

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.


 NOTE	<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>
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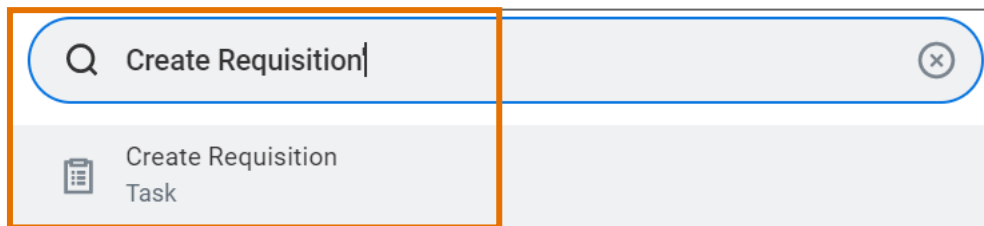
Table of Contents

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 from Requisition Template.....	8
Procedure: Create Non-Catalog Purchase Requisition from Previous Requisition	10
Procedure: Apply Discount to Non-Catalog Purchase Requisition	11

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.



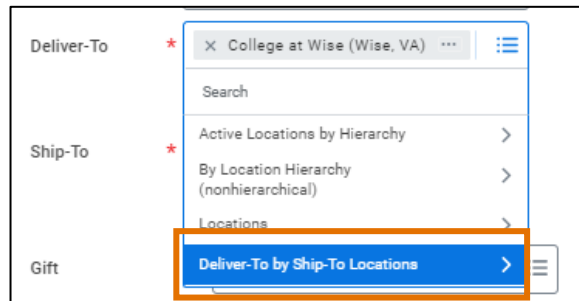
On the **Create Requisition** screen:

3. Complete the following required fields:
 - **Requester** – auto-populates based on user. If the requisition is being created


Create Non-Catalog Purchase Requisition – Quick Reference Guide

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 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.

 NOTE	To avoid manually updating the Deliver-To field in the future, refer to the Change My Workspace and “Deliver-To” Location QRG .
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- **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.

 NOTE	<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.
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4. Click **OK** to proceed.

On the second **Create Requisition** screen:

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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:

7. 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

Goods Request Details

Item Description *

Supplier Item Identifier

Commodity Code

Spend Category *

Supplier

Supplier Contract (empty)

Quantity *

Unit Cost

Unit of Measure *

Extended Amount

Memo

OR

Non-Catalog Request Type

Request Service

Service Request Details

Description *

Commodity Code

Spend Category *

Supplier

Supplier Contract (empty)

Start Date

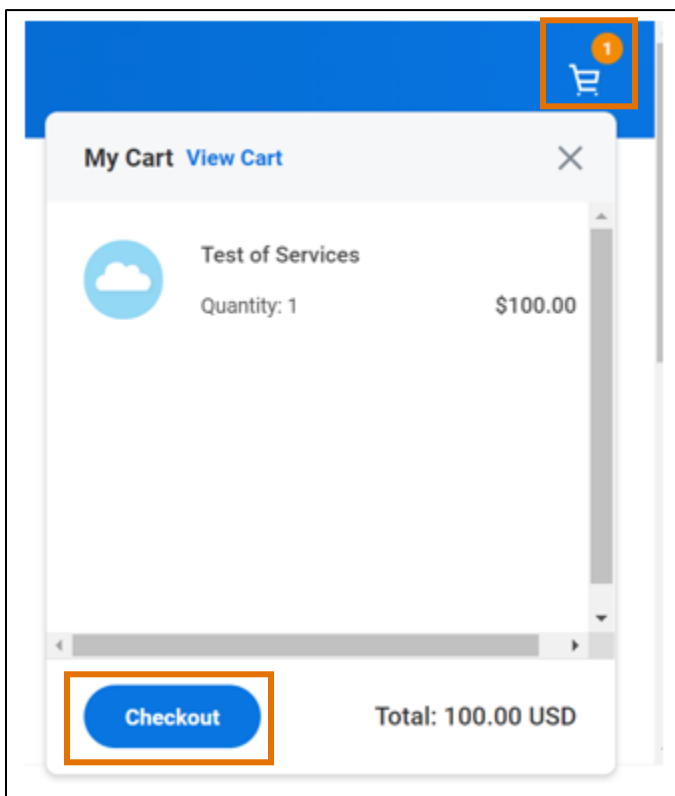
End Date

Extended Amount

Memo

Create Non-Catalog Purchase Requisition – Quick Reference Guide


8. Fill in all the appropriate information fields, making sure to include the Supplier.
9. 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>NOTE</p>	<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>
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Create Non-Catalog Purchase Requisition – Quick Reference Guide

