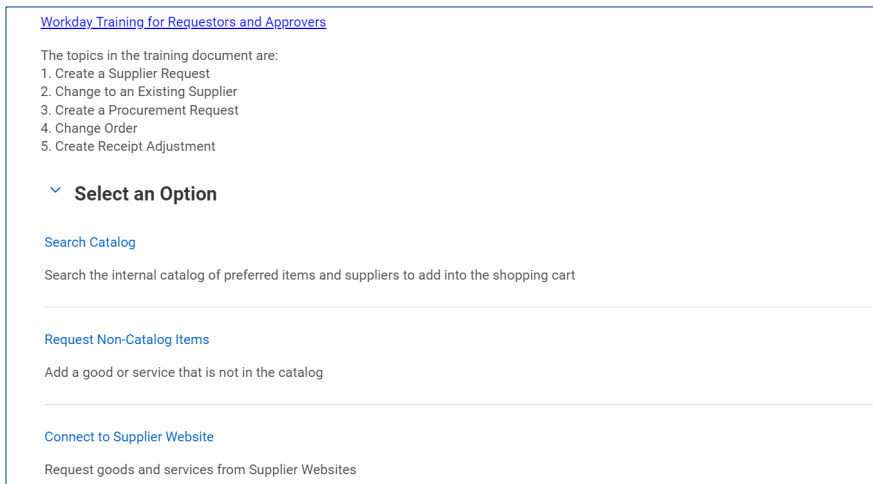

2. Confirm your *Requester (name), Company, and Currency*. The requester must be yourself.
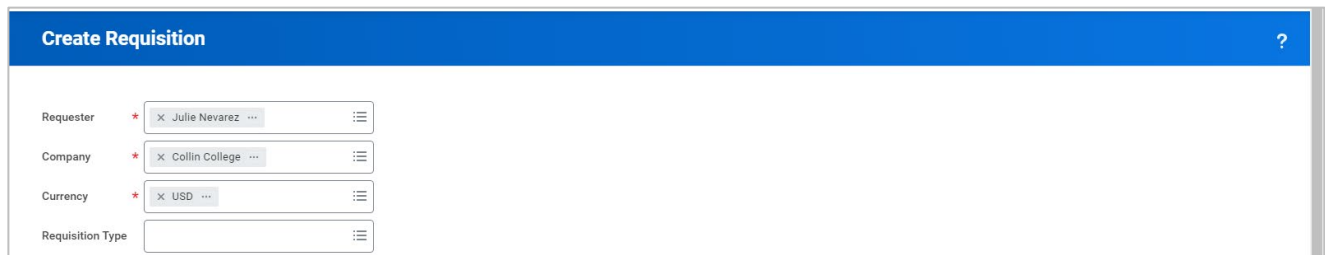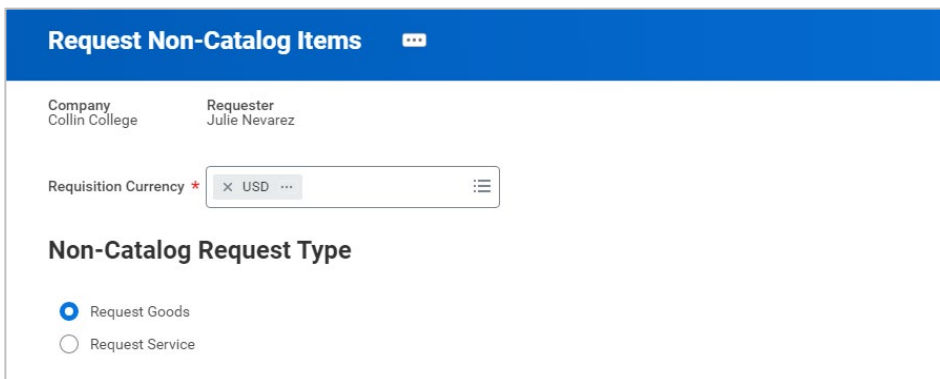

3. *Requisition Type* is optional at this point but will be required later in the process. (See Appendix A.)

