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| WORKDAY CAPITAL EQUIPMENT REQUISITION TYPES & TRACKABLE SPEND CATEGORIES (UWA)  A supplemental guide for creating and submitting requisitions in Workday for Capital Equipment in UW Academy |
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WORKDAY CAPITAL EQUIPMENT REQUISITION TYPES & TRACKABLE SPEND CATEGORIES (UWA)

A supplemental guide for creating and submitting requisitions in Workday for Capital Equipment in UW Academy

**Purpose**

The purpose of this guide is to help Requisitioners determine the correct ***capital equipment*** ***requisition* *type*** and ***trackable spend category*** to use for ***capital equipment purchases***.

**Key Terms:**  
**Capital Equipment**: Capital equipment is defined as equipment having a useful life greater than one year and a total cost >= $5,000 (including ancillary costs.) Per UW policy, capital equipment must be tracked in Workday. Additionally, all weapons and accessories, regardless of cost must be tracked in Workday. A *Trackable* Spend Category must be used to requisition Capital Equipment.

**Trackable Spend Category**: Trackable spend categories were created specifically to identify equipment purchases that will result in the creation of an asset record.

* A Requisitioner Guide to Trackable Spend Categories has been created to assist in the selection of the correct trackable spend category.
* Requisitions that include a trackable spend category will include routing to a Business Asset Tracking Specialist for approval. When the equipment is physically received, the Workday ‘Create receipt’ task will kick off the asset registration process if the goods line used a trackable spend category.

**Capital Equipment Requisition types**:

* **Capital Asset Request-** You will use this requisition type for your capital equipment purchases unless they meet the definition of a multi-component capital asset.
* **Multi-Component Capital Asset Request** – Choose this requisition type only when multiple components must be combined to create one functioning piece of equipment with one useful life. [this requisition type will be rarely used]

This document will cover:

* [How to Create a **Capital Asset Request** (for Non-Catalog equipment](#_Create_a_Capital))

* [How to Create a](#_Create_a_Multi-Component) **[Multi-Component Capital Asset Request](#_Create_a_Multi-Component)** [(for Non-Catalog equipment)](#_Create_a_Multi-Component)

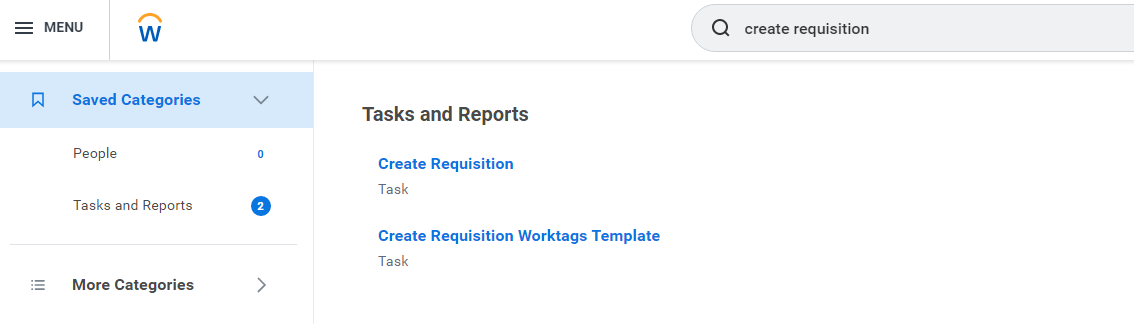
## Create a Capital Asset Request (for Non-Catalog Capital Equipment)

### Steps

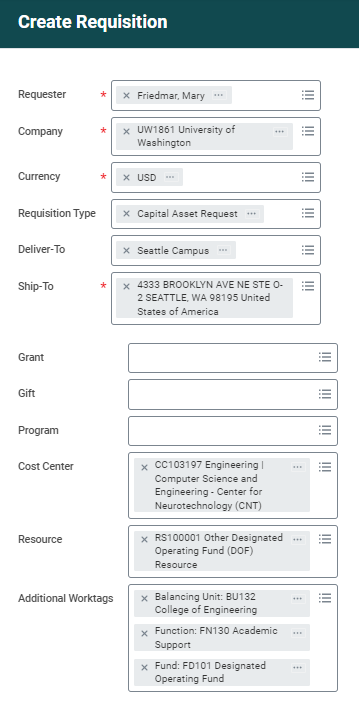
* 1. Type **Create Requisition** in the Search bar



* 1. Select the **Create Requisition** task from the search results



* 1. On the Create Requisition page, select **Capital Asset Request** from the available options. Then enter the Worktags for the purchase, the correct **Deliver-To** and **Ship-To** addresses, and other mandatory fields. Click **OK**

