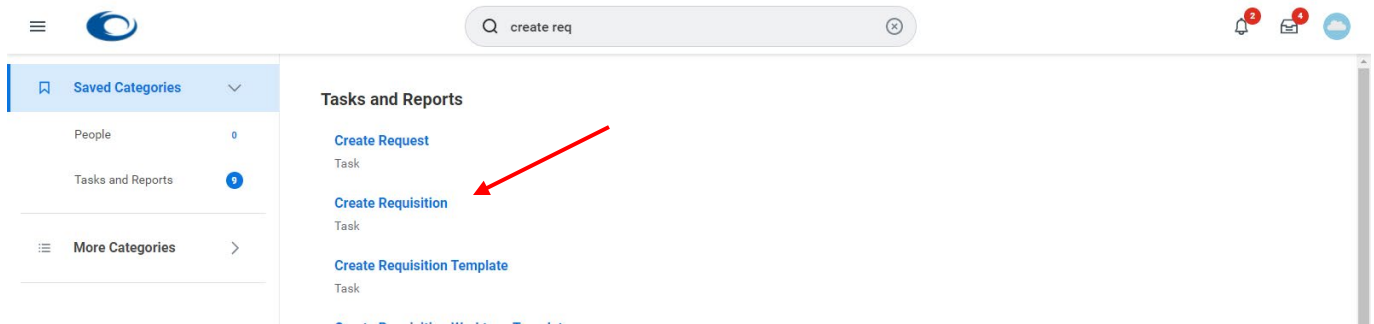


CREATE A PROCUREMENT REQUEST – Non-Catalog (Service (Open Purchase Order))

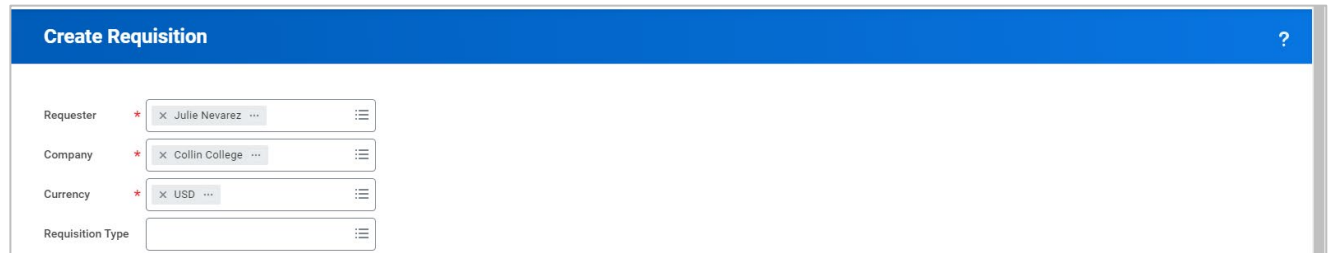
To create an open purchase order or a request for services use the following instructions. A separate procurement request should be created for each supplier. If a supplier has additional information or ordering instructions, this can be viewed in the Supplier’s information by clicking on the Notes Tab.

From your home page:

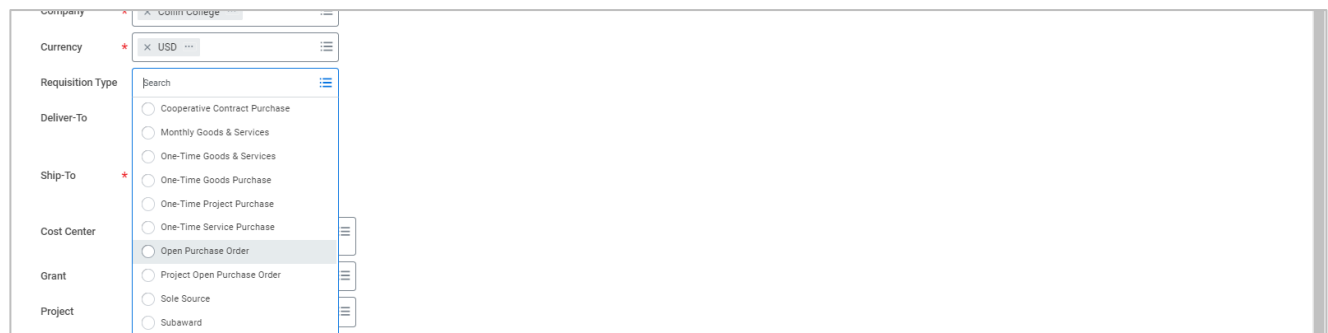
1. Enter *create requisition* in the Search bar. Choose the *Create Requisition Task*.



2. Confirm your *Requester (name)*, *Company*, *Currency*.



3. *Requisition Type* is optional at this point but will be required later in the process. The correct choice for this purchase would be Open Purchase Order, Monthly Goods and Service or One Time Services. (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.