4. The *Deliver-To* and *Ship-To* (address) will auto-populate after being used. Confirm that this is the correct Deliver-To/Ship-To. Making a "Ship-To" choice at the header is the only opportunity to make a selection that will be sent to the supplier. Making a change at the line level will NOT be sent to the supplier. The Deliver-To does not go out to the supplier. It is for internal purposes or desktop delivery.
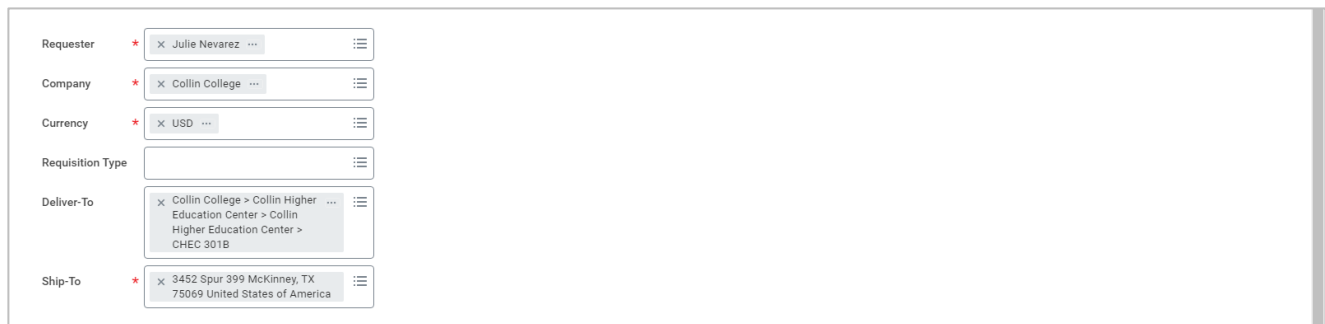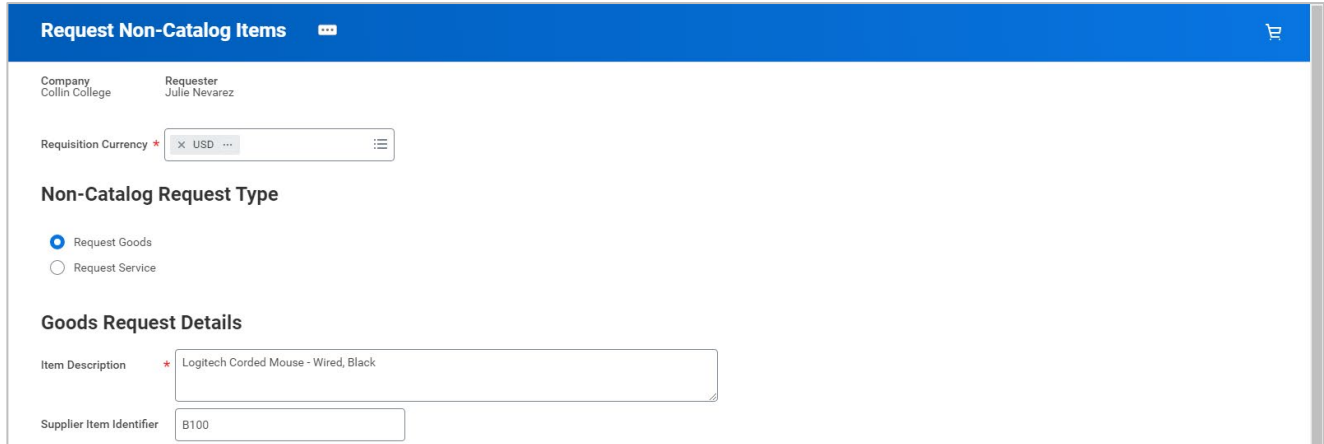
5. After using Cost Center, it should auto-populate. *Additional Worktags* should auto-populate when the *Cost Center* or *Grant* is entered. To change the Cost Center, Click on the x to the left of the existing Cost Center then enter or select a cost center. If using a Grant or Project, do not enter the Cost Center. Grant and Project will update cost center and all other Worktags.

