An Ad Hoc Goods or Services Requisition is the traditional blank requisition for requesting any goods or services that cannot be ordered via a catalog or punchout.

1. Search for Create Requisition or access from the Purchases Worklet.
2. Check Company Name and Requestor; change as needed.
3. Click OK.
Procurement: Create an Ad Hoc Goods or Services Requisition

4. Select Request Ad Hoc Goods or Services.

Request Ad Hoc Goods or Services

☐ Summary
Company: Florida Atlantic University
Requester: Tony Munro (200009552)
Currency: USD

Non-Catalog Request
☐ Request Goods
☐ Request Service

Item Description

Spend Category
Supplier
Supplier Contract
Quantity
Unit Cost
Unit of Measure
Extended Amount

Current Workcart

<table>
<thead>
<tr>
<th>Workcart Items</th>
<th>Quantity</th>
<th>Price</th>
<th>Supplier</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save and Checkout</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Save and Manage Workcart</td>
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<tr>
<td>Cancel</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

5. Check Request Goods or Request Services.

* The selection of a Request Goods or Request Services is based on how the item is to be Received in Workday.

GOODS are anything that will be received, accepted and tracked in Workday by the QUANTITY. For example: a computer, business cards, or lab supplies are considered goods because they have a defineable Quantity, Unit Cost, and use Units of Measure like Each, Box, or Lot.

SERVICES are anything that will be received, accepted and tracked in Workday that is not a goods item and will be received based on the DOLLAR AMOUNT. A
Procurement: Create an Ad Hoc Goods or Services Requisition

Services request does NOT have a quantity, unit cost, or unit of measure and simply expressed as a Dollar Amount.

FAU will also be using the Request Services type requisition for creating BLANKET ORDER Requests, where a Blanket PO will be created with the vendor for as needed ordering of both Goods (Supplies) and Services.

6. Enter Description.
7. Enter/Search for Spend Category.
8. Enter Supplier, if known. Otherwise, Supplier can be left blank. Leave the Supplier Contract field blank.
9. For Good Lines, enter Quantity, Unit Cost, and Unit of Measure, as appropriate. For Service Lines enter Start and End Dates, and Extended Amount.
10. Click on Save and Checkout.

Your screens and processes may vary from those described here.
**Procurement: Create an Ad Hoc Goods or Services Requisition**

11. Normally the Requisition Type field should be left Blank. The other available options to select from are Blanket PO, Change Order, or Payment Request as necessary.

12. Check High Priority Flag if high priority.

13. Check Add Ad Hoc Address is shipping to a different location or to enter address with building and room number.

14. Select/enter Request Date.

15. Leave Sourcing Buyer Blank.

16. Enter Additional comments in Memo Field.

17. Check Goods and/or Services Lines and review descriptions, quantity, unit cost, unit of measure, start/end dates and extended amounts, as appropriate.

18. Check/Change Spend Category and SmartTags as necessary.

19. Use Project Worktag (Tech Fees, Construction, etc.) or Grant Worktags as necessary. If buying equipment over $5,000 on a Grant the “Expense Treatment over $5,000” Worktag must be added to Additional Worktag.

20. Click on Attachments. Upload documents for requisition such as vendor quote.

21. Click on Ad Hoc Address. Add Ad Hoc Address complete all red star fields.

22. Click Submit to complete and send for approval.