

Create Non-Catalog Purchase Requisition Overview

This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper** through creating a non-catalog purchase requisition. You will place non-catalog orders in Workday, which will then be integrated into the Marketplace. By the end of this QRG, you will be able to successfully create a non-catalog purchase requisition in Workday to procure goods and supplies as per UVA’s need.

<p>NOTE</p>	<p>Please Note: This process was formerly done through the Non-Catalog Order Form in the UVA Marketplace and will now be done in Workday. As a result, the Non-Catalog Order Form is no longer available in the UVA Marketplace.</p>
--------------------	---

Table of Contents

Create Non-Catalog Purchase Requisition Overview..... 1

Table of Contents..... 1

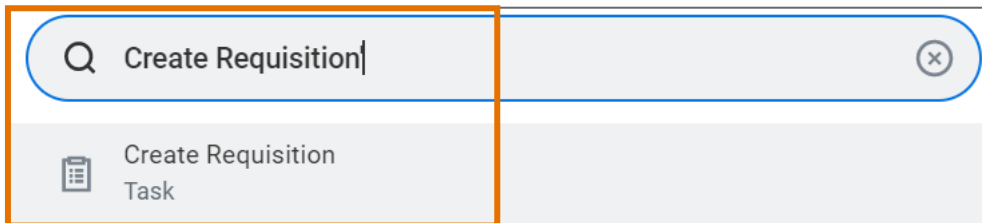
Procedure: Create Non-Catalog Purchase Requisition..... 1

Procedure: Create Non-Catalog Purchase Requisition with Splits 7

Procedure: Create Non-Catalog Purchase Requisition

On the **Workday Home** screen:

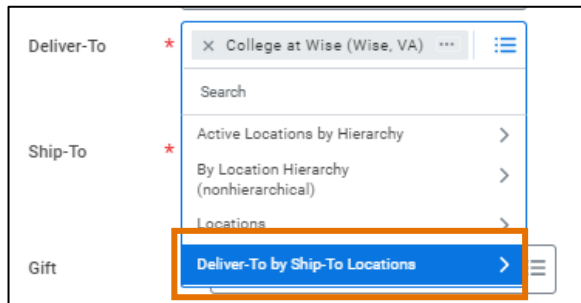
1. Type Create Requisition in the search field.
2. Select Create Requisition from the Search Results.



On the **Create Requisition** screen:

3. Complete the following required fields:
 - **Requester** – auto-populates based on user. If the requisition is being created for someone else, change the Requester to the appropriate individual. NOTE: This is the only place to change the Requisitioner. If a change from the default is needed it MUST be done here.
 - **Company** – auto-populates based on user.
 - **Currency** – auto-populates to USD.

- **Requisition Type** – select **Contract Request** when Spend Category Buyer review is needed, otherwise select **Standard**.
- **Deliver-To** – auto-populates based on the employee. If you want to keep the auto-populated suggestion, this will need to be updated to include the specific building details (e.g., name and room number). To select your accurate floor and/or room level Deliver to To Address:
 - In the Deliver-To field, select the **Deliver-To Ship-To Location** category.



- In the Deliver-To Ship-To Location dropdown, select the **building** or **building address** from the list and then select either a **floor level** or a **specific room** within the floor.

<p>NOTE</p>	<p>To avoid manually updating the Deliver-To field in the future, refer to the Change My Workspace and “Deliver-To” Location ORG.</p>
--------------------	---

- **Ship To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Ship To location as needed.

<p>NOTE</p>	<ul style="list-style-type: none"> • The Deliver To field auto-populates but does NOT include the building names and room numbers. This means some shipments will arrive with only basic delivery information such as street address and the name of the requester. • Worktag information may be added at this time, or once you get to the Goods or Service line of the non-catalog requisition form. However, if you would like the Worktag information to apply to ALL lines, it will save time to enter this information on this Header level.
--------------------	--

4. Click **OK** to proceed.

On the second **Create Requisition** screen:

5. If needed, review the Requisition Instructions by selecting the **Purchasing Basics** link.
6. Select **Request Non-Catalog Items** to proceed.

Create Requisition

Company: The Rector & Visitors of the University of Virginia Requester: Jack S. Jensen Currency: USD

▼ **Instructions**

Requisition Instructions

Before you process your requisition, please refer to the Purchasing Basics here. If you have questions or need additional assistance, please call 434-924-4212.

<https://procurement.virginia.edu/purchasing/purchasing-basics>

▼ **Select an Option**

[Request Non-Catalog Items](#)

Use this link for all non-catalog purchases, goods and services.

[Connect to Supplier Website](#)

Use this link to connect to the Jaggaer Marketplace to view the available catalog and non-catalog items.