6. Click on the **OK** button at the bottom left.

7. There are three methods to make a purchase:
    a. Search Catalog (for Voss Lighting, Filter Systems and Einstein Printing)
    b. Request Non-Catalog Items (for goods or services)
    c. Connect to Supplier Website (punchout)

    Workday Training for Requestors and Approvers

    The topics in the training document are:
    1. Create a Supplier Request
    2. Change to an Existing Supplier
    3. Create a Procurement Request
    4. Change Order
    5. Create Receipt Adjustment

    ⌄ **Select an Option**

    Search Catalog

    Search the internal catalog of preferred items and suppliers to add into the shopping cart

    Request Non-Catalog Items

    Add a good or service that is not in the catalog

    Connect to Supplier Website

    Request goods and services from Supplier Websites

8. For this demonstration, Click on the Request Non-Catalog Items link.

9. At this point you must choose by Clicking on the radio button whether this will be a

    a. Request Goods is the default and should be used for monthly services where the monthly payment is the same amount or for the purchase of goods.

    b. Request Service. The Request Service is chosen for an open purchase order. It can also be used for maintenance or repair.

    Request Non-Catalog Items ···

    Company
    Collin College

    Requester
    Julie Nevarez

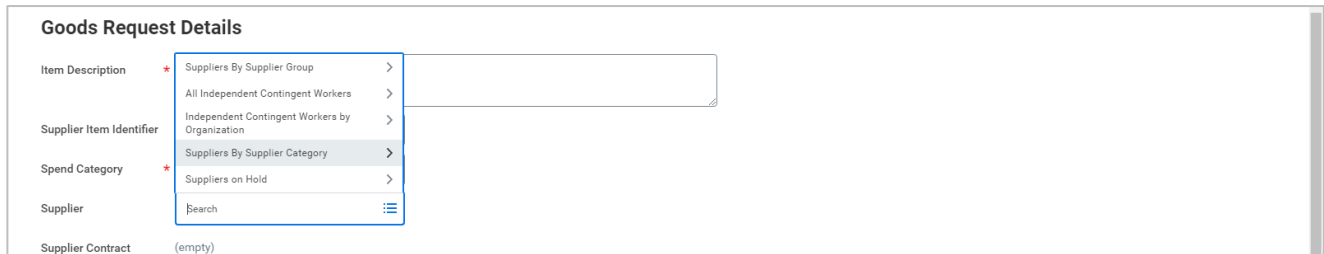   Requisition Currency * | ✕ USD ··· | ☰

    Non-Catalog Request Type

    ⦿ Request Goods
    ◯ Request Service

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10. Click in the Item Description field and enter a complete product description including the Manufacturer.

11. Supplier Item Identifier field, **DO NOT USE**.

12. Click on the three dashes to the right of the Supplier field and make a choice such as Suppliers By Supplier Category by Clicking on the right pointing caret. This is a required field even though it does not have an asterisk. You will receive a red Error if you do not select a Supplier and will not be able to proceed.

13. Search for or enter a Spend Category (similar to Account), such as SC1017 General Supplies. You can type your category to search. **See Appendix B**. If you know the Spend Category, you can start typing the name in the search field and enter to search.

> **Note:** SC1229 Software IT Arrangements (SBITA) is used for Cloud-Based IT software & licensing/long-term agreements (SBITA).
>
> SC1230 is used if warranty/support service is optional. Use (SC1045 / SC1074 / SC1079 / SC1229) if required for purchase, as a separate line item.

14. Click on the right pointing caret to the left of a letter of the alphabet.

15. Scroll to your supplier of choice and click on the radio button to the left.

16. Click on the three dashes to the right of Supplier Contract to search for a supplier contract.

17. Enter a Quantity.

18. Enter the Unit Cost.

19. Enter or select the Unit of Measure.

20. Click on the Add to Cart button at the bottom left. You will get an Added to Cart message and the cart in the upper right corner will have a number in an orange circle.