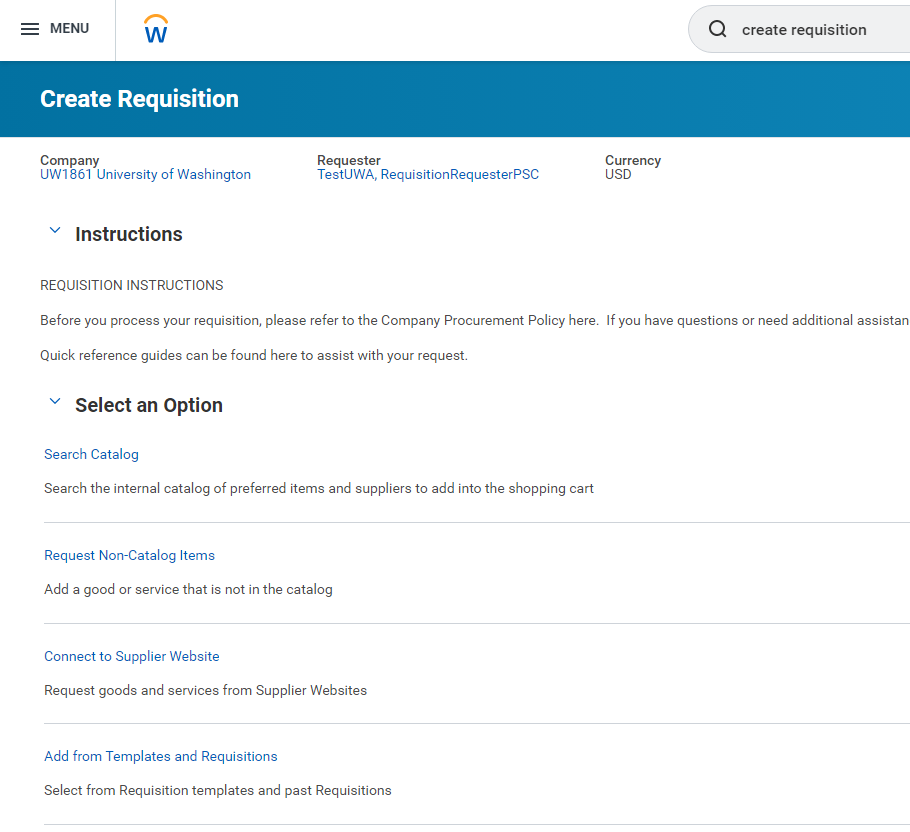


***Note:*** *If the requisition is on a Grant, the grant worktag will populate all other required worktags.   
  
If the requisition is on a Cost Center, as shown here, entering the Cost Center will populate the Balancing Unit and Function worktags. You must then enter a Resource Worktag which will populate the Fund Worktag.*

A close-up of a button

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* 1. Select **Request Non-Catalog Items**



* 1. Complete the **Goods Requests Details section,** choosing a **Trackable Spend Category** for the item. It is helpful to include the **Supplier Item Identifier** (supplier catalog or part number)and **Supplier** if known**.**



***Note:***  *You can search the Requisitioner Guide to Trackable Spend Categ*ories *on a keyword, e.g., “Boat” to determine that SC1235 is the correct trackable spend category for the item.  
  
If you were to enter a Non-Trackable Spend Category with one of the two Capital Equipment requisition types a warning message will advise you to select a Trackable Spend Category.*

* 1. Select Add to Cart
  2. Click the shopping cart

A green rectangle with a white cart and a yellow circle

Description automatically generated with low confidence

* 1. Click Checkout
  2. Submit the requisition  
     </end>

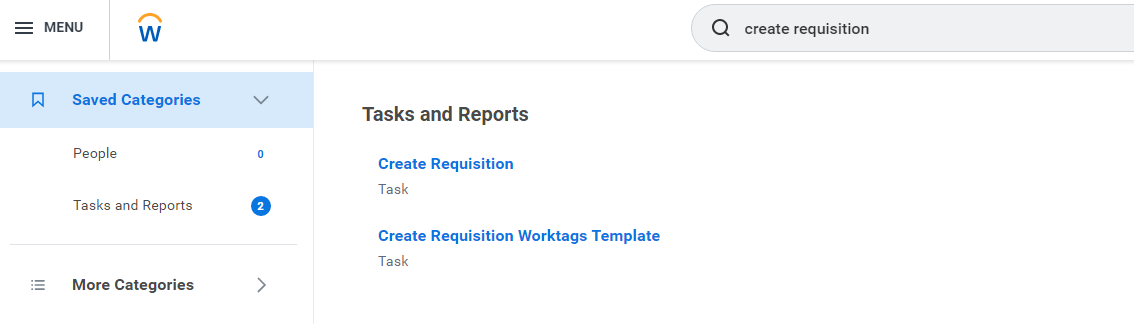
## [Create a Multi-Component Capital Asset Request (for Non-Catalog equipment](#_Create_a_Capital))