On the **Request Non-Catalog Items** screen:

- Under Non-Catalog Request Type, select either the **Request Goods** or the **Request Service** option. If you select "Request Service" the fields will change. For services you will provide an extended amount rather than a quantity and a unit cost.

Non-Catalog Request Type

Request Goods
 Request Service

Goods Request Details

Item Description:

Supplier Item Identifier:

Commodity Code:

Spend Category:

Supplier:

Supplier Contract: (empty)

Quantity:

Unit Cost:

Unit of Measure:

Extended Amount: 0.00

Memo:

OR

Non-Catalog Request Type

Request Goods
 Request Service

Service Request Details

Description:

Commodity Code:

Spend Category:

Supplier:

Supplier Contract: (empty)

Start Date:

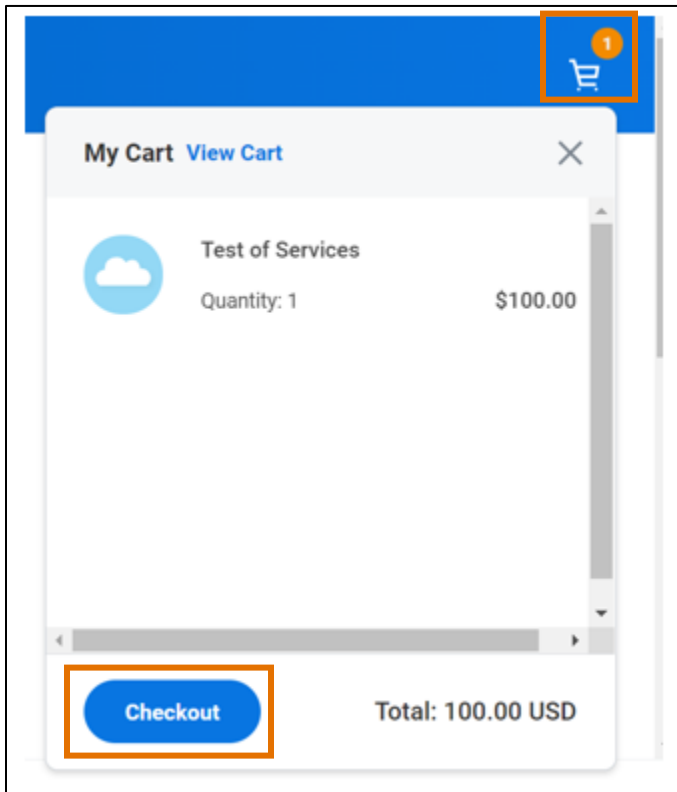
End Date:

Extended Amount:

Memo:

- Fill in all the appropriate information fields, making sure to include the Supplier.
- Once fields are completed, click **Add to Cart**.


10. You will now see a notification of the item in the shopping cart in the top right. Additional non-catalog items can be added on the non-catalog item form shown and added to the cart. Another option is to add additional items on the requisition information screen after checking out. When ready to checkout, click the **Cart** icon.
11. From either this screen, or after clicking **View Cart** to see a more detailed view of the cart, click **Checkout**.



On the Workday **Checkout** screen:


In the **Requisition Information Section**:

12. Review the details added previously and edit as needed.

	<p>Although not required, it is advisable to type a Memo to Supplier and Internal Memo to be able to reference your purchase requisitions easily in the future.</p>
---	---

13. In the **Goods** and **Services** sections, verify or complete the following required fields for **each of the line items bought**:


- **Company** – auto-populates based on user.
 - **For an Intercompany Requisition request**, change the default value and select the applicable company responsible for the requisition.
- **Spend Category** – select the spend category relevant to your purchase from the drop-down list. (may auto-populate depending on the item)

 NOTE	For Capital Equipment requisitions under \$5000, use Equip NonCapital. For Capital Equipment requisitions over \$5000, use Equip Capital.
--	--

- **Ship-To Address** – auto-populates based on user
 - **For an Intercompany Requisition request**, change the ship-to-address as needed.
 - **Gift, Grant, Designated, or Project** – if not done on the header level, enter Worktag in one of the four options
 - **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate based on the Gift, Grant, Designated, or Project Worktag).
 - **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user or the Gift, Grant, Designated, or Project Worktag)
 - **Function** – select the function relevant to the purchase
 - **Additional Worktags** – if the Rectors & Visitors company is being used, verify/enter the Business Unit
14. To add another non-catalog item, click the **Add Row +** button under the appropriate Goods or Services section. You will need to fill in (or cut and paste from previous line as appropriate) the description, spend category, amount, and supplier. **NOTE:** The worktags will populate based on your initial entry. Adjust as necessary.