21. The Request Non-Catalog Items form will be visible for you to continue adding items to your cart, or you can review your cart by clicking on the **Cart** 🛒 icon.

22. Click on the **Checkout** button to proceed.

23. Click on the red box to see the Error(s).
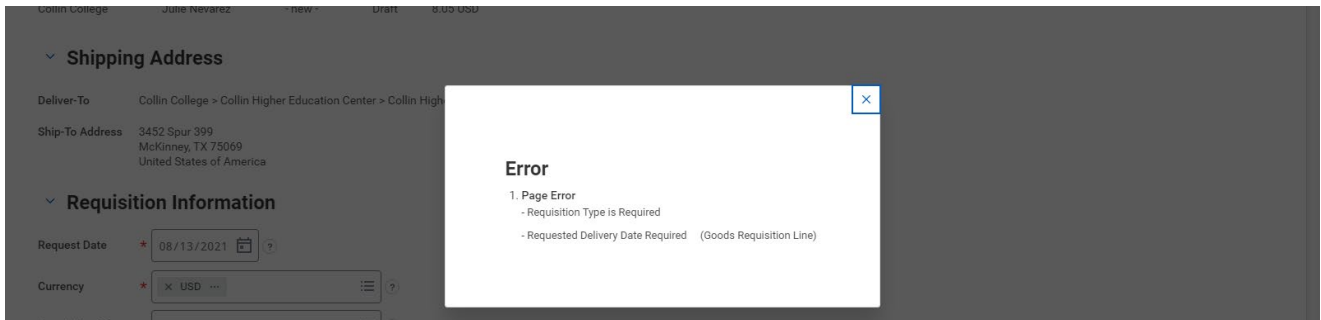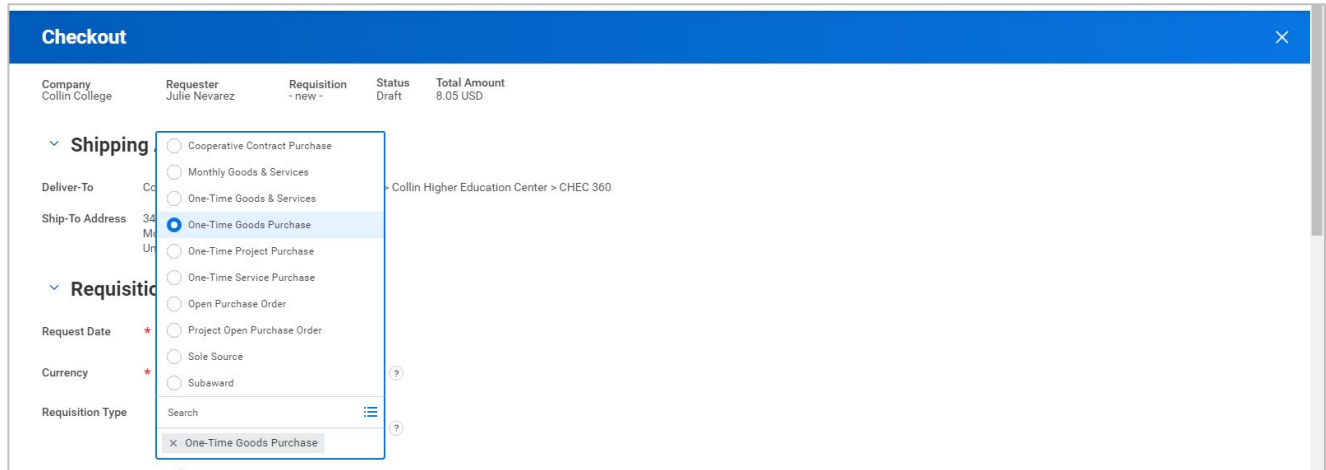