### Steps

### Type Create Requisition in the Search bar



### Select the Create Requisition task from the search results



### On the Create Requisition page, select Multi-Component Capital Asset Request from the available options. Then enter the Worktags for the purchase, the correct Deliver-To and Ship-To addresses, and other mandatory fields. Click OK

A screenshot of a computer

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***Note:*****Multi-Component Capital Asset Request** *is used when multiple parts must be combined to make up a system, or where parts need to be combined for the asset to work.*

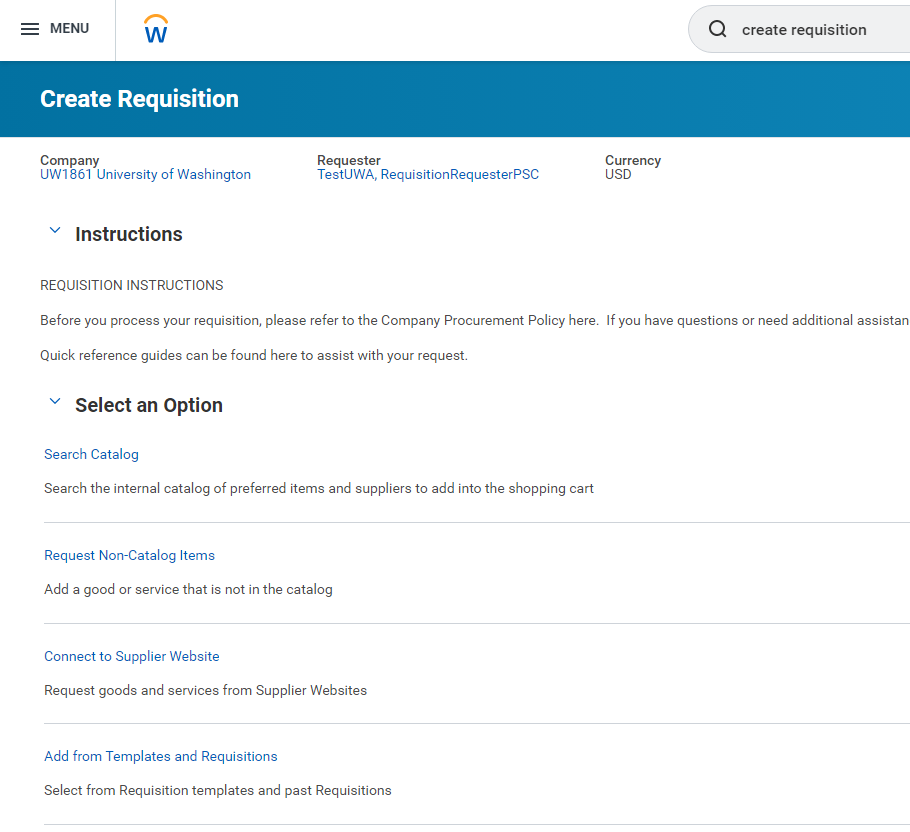
*An example would be:*

* *a server $7,2000*
* *a Network switch $3200*
* *and a server rack $2,000*

*where the combined items will be registered as one asset with a total cost of $12,400.00, one date in service, and one useful life. When the asset is later disposed, it will be disposed as one unit.*

*Since the* ***total cost of the combined parts*** *is >= $5,000, we will use a Trackable spend category for* **each** *line item. In this example the same trackable spend category (SC1231 Information Technology equipment) applies to each line item*

1. Select Request Non-Catalog Items



1. Complete the **Request Non-Catalog Items** form, for the first component, the Server, choosing **Trackable Spend Category** *SC1231 Information Technology equipment*.

A screenshot of a login form

Description automatically generated with medium confidence

1. Select Add to Cart
2. Complete the form, for the 2nd component, the Network Switch, choosing **Trackable Spend Category** *SC1231 Information Technology equipment*.

A screenshot of a login

Description automatically generated with low confidence

***Note:***  *This item is < $5,000, but since the requisition type is Multi-Component Capital Asset Request, a trackable spend category is used because this item is part of the composite asset.*

1. Select Add to Cart
2. Complete the form, for the 3rd and final component, the Server Rack, choosing **Trackable Spend Category** *SC1231 Information Technology equipment*.

A screenshot of a computer

Description automatically generated with medium confidence

***Note:***  *This item is < $5,000, but since the requisition type is Multi-Component Capital Asset Request, a trackable spend category is used because this item is part of the composite asset.*

1. Select Add to Cart
2. Click the shopping cart

A green rectangle with a white cart and a yellow circle

Description automatically generated with low confidence

A screenshot of a computer

Description automatically generated with medium confidence

1. Click Checkout
2. Submit the requisition  
   </end>