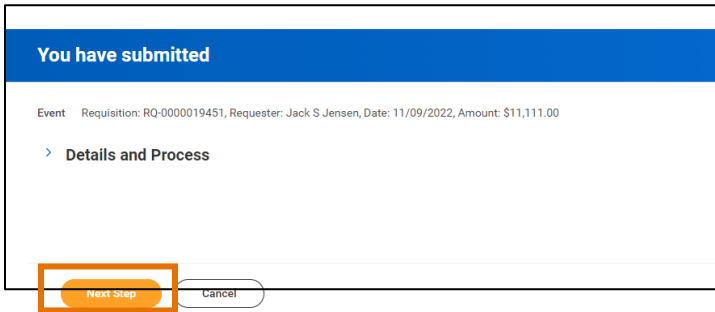
In the **Attachments** section:

15. Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents.

 NOTE	Adding attachments to your requisition is optional unless the requisition type is “Contract Request” or if it’s a non-catalog purchase over \$10,000. In these cases, an attachment is required.
--	--

16. Click **Submit** to submit your requisition.

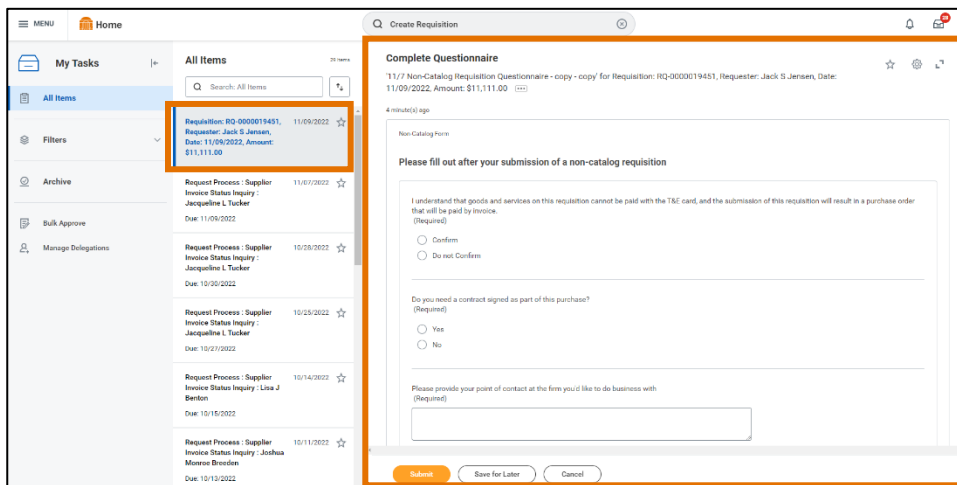
17. The **You have submitted** screen will appear. Click **Next Step** to be taken to the non-catalog purchase requisition questionnaire. This questionnaire **will only appear** if there is a non-catalog item on the requisition and the requisition is over \$10,000 for a non-contract vendor, and over \$200,000 for a contract vendor.



18. You will be taken to a Complete Questionnaire screen in your “My Tasks” section

NOTE

If you clicked out of the page, you can also access the questionnaire from your Workday inbox (**My Tasks**), as you will receive a notification to complete the questionnaire.



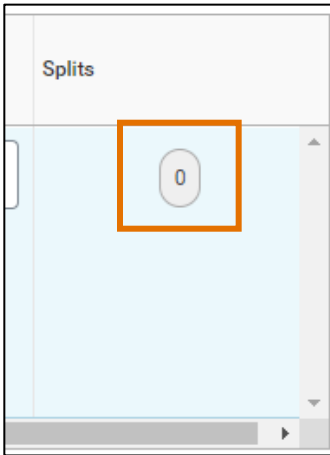
19. Complete the questionnaire. Additional questions may appear based on your answers to the questions shown.

20. Once the questionnaire is completed, click **Submit**.

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


Procedure: Create Non-Catalog Purchase Requisition with Splits

1. Follow the same steps 1-13 in the Create Non-Catalog Purchase Requisition section. When you get to the checkout screen and are verifying/completing the fields in the **Goods** and **Services** sections, click on the **Splits** button to the far right



In the Splits pop-up:

2. Select **(+) Add to** add another line in the Split table. If you need to remove the line from the Split table, select the **(-)** icon.
3. For each line, complete the following required fields in the table:
 - **Percent or Amount** – split the total percentage/amount of the Line Item into the required number of lines.
 - **Gift, Grant, Designated, or Project** – if not done on the header level, enter the worktag in one of the four options.
 - **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate based on the Gift, Grant, Designated, or Project Worktag).
 - **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user or the Gift, Grant, Designated, or Project Worktag).
 - **Function** – select the function relevant to the purchase.

 NOTE	<p>The total amount must be accounted for to proceed, as shown in the Amount Split and the Remaining Amount to Split lines.</p>
--	---

4. Follow the remaining steps of the requisition process as laid out above.

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