24. If there are Error(s) there will be a red box at the top and a Help Available pop up. You can Click on the Show Me button to get informational question marks beside each field.
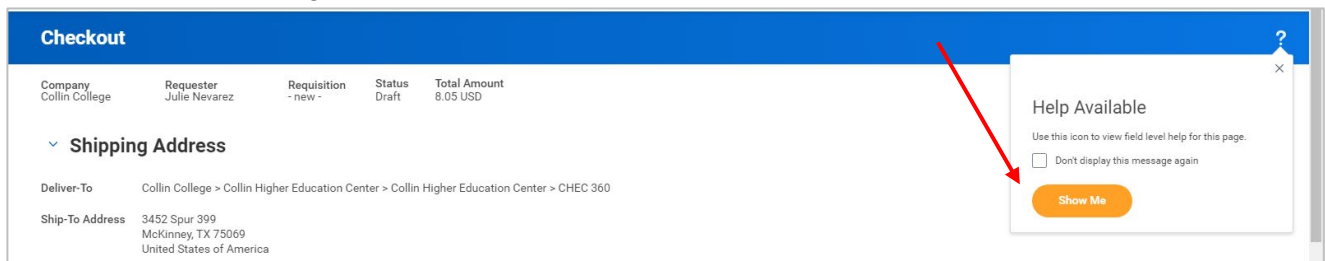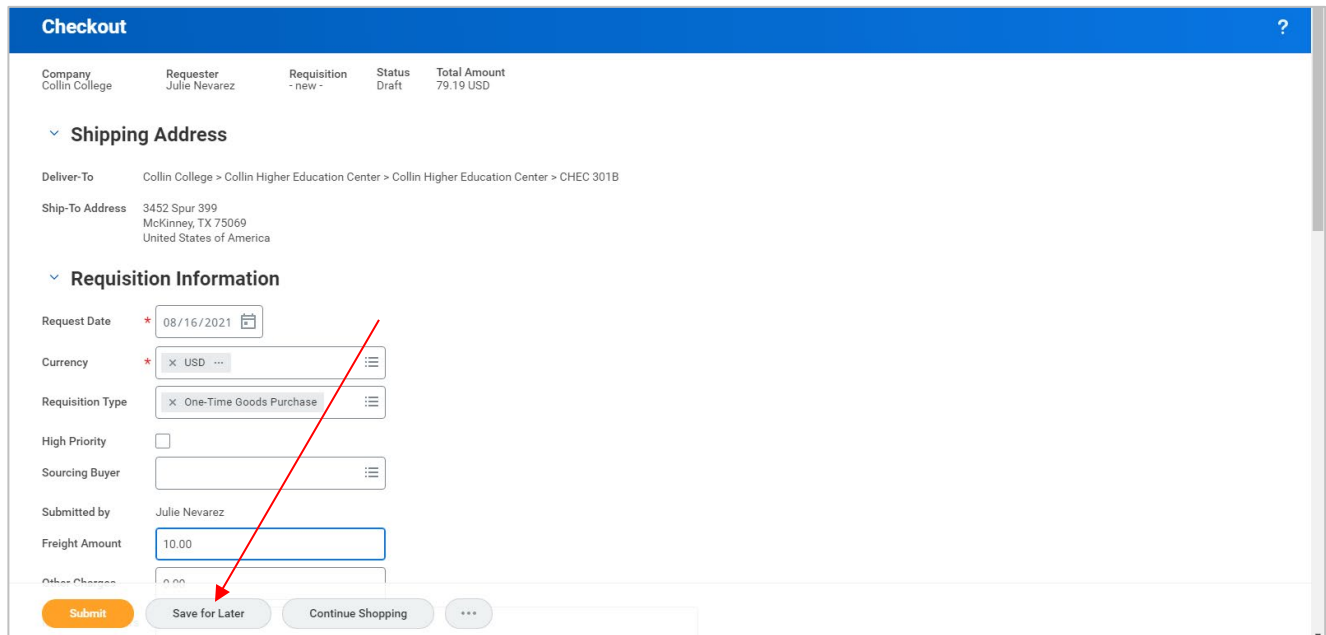
25. Enter or choose a Requisition Type. See Appendix A for Requisition Type Description. This is a required field even though it does not have an asterisk. You will receive a red Error if you do not

select a Requisition Type and will not be able to proceed.
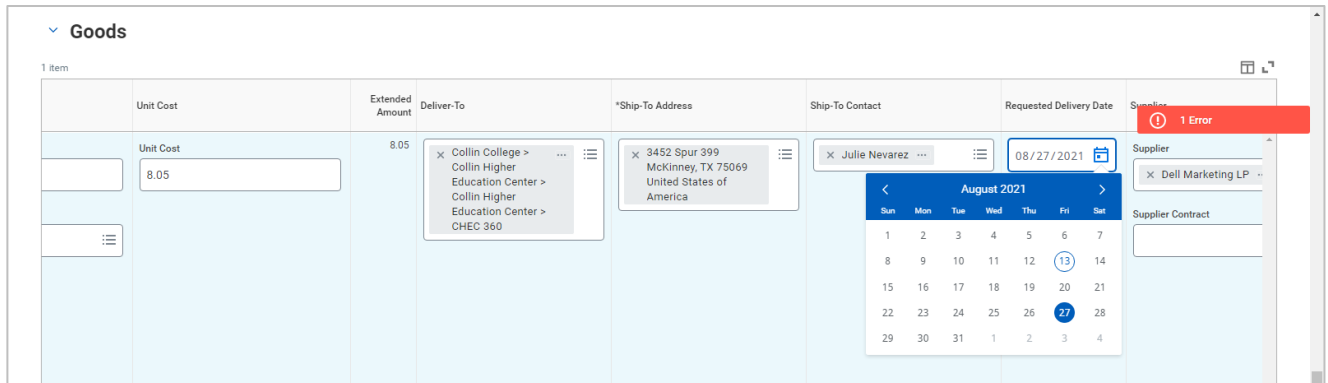
26. If the shipping amount is known, enter it into the Freight Amount field at the header level. If the freight is known and is not entered, the Purchasing Sourcing Buyer will return the requisition to Requester for correction.

27. An Internal Memo stating the business purpose for ordering promotional items is required when submitting a requisition. An error message will be displayed stating: Promotional Items Require An Internal Memo Stating The Business Purpose.

28. Scroll down to the Goods line(s) and to the right to see the Requested Delivery Date. Enter or choose a delivery date from the calendar widget. It is suggested that you give at least a two week out date to allow time for approvals and supplier delivery.

29. Only one Ship-To Address on the Goods and Service lines should be used per requisition. If items should be shipped to different locations, a separate requisition should be entered for each location. If a quote is received for these items, a separate quote should be requested from the supplier for each requisition.
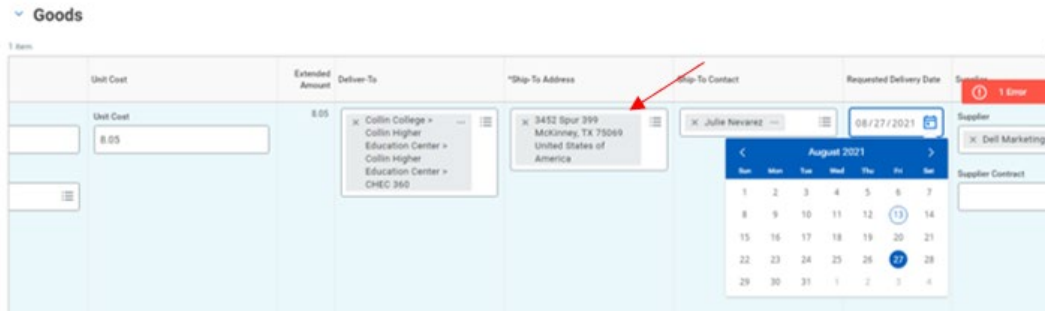
30. If there are multiple locations for a supplier, choose a supplier location from Order-From Connection.
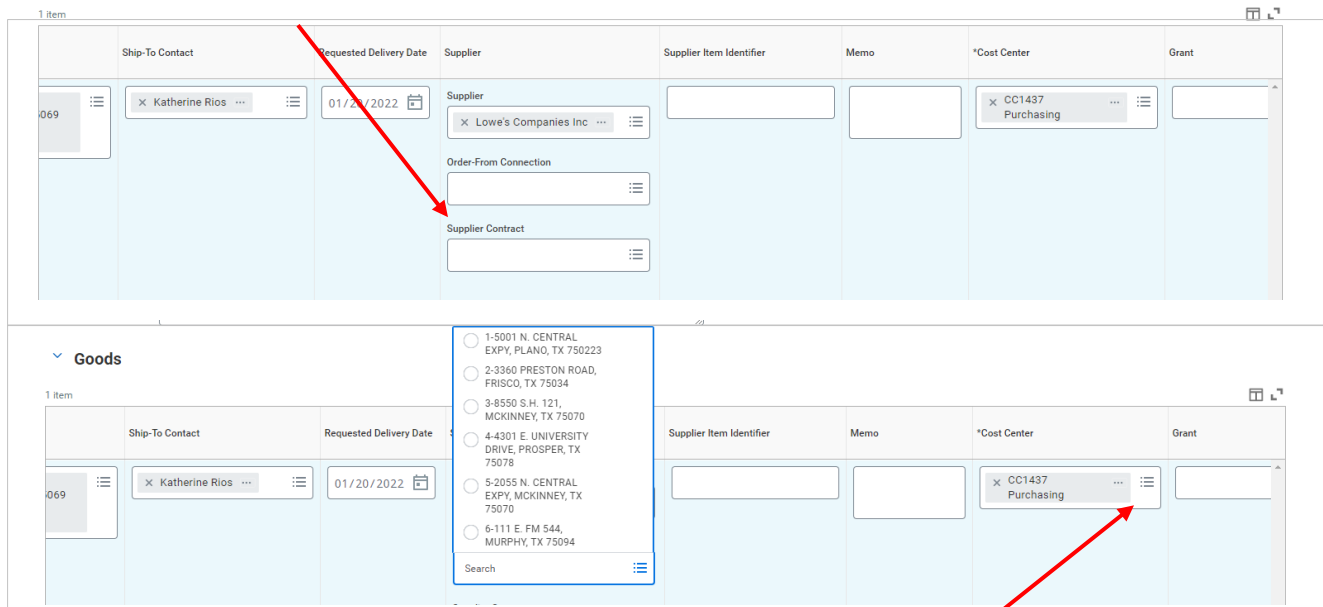
31. Different Cost Centers can be used for one item by entering a line item for each Cost Center and splitting the amount on each line to equal the total amount. Click on the 3 dashes at the Cost Center Column to change the Cost Center for each line item.

32. When using Spend Category SC1001 or SC1045, the Transaction Detail Worktag for Capital and Non-Capital Equipment is required. (See Appendix C) To add the Transaction Detail Worktag for above or below $5k, click on the three lines, select Transaction Detail: Equipment $5k or above or Transaction Detail: Equipment under $5k. This will need to be added to every line.

Supplier Item Identifier	Memo	*Cost Center	Grant	Project	*Additional Worktags	Splits
	TEST	× CC1437 Purchasing			× Campus: CA14 Districtwide × Division: DV40 Administrative Services × Fund: FD100 Unrestricted × Location: Collin College > Collin Higher Education Center Program: PG350	0

33. Click on the right pointing caret to the left of Attachments to add required quotes or agreements.

> Attachments

Activity (0)

Type "@" to tag someone.   Post

34. The Activity field can be used to send a message to a system user by using an @ symbol and searching for the user.

35. Requisition defaults can be edited by selecting Edit Requisition Defaults from the related actions menu.

| | Item | Shirts | × SC1017 General Supplies | Quantity * | Unit Cost | 100.00 | × Colli Colli |

Edit Requisition Defaults
Edit Address
Cancel

∨ Services

Submit   Save for Later   Continue Shopping   •••

36. Click on the Submit button at the bottom left.

37. Your requisition number, your name, the date, and the amount will be displayed at the top. Click on the right pointing caret to the left of Details and Process to view the details.