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)



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:

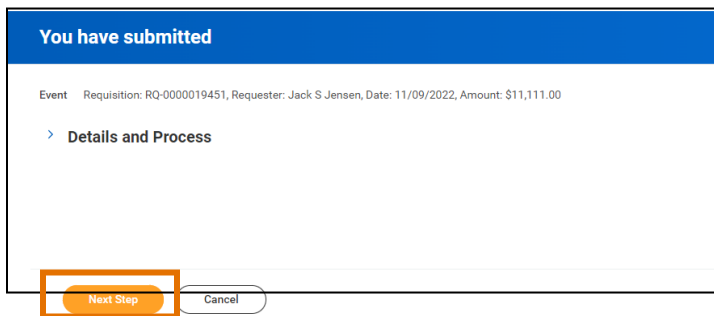
15. Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents.




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.

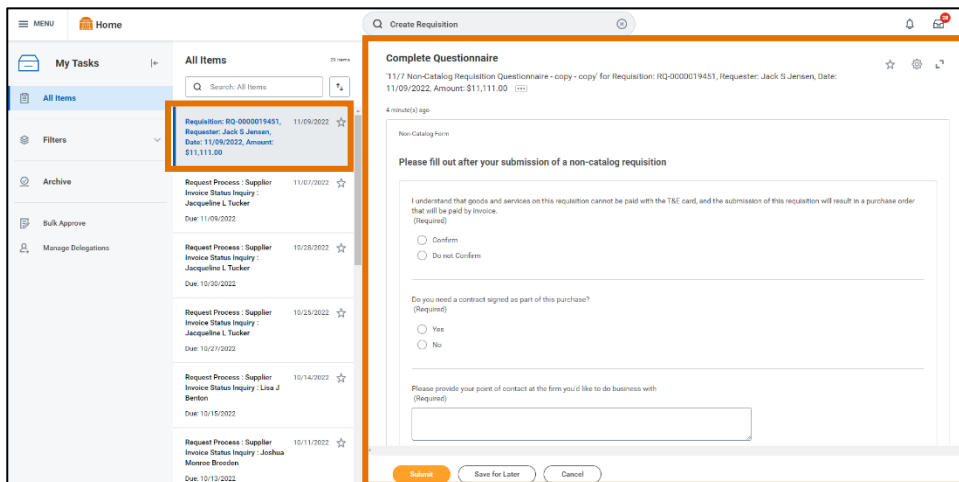
Create Non-Catalog Purchase Requisition – Quick Reference Guide

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

 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**.

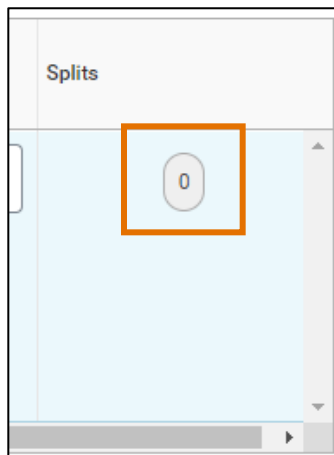
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 <p>NOTE</p>	Activity Stream is available on the Requisition and the Purchase Order once it is created. Activity Stream allows you to tag colleagues within your area in comments and see all related business process events and comments. This should NOT be used instead of an AskFinance ticket. Click HERE to learn more about Activity Stream and comments.
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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.

 <p>NOTE</p>	The total amount must be accounted for to proceed, as shown in the Amount Split and the Remaining Amount to Split lines.
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Create Non-Catalog Purchase Requisition – Quick Reference Guide

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

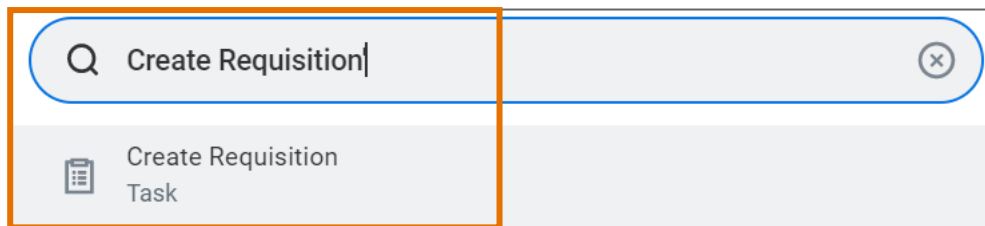
 <p>NOTE</p>	Activity Stream is available on the Requisition and the Purchase Order once it is created. Activity Stream allows you to tag colleagues within your area in comments and see all related business process events and comments. This should NOT be used instead of an AskFinance ticket. Click HERE to learn more about Activity Stream and comments.
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You have successfully completed this task. It will now be routed based on the configuration.

Procedure: Create Non-Catalog Purchase Requisition from Requisition Template

On the **Workday Home** screen:

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



3. Because you will be creating the requisition from a saved requisition template, which will override anything that is entered on the initial Create Requisition screen, you can just click OK.
4. On the second Create Requisition screen, click **Add from Templates and Requisitions**.

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 items.

Add from Templates and Requisitions

Select from requisition templates and past requisitions

Create Non-Catalog Purchase Requisition – Quick Reference Guide



The QRG for Creating a Requisition Template can be found at this link:
[Create a Non-Catalog Purchase Requisition Template](#)

5. Select from the saved Requisition Template and **Add to Cart**

The screenshot shows the 'Add from Templates and Requisitions' interface. At the top, it displays 'Company: The Rector & Visitors of the University of Virginia' and 'Requester: Jack S. Jensen'. Below this, there is a 'Requisition Currency' dropdown set to 'USD'. The main section is titled 'Requisition Templates 1 item' and contains a table with the following data:

Select	Name	Owned By	Date	Lines in Template
<input type="checkbox"/>	Sample Monthly Office Supply Order	Jack S. Jensen	04/18/2023	1

Below the table is a 'Past Requisitions 0 items' section with a 'No Data' message. At the bottom, there are three buttons: 'Add to Cart' (highlighted with an orange box), 'Continue Shopping', and 'View Items'. A 'Cancel' button is also present.

6. Verify that this is/are correct item/item(s) and click **Checkout**.

The screenshot shows the 'Cart' interface. At the top, it displays 'Company: The Rector & Visitors of the University of Virginia', 'Requester: Jack S. Jensen', 'Total Amount: \$10.00', and 'Currency: USD'. Below this, there is a table with the following data:

1 item	
Pens	5

Below the table is an 'Edit' section with the following fields:

- Description: Pens
- Spend Category: Supplies Office (SC0258)
- Supplier: The Supply Room
- Supplier Contract: (empty)
- Quantity: 5
- Unit of Measure: Each
- Unit Cost: 2.00
- Extended Amount: 10.00
- Item Identifiers: (empty)
- Item Tags: (empty)
- Memo: (empty)

At the bottom, there are two buttons: 'Checkout' (highlighted with an orange box) and 'Continue Shopping'.

7. Enter Requisition Type. If a contract needs signed or a buyer assist is needed, choose **Contract Request**. Otherwise, choose **Standard**.

Create Non-Catalog Purchase Requisition – Quick Reference Guide

8. Enter Memo to Supplier and Internal Memo information as needed.
9. Verify that all information on the Goods and/or Services lines are accurate, including the Worktag information, and adjust as needed.
10. Add any needed Attachments.
11. When done, click **Submit**.

