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| WORKDAY CAPITAL EQUIPMENT REQUISITION that includes a TRADE in (UWA)  A supplemental guide for creating and submitting requisitions in Workday for Capital Equipment in UW Academy |
| |  |  |  | | --- | --- | --- | | Workday Job Aid – Work Instructions |  |  | |

**Purpose**

The purpose of this guide is to help Requisitioners account for equipment that is purchased where a trade-in credit is received for traded in capital equipment.

**Scenario**: A new PCR system is being purchased. The PCR system has a total cost of $24,000.00.  
The department has an outdated PCR system they are trading in for credit from the supplier. The supplier agrees to give the department a $6,000 trade in credit for the old PCR system.   
  
**Goals:**

1. Requisition the new equipment at $24,000 so that later an asset will be created that reflects the true value of the equipment.
2. Capture the $6,000 trade in credit.
3. Capture the physical tag# of the equipment being traded in, so that the Equipment Inventory Office can properly dispose of the equipment that is no longer at UW. Not doing this is an audit risk.

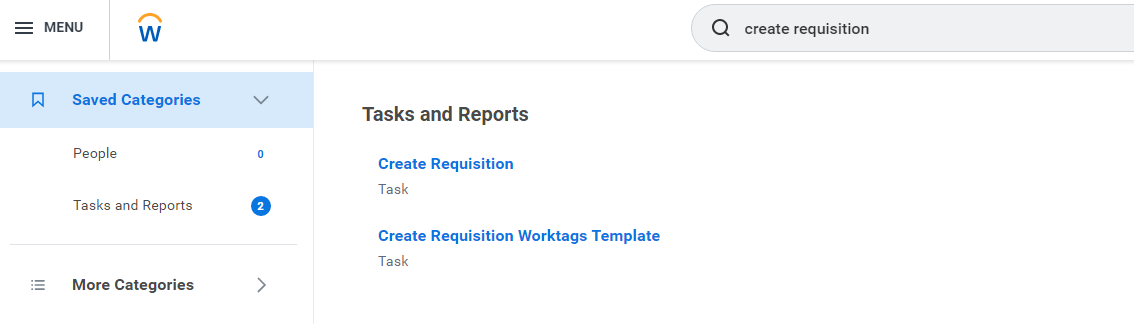
## Create a Capital Asset Request (for Non-Catalog Capital Equipment) (note: jump to step 5 if you don’t need help on creating a requisition you just need help on entering the goods lines correctly)

### Steps

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

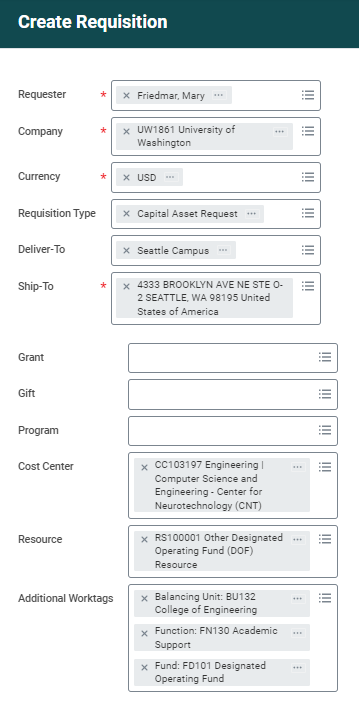


* 1. Select the **Create Requisition** task from the search results

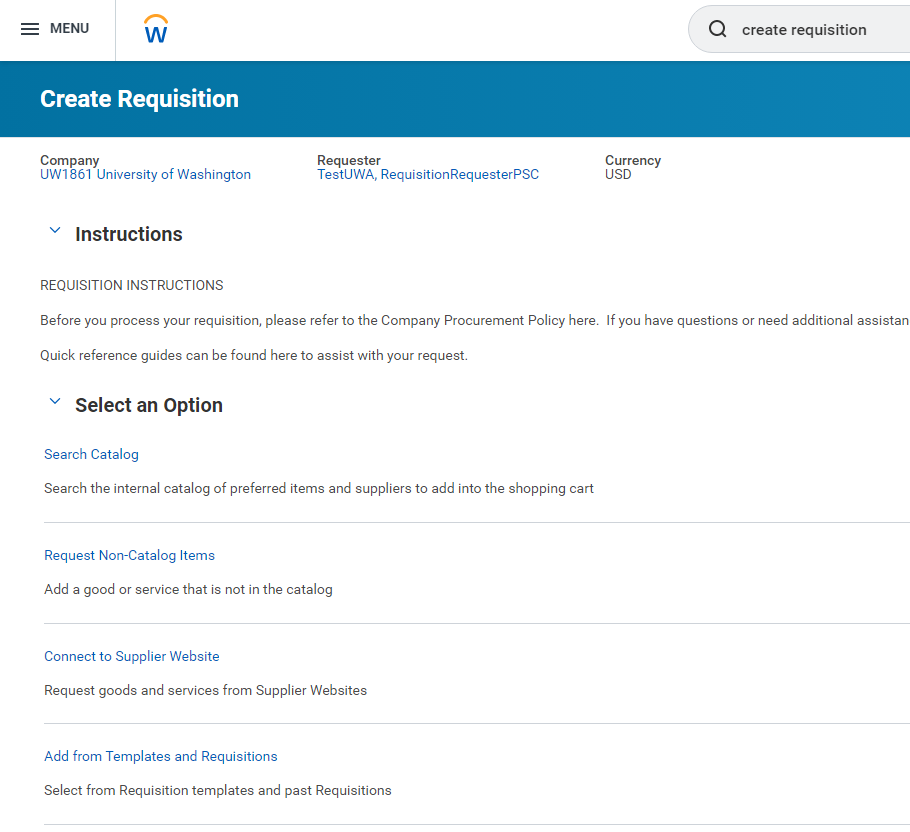


* 1. On the Create Requisition page, select **Capital Asset Request** from the available options. Then enter the Worktags for the purchase, the correct **Deliver-To** and **Ship-To** addresses, and other mandatory fields, then Click **OK**

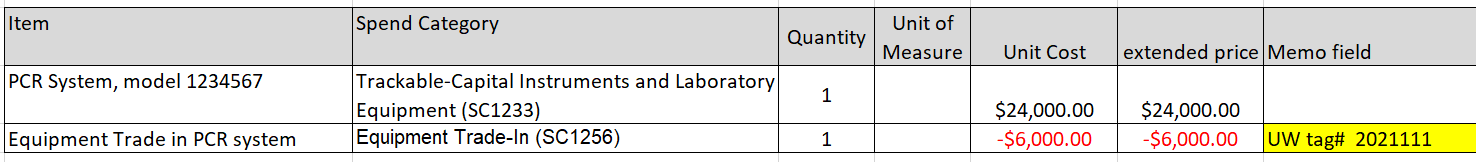
***Note:*** *If the requisition is on a Grant, the grant worktag will populate all other required worktags.   
  
If the requisition is on a Cost Center, as shown here, entering the Cost Center will populate the Balancing Unit and Function worktags. You must then enter a Resource Worktag which will populate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



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



* 1. Complete the **Goods Requests Details section for the new equipment and the trade in credit:**
* Choose the correct **Trackable Spend Category** for the new equipment.
* add a 2nd line for the Trade-In using the Trade in Spend category (SC1256)
* Use the memo line to ADD the physical tag# of the equipