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.

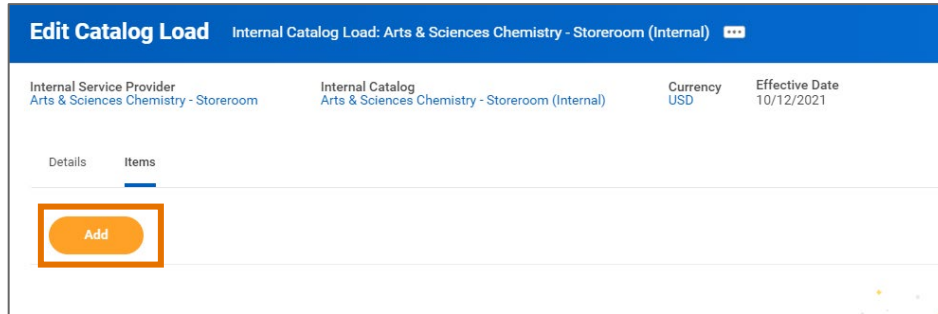On the **Internal Catalog Load Request** screen:

NOTE	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.

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**.

NOTE

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.

NOTE

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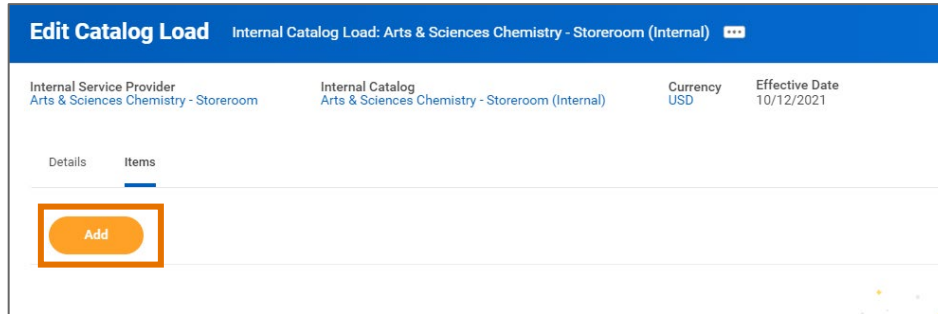
NOTE

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**.

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.