You have submitted   Requisition: REQ-100075, Requester: Julie Nevarez, Date: 08/13/2021, Amount: $8.05 •••

Up Next

Check Budget (Financial) for Requisition - Batch/Job: Run Budget Check

∨ **Details and Process**

For	REQ-100075
Overall Process	Requisition: REQ-100075, Requester: Julie Nevarez, Date: 08/13/2021, Amount: $8.05
Overall Status	In Progress
Due Date	08/27/2021

Details   Process

38. Click on the Process tab and scroll down to see the Remaining Processes button. When you Click on this button you can see the approvals.

Process	Step	Group	Person
Requisition Event	Approval by Principal Investigator (Grant) (All)	Principal Investigator (Grant)	
Requisition Event	Approval by Grant Manager (All)	Grant Manager	
Requisition Event	Approval by Project Manager (All)	Project Manager	
Requisition Event	Approval by Project Manager Level 2 (All)	Project Manager Level 2	
Requisition Event	Approval by Cost Center Manager Level 2 (All)	Cost Center Manager Level 2	Michael Dickson
Requisition Event	Approval by Cost Center Manager Level 2 (All)	Cost Center Manager Level 2	Michael Dickson
Requisition Event	Approval by Award Contract Specialist	Award Contract Specialist	Jana Walker / Nicole Lohse-Liu
Requisition Event	Approval by Spend Category Manager (All)	Spend Category Manager	
Requisition Event	Approval by Business Asset Tracking Specialist	Business Asset Tracking Specialist	Christine Lin / Lenora Gray

View Remaining Process   Requisition: REQ-100075, Requester: Julie Nevarez, Date: 08/13/2021, Amount: $8.05

Turn on the new tables view

Remaining Process 15 items

Note: When your requisition has been approved there will be a Notification (the bell at the top right) indicating the Purchase order has been created. When you Click on the bell, you will see the notifications on the left. Once you have read the notification, you can Click on the blue circle to Mark it as read. You can use the Viewing: All dropdown to filter to see only Unread.

Viewing: All   Sort By: Newest
From Last 30 Days

Purchase Orders: Multiple POs, Company: Collin College, Date: 09/21/2021
Your requisition has been approved and PO is dispatched.
3 day(s) ago

Purchase Order: PO-100750, Supplier: Trane Company, Date: 09/21/2021, Amount: $18,840.00
Purchase Order Event - Successfully Completed For REQ-100109
3 day(s) ago

Purchase Order: PO-100001, Supplier: Punchout Staples Business Advantage, Date: 09/01/2021, Amount: $296.69
23 day(s) ago
Details   Purchase Order: PO-100001, Supplier: Punchout Staples Business Advantage, Date: 09/01/2021, Amount: $296.69

Notifications

Viewing: All   Sort By: Newest
Last 30 Days
All
Unread

POs, Company: Collin College, Date: 09/21/2021
Your requisition has been approved and PO is dispatched.
3 day(s) ago

Purchase Order: PO-100750, Supplier: Trane Company, Date: 09/21/2021, Amount: $18,840.00
Purchase Order Event - Successfully Completed For REQ-100109
3 day(s) ago

Purchase Order: PO-100001, Supplier: Punchout Staples Business Advantage, Date: 09/01/2021, Amount: $296.69
23 day(s) ago
Details   Purchase Order: PO-100001, Supplier: Punchout Staples Business Advantage, Date: 09/01/2021, Amount: $296.69

Note: You will receive an e-mail in Outlook notifying you when your requisition has become a purchase order with a link.

From: collin@myworkday.com <collin@myworkday.com>
Sent: Thursday, September 9, 2021 9:11 AM
To: Erwin Whitlock <ewhitlock@collin.edu>
Subject: Purchase Order Event - Successfully Completed For REQ-100099

Click Here to view the notification details.

This email box is not monitored. Please do not reply to this message.

workday.