ICONS REFERENCED IN THIS JOB AID

Required * Prompt Related Actions

BLANKET ORDER FOR NON-CATALOG GOODS OR SERVICES

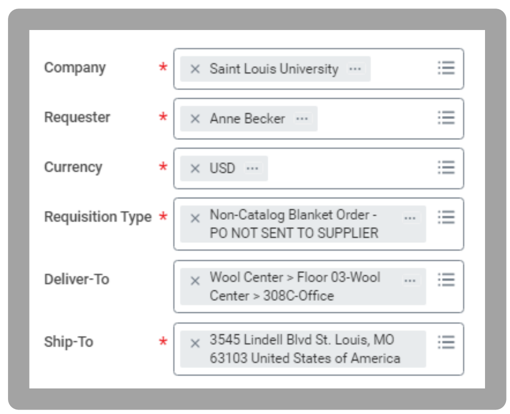
This job aid will illustrate the steps for creating a blanket order for non-catalog goods or services. It is appropriate for suppliers who take orders over the phone, on their direct website, by will call, or if services are needed on a frequent basis throughout a fiscal year. This type of blanket order is primarily used with suppliers that do not have a punchout catalog; however, it can be used with punchout suppliers if ordering methods outside of Workday are necessary. This type of blanket order is also appropriate when pulling product from the consignment closet at the Doisy Research Center.

The full blanket order total is encumbered when the purchase order is approved. The blanket order can have multiple receipts created against it and a supplier can send multiple invoices throughout the fiscal year against that single purchase order number. The department must reference the blanket order number when placing orders with suppliers to ensure billing accuracy. The supplier will not receive a copy of this blanket order – it will be issued in Workday only.

Please reference the "Blanket Order Decision Tree" guide if you are unsure if this is the correct requisition option for your blanket order.

Steps:

1. From the Workday search bar, type **Create Requisition**, and access the task.
2. Input the following information:



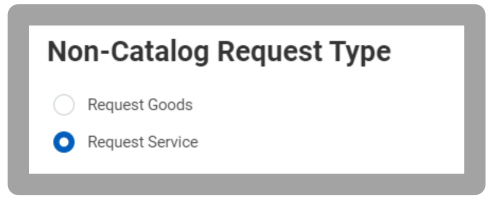
   a. **Company**: This will auto-populate.
   b. **Requester**: This will auto-populate.
   c. **Currency**: This will auto populate.
   d. **Requisition Type**: Select Non-Catalog Blanket Order – PO NOT SENT TO SUPPLIER
   e. **Deliver-To**: This will auto-populate. This deliver-to can be changed if you are ordering goods/services for another location on campus. To change the deliver-to, clear out the default deliver-to, enter the room number of the location you are ordering for, and then select the appropriate location based on building and room number.
   f. **Ship-To**: This will auto-populate. If the deliver-to location is changed using the instructions above, the building's address in the ship-to will automatically change.
   g. **Worktags**: Grant / Gift / Project / Cost Center / Fund / Function – These worktags default from your employee profile. If your blanket order should have different worktags, you can change them here and the changes will apply to your blanket order. Changing the cost center will default in the applicable fund and function worktags. If you are using a grant or program worktag, change that first and all applicable worktags will also be updated.
3. Click **OK**.

Select an Option

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

Request Non-Catalog Items

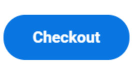
1. Input the following information in these required fields:
   a. **Requisition Currency**: This will auto-populate.
   b. **Non-Catalog Request Type**: Select **Request Service**. This selection is required for goods or services. It will allow the supplier to send multiple invoices against the blanket order for billing.