Company	✕ Collin College ...
Currency	✕ USD ...
Requisition Type	
Deliver-To	✕ Collin College > Wylie Campus > Wylie PlantOps > Wylie P106
Ship-To	✕ 391 Country Club Road Wylie, TX 75098 United States of America

5. After using a Cost Center or Grant, it should auto-populate the *Additional Worktags*. To change the Cost Center, Click on the x to the left of the existing Cost Center then enter or select a cost center. Click in the *Deliver-To* field to find or search for the building and office for delivery. If using a Grant or Project, do not enter the Cost Center. Grant and Project will update cost center and all other Worktags.

Cost Center	✕ CC1142 Chief Innovation Officer
Grant	
Project	
Additional Worktags	✕ Campus: CA14 Districtwide ... ✕ Division: DV50 Technology Services

6. Click on the **OK** button at the bottom left.
7. There are three methods to make a purchase:
- Search Catalog (for Voss Lighting, Filter Systems and Einstein Printing)
 - Request Non-Catalog Items (for goods or services)
 - Connect to Supplier Website (punchout)

▼ **Instructions**

[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. Click on the Request Service radio button to begin entering an open purchase order. You will notice that the request details will change from Goods Request Details to Service Request Details. This type of purchase can also be used for maintenance or repair.

Requisition Currency * USD

Non-Catalog Request Type

Request Goods

Request Service

Service Request Details

Description * Open purchase order for miscellaneous hardware
Authorized Signatures:
Ken Lanius
Brian Putman

- 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.

- Enter a description including the Authorized Signatures if it is an open purchase order.
- You can type in the supplier's name or 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.**
- Select a contract if applicable.
- Enter Start and End Dates.

Start Date 09/27/2021

End Date 08/31/2022

Extended Amount 2,000.00

Memo Contract SCON-100083 General Hardware, Tools, Appliances, and Misc Supplies

Add to Cart
Continue Shopping ▾
Cancel

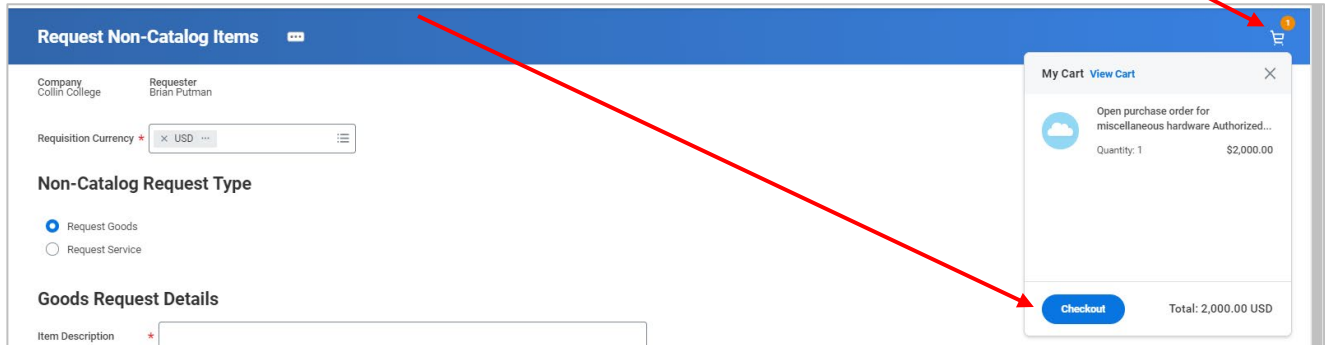
- Enter Extended Amount.
- Enter a Memo for Internal Purpose Only. This field is not sent to the supplier.
- Click on the Add to Cart.
- If additional lines are needed, you can create additional lines from this screen. If only one line item is needed or all line items are entered, you can click on the Cart icon at the top right.

Procurement:

CREATE A PROCUREMENT REQUEST

Non-Catalog (Service (Open Purchase Order))