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

Procedure: Create Non-Catalog Purchase Requisition from Previous Requisition

1. Follow steps 1-4 on the above Create Non-Catalog Purchase Requisition from Requisition Template procedure.
2. Select the previous Requisition number that you would like to duplicate this requisition from and then **Add to Cart**. **NOTE: Make sure that the requisition you are selecting contains only non-catalog order items.**

Add from Templates and Requisitions

Company: The Rector & Visitors of the University of Virginia | Requester: Scott R Willis

Requisition Currency: USD

Requisition Templates: 0 items

Select	Name	Owned By	Date	Lines in Template
No Data				

Past Requisitions: 35 items

Select	Requisition	Date	Memo to Suppliers	Internal Memo	Status	Lines in Requisition
<input type="checkbox"/>	RQ-000058239	02/03/2023			In Progress	1
<input type="checkbox"/>	RQ-000056974	01/31/2023			Successfully Completed	1
<input type="checkbox"/>	RQ-000054949	01/25/2023		TCM UVA-VISA-811	Successfully Completed	1
<input type="checkbox"/>	RQ-000053820	01/20/2023			Successfully Completed	4
<input type="checkbox"/>	RQ-000053238	01/19/2023	Trainer travel expense invoices must include receipts of actual expenses. Reimbursement of travel expenses cannot exceed actual expenses with receipts.		Successfully Completed	1
<input type="checkbox"/>	RQ-000053382	01/19/2023		State of Virginia (VITA) Information Technology Services Contract - VA-180315-ITRG	Successfully Completed	1
<input type="checkbox"/>	RQ-000053185	01/19/2023	Trainer travel expense invoice submittals must include all		Successfully Completed	1

Add to Cart | Continue Shopping | View Items | Cancel

3. Verify that this is/are the correct item/items and click **Checkout**.

Create Non-Catalog Purchase Requisition – Quick Reference Guide

Cart

Company: The Rector & Visitors of the University of Virginia | Requester: Jack S Jensen | Total Amount: \$10.00 | Currency: USD

Item	Description	Quantity	Unit Cost	Extended Amount
1 Item				
Pens		5	2.00	10.00

Edit

Description: Pens

Spend Category: Supplies Office (SC0258)

Supplier: The Supply Room

Supplier Contract: (empty)

Quantity: 5

Unit of Measure: Each

Unit Cost: 2.00

Extended Amount: 10.00

Item Identifiers: (empty)

Item Tags: (empty)

Memo: [Text Area]

Checkout | Continue Shopping

4. Enter Requisition Type. If a contract needs signed or a buyer assist is needed, choose **Contract Request**. Otherwise, choose **Standard**.
5. Enter Memo to Supplier and Internal Memo information as needed.
6. Verify that all information on the Goods and/or Services lines are accurate, including the Worktag information, and adjust as needed.
7. Add any needed Attachments.
8. When done, click **Submit**.

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

Procedure: Apply Discount to a Non-Catalog Purchase Requisition

You will create a non-catalog purchase requisition through the standard procedure, as instructed above.

The supplier's discount should be reflected on each of the item lines so that the price listed on the requisition will also be price charged to us through the supplier invoice.

It may also be helpful to layout of the terms of the discount in the Description field.

For example, if a supplier is offering us a 10% discount on Widget 1 and Widget 3, and a 5% discount on Widget 2, the items description would look similar to this:

Item Description * Supplier offering a discount of 10% on Widget 1 and Widget 3, and a 5% discount on Widget 2
Widget 1: \$100 - 10% discount = \$90 Widget 2: \$150 - 5% discount = \$142.5
Widget 3: \$300 - 10% discount = \$270

The unit cost for each item should reflect the discounted price. For Widget 1, the Unit Cost would be:

Create Non-Catalog Purchase Requisition – Quick Reference Guide

Quantity	*	<input type="text" value="1"/>	?
Unit Cost		<input type="text" value="90.00"/>	?
Unit of Measure	*	<input type="text" value="Each"/>	?
Extended Amount		90.00	

Add to Cart and then do the same for Widget 2 and Widget 3.

When all items have been added to the cart, proceed with checking out and completing the order as you would with a standard non-catalog purchase requisition.

Likewise, if a discount is given off the entire order, each line of the requisition will need to reflect this discount.

For example, if Widget 1 had a list price of \$100, Widget 2 had a list price of \$150, and Widget 3 had a list price of \$300, and the supplier was giving a 20% discount off of the entire order, each line-item amount needs to reflect the 20% discount:

	<u>List Price</u>	-	<u>20% discount amount</u>	=	<u>Requisition Line-Item Amount</u>
Widget 1:	\$100	-	\$20	=	\$80
Widget 2:	\$150	-	\$30	=	\$120
Widget 3:	\$300	-	\$60	=	\$240

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