   c. **Description**: Enter a description for the blanket order, including Cost Center / Supplier Name / Fiscal Year
   d. **Spend Category**: Select the appropriate value by entering the legacy Banner account code or name of the spend category. The spend category is the worktag previously known in Banner and Billiken Buy as the account code. Users can enter the legacy account code into the spend category field for it to display. A full list of spend categories and the legacy account codes (defined as "commodity code") can be found by running a report titled "Data Audit Spend Categories". – Example: 741000 -> Professional Services
   e. **Supplier**: Select the appropriate value. The Workday Supplier ID is the same as the supplier's former Banner ID. You can enter the legacy Banner ID in this field and the supplier name will auto-populate. Alternately, you can enter the supplier name.
   f. **Start Date/End Date**: Fiscal year dates (e.g. 07/01/2021 – 06/30/2022)
   g. **Extended Amount**: Enter the amount. This will be the amount encumbered.
2. Click **Add to Cart**. 

Checkout

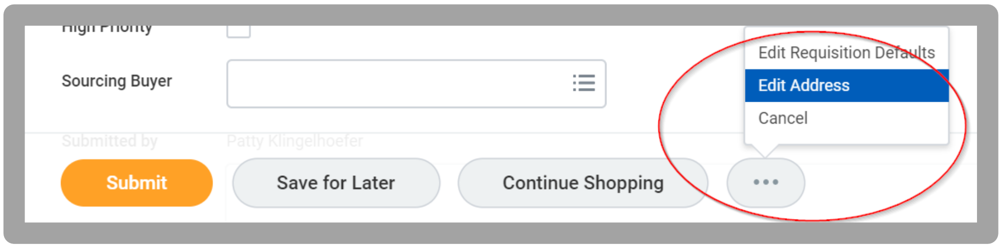
1. To check out, click the cart icon located in the upper right-hand corner of the page.

2. Click 

3. **Shipping Address**: This will auto-populate.

Note: The Deliver-To address will feed over to the Purchase Order for the Supplier. The Ship-To Address is the location of the building the requester is located in.

1. To change the address, locate and access the **actions icon**.
2. Select **Edit Address**
3. Clear out and replace the addresses, as necessary.



Requisition Information

1. Input the following information:
   a. **Request Date**: This will auto-populate. Change the request date to be 07/01/20XX, the beginning date of the fiscal year that it applies to.
   b. **Currency**: This will auto-populate.
   c. **Requisition Type**: This will auto-populate.
   d. **Sourcing Buyer**: Leave this blank.

Note: If you are a department that utilizes **centralized purchasing function** such as Shared Services, use this prompt to route to this department. This will enable the department to review the requisition prior to routing for approvals. You can input the name of the person who needs to review your requisition by typing it into this field.

Services

1. Review the auto-populated fields for accuracy.
   a. **Grant:** If your purchase is related to a grant, populate the prompt accordingly.
      1. This will auto-populate the **Cost Center**, **Fund**, and **Function** prompts.
   b. **Worktags**: If the worktags were not updated on the Create Requisition screen, they can be changed on this page. Select **Submit** to submit the requisition.

Questionnaire

1. If the purchase order is above the competitive bid threshold of $10,000, the requester will be prompted to complete a purchasing questionnaire to justify the purchase.
2. Select **Complete Questionnaire**.
3. Read and complete the questionnaire. Selections include:

   a. Competitive Bids were Obtained (3) – This option applies if your purchase can be bid out. Select this option and attach competitive bids.
   b. This is a sole source vendor – "Sole Source" is defined as a product or service which is **only** available from one source. – This option applies if your purchase can only be made with one supplier. Select this option and answer the prompted question. **Note: If a contract is in place with a sole source vendor, please select the sole source vendor option.**
   c. This purchase or service is under a competitively bid contract – This option applies if your purchase is covered by a competitively bid contract – Example: Clean Uniform or Ronnoco Coffee

Note: If you have any questions about which option to select, please contact your Business Services representative.

4. Click **Submit**.
5. Click **Done**.
6. This will follow the standard requisition approval process.

Once the purchase requisition is approved, you will receive a notification of the approval to your Workday inbox and your email inbox. The supplier will NOT receive a copy of the blanket order and the PO will only be visible in Workday.