

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.

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Procedure: Catalog Load using Internal Catalog Work Area

On the Workday **Home** screen:


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

On the **Internal Catalog Work Area** screen:

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

Internal Catalogs 2 of 22 items					
Internal Catalog	Catalog Name	Internal Service Provider	Currency	Catalog Items	Load Items
Q	Arts & Sciences Chemistry - Storeroom (Internal)	Arts & Sciences Chemistry - Storeroom	USD	686	Load Items
Q	Arts & Sciences Chemistry - Storeroom (External)	Arts & Sciences Chemistry - Storeroom	USD	686	Load Items

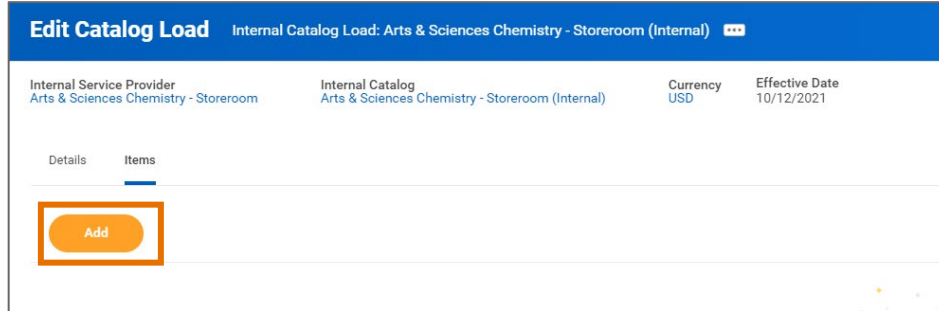
On the **Internal Catalog Load Request** screen:

 <p>NOTE</p>	<p>All fields and details under this section will either auto-populate or display automatically based on-the previously filled details.</p> <p>Do not select the Select Existing Items to Update checkbox when creating a new catalog item.</p>
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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	<p>The Internal Item Identifier naming convention:</p> <ul style="list-style-type: none"> • An external item ID from a 3rd party system that you can use to tie Workday reports back to that system. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • An ISP related acronym followed by a digit(s) (e.g., Environmental Science items would be ENVSCI_1, ENVSI_2, etc.).
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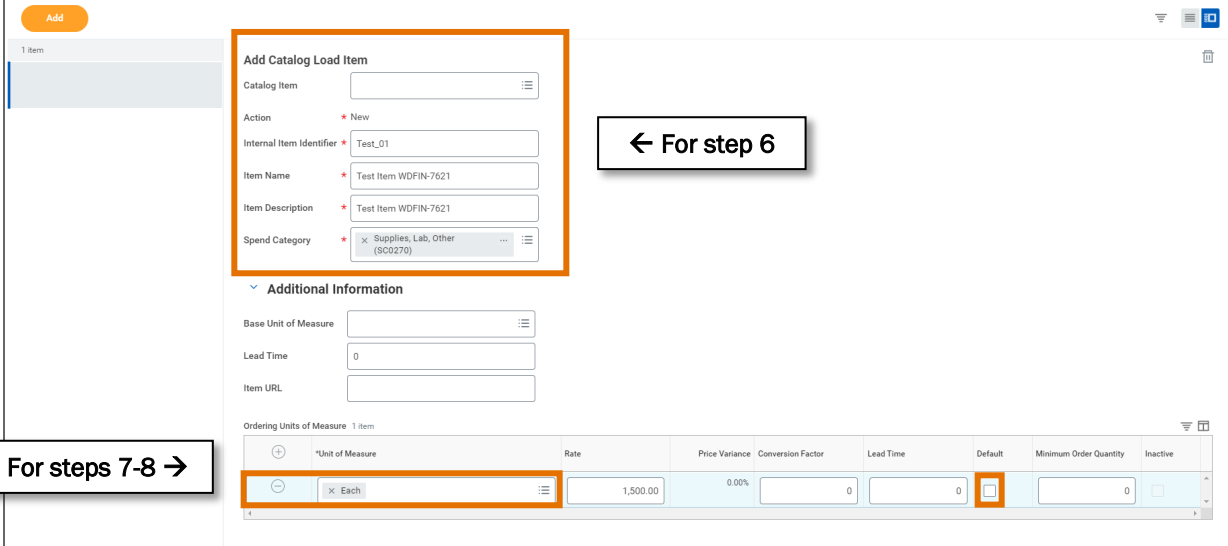
- **Item Name** – type the item name.
- **Item Description** –type the item description.
- **Spend Category** – select the spend category associated with the catalog item. The spend category selected here will auto-populate when using the item on an ISD and cannot be overridden.
- **Base Unite of Measure** – optional – select the unit.

 NOTE	<p>Catalog Item should be left blank when adding a new item.</p> <p>All fields under Additional Information section are optional.</p>
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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. 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.

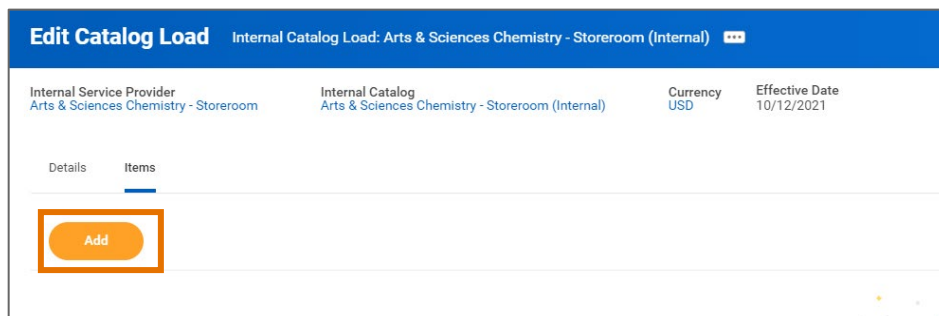
 <p>NOTE</p>	<p>Should you choose to select the relevant Internal Catalog associated with the catalog item first, the Internal Service Provider field will auto-populate.</p>
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 <p>NOTE</p>	<p>All details under the Catalog Info section will automatically display upon completion of Internal Catalog and Internal Service Provider fields.</p> <p>Do not select the Select Existing Items to Update checkbox when creating a new catalog item.</p>
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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	<p>The Internal Item Identifier naming convention:</p> <ul style="list-style-type: none"> • An external item ID from a 3rd party system that you can use to tie Workday reports back to that system. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • An ISP related acronym followed by a digit(s) (e.g., Environmental Science items would be ENVSCI_1, ENVSI_2, etc.).
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- **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	<p>Catalog Item should be left blank when adding a new item.</p> <p>All fields under Additional Information section are optional.</p>
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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**.

NOTE 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.