19. Click on the Checkout button.



Request Non-Catalog Items

Company: Collin College | Requester: Brian Putman

Requisition Currency: USD

Non-Catalog Request Type

Request Goods
 Request Service

Goods Request Details

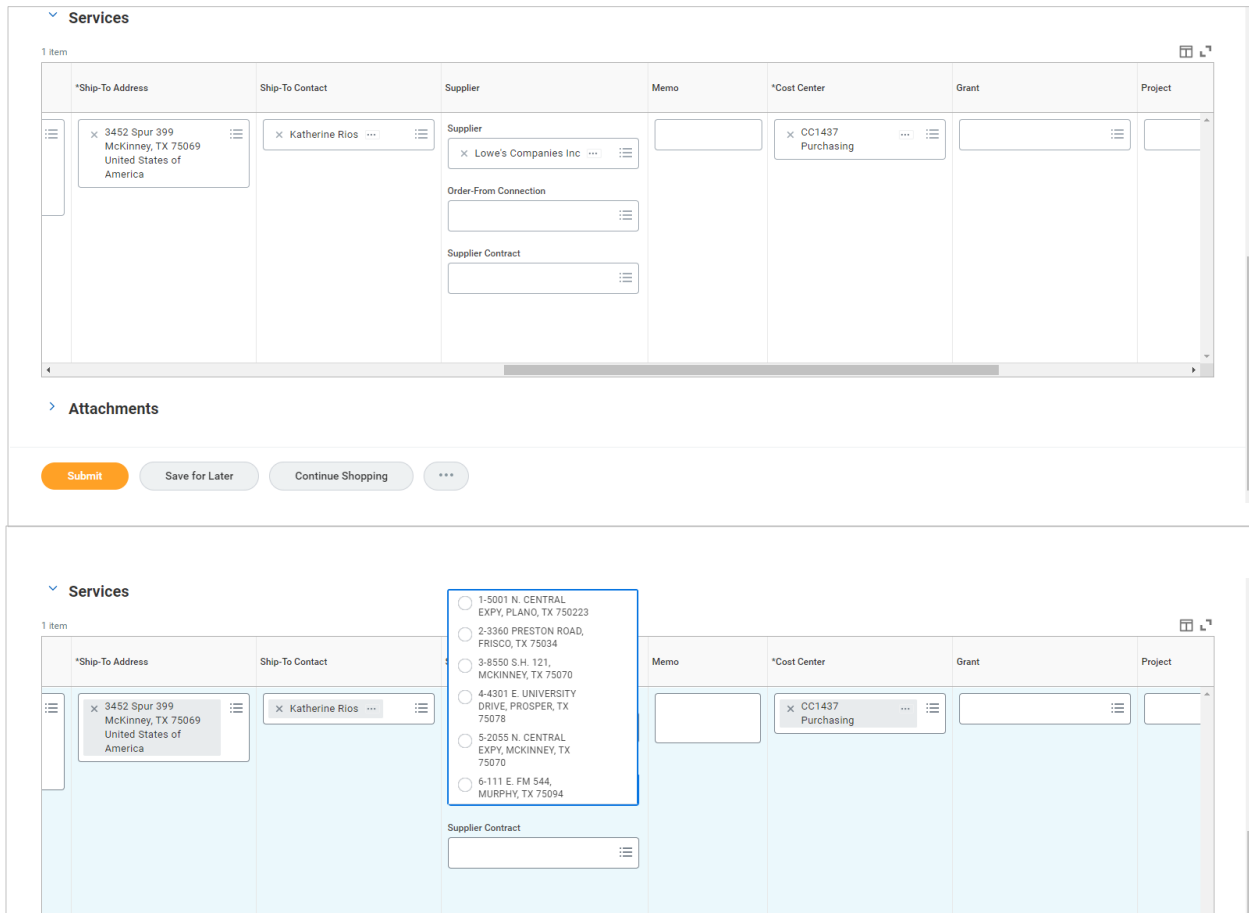
Item Description: *

My Cart View Cart

Open purchase order for miscellaneous hardware Authorized...
Quantity: 1 | \$2,000.00

Checkout Total: 2,000.00 USD

20. If there are multiple locations for a supplier, choose a supplier location from Order-From Connection.



Services

1 item

*Ship-To Address	Ship-To Contact	Supplier	Memo	*Cost Center	Grant	Project
3452 Spur 399 McKinney, TX 75069 United States of America	Katherine Rios	Lowe's Companies Inc		CC1437 Purchasing		

Attachments

Submit Save for Later Continue Shopping

Services

1 item

*Ship-To Address	Ship-To Contact	Supplier	Memo	*Cost Center	Grant	Project
3452 Spur 399 McKinney, TX 75069 United States of America	Katherine Rios	<input type="radio"/> 1-5001 N. CENTRAL EXPY, PLANO, TX 750223 <input type="radio"/> 2-3360 PRESTON ROAD, FRISCO, TX 75034 <input type="radio"/> 3-8550 SH 121, MCKINNEY, TX 75070 <input type="radio"/> 4-4301 E UNIVERSITY DRIVE, PROSPER, TX 75078 <input type="radio"/> 5-2055 N. CENTRAL EXPY, MCKINNEY, TX 75070 <input type="radio"/> 6-111 E. FM 544, MURPHY, TX 75094		CC1437 Purchasing		

Attachments

21. See Creating a Goods Requisition Steps 28 - 34 for remaining steps.



Procurement:
APPENDIX F: SUPPLIER UPDATE FORM

