Add Catalog Load Item Overview

This Quick Reference Guide (QRG) is designed to walk an Internal Service Delivery Data Entry Specialist through the process of creating a new catalog item in Workday. By the end of this QRG, you will be able to successfully add Internal Service Provider (ISP) Catalog Items to your catalog in Workday.

Procedure: Catalog Load using Internal Catalog Work Area

1. Type Internal Catalog Work Area in the search field.
2. Select Internal Catalog Work Area from the search results.

On the Internal Catalog Load Request screen:

3. Select Load Items for the catalog you need to add items to.

All fields and details under this section will either auto-populate or display automatically based on the previously filled details.

Do not select the Select Existing Items to Update checkbox when creating a new catalog item.

4. Click OK.
On the **Edit Catalog** screen:

5. Click **Add** to add to a new catalog item.

![Add Catalog Load Item](image)

Under the **Add Catalog Load Item** section:

6. Complete the following required fields:
   - **Action** – will auto-populate based on the action you’re performing; **New** for adding a new catalog item.
   - **Internal Item Identifier** – type the internal item identifier.

<table>
<thead>
<tr>
<th>The Internal Item Identifier naming convention:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• An external item ID from a 3rd party system that you can use to tie Workday reports back to that system.</td>
</tr>
<tr>
<td>OR</td>
</tr>
<tr>
<td>• An ISP related acronym followed by a digit(s) (e.g., Environmental Science items would be ENVSCI_1, ENVSI_2, etc.).</td>
</tr>
</tbody>
</table>

- **Item Name** – type the item name.
- **Item Description** – type the item description.
- **Spend Category** – select the spend category associated with the catalog item. The spend category selected here will auto-populate when using the item on an ISD and cannot be overridden.
- **Base Unit of Measure** – optional – select the unit.

<table>
<thead>
<tr>
<th>Catalog Item should be left blank when adding a new item.</th>
</tr>
</thead>
<tbody>
<tr>
<td>All fields under <strong>Additional Information</strong> section are optional.</td>
</tr>
</tbody>
</table>

Under **Ordering Units of Measure** table:

7. Click the (+) icon to add a unit of measure. Click the (-) icon to delete a unit of measure line as needed.
8. Complete the following required fields:
   - **Unit of Measure** – select the relevant unit of measure.
   - **Default** – select a default unit of measure for the catalog by selecting Default.

   ![Add Catalog Load Item](image)

   [For step 6]

   ![For steps 7-8](image)

   ![NOTE](image)

   All other fields under **Ordering Units of Measure** tab are optional.

   Add additional catalog items by repeating **Step 5** through **Step 8**.

9. Click **Submit** to submit the request.

   You have successfully completed this task. It will now be routed based on the workflow.
Procedure: Catalog Load using Internal Catalog Load Request task

On the Workday Home screen:

1. Type Internal Catalog Load Request in the search field.
2. Select Internal Catalog Load Request task from the Search Results.

On the Internal Catalog Load Request screen:

3. Complete the following required fields:
   - Internal Service Provider – select the ISP you want to add items for, from the drop-down.
   - Internal Catalog – select the internal catalog for which you want to add items.
   - Effective date - will auto-populate with the current date. This field can be updated.

   Should you choose to select the relevant Internal Catalog associated with the catalog item first, the Internal Service Provider field will auto-populate.

   **NOTE**

   All details under the Catalog Info section will automatically display upon competition of Internal Catalog and Internal Service Provider fields.

   Do not select the Select Existing Items to Update checkbox when creating a new catalog item.

4. Click OK.

On the Edit Catalog screen:

5. Click Add to add to a new catalog item.
Under the **Add Catalog Load Item** section:

6. Complete the following required fields:

- **Action** – will auto-populate based on the action you’re performing; **New** for adding a new catalog item.
- **Internal Item Identifier** – type the internal item identifier.

**NOTE**

The **Internal Item Identifier** naming convention:

- An external item ID from a 3rd party system that you can use to tie Workday reports back to that system.
  
  OR
  
  - An ISP related acronym followed by a digit(s) (e.g., Environmental Science items would be ENVSCI_1, ENVSI_2, etc.).

- **Item Name** – type the item name.
- **Item Description** – type the item description.
- **Spend Category** – select the spend category associated with the catalog item. The spend category selected here will auto-populate when using the item on an ISD and cannot be overridden.
- **Base Unite of Measure** – optional – select the unit.

**NOTE**

*Catalog Item* should be left blank when adding a new item.

All fields under **Additional Information** section are optional.

Under **Ordering Units of Measure** table:

7. Click the (+) icon to add a unit of measure. Click the (-) icon to delete a unit of measure line as needed.

8. Complete the following required fields:

- **Unit of Measure** – select the relevant unit of measure.
- **Default** – select a default unit of measure for the catalog by selecting **Default**.
All other fields under **Ordering Units of Measure** tab are optional.

Add additional catalog items by repeating **Step 5** through **Step 8**.

9. Select **Submit** to submit the request.

You have successfully completed this task. It will now be routed based on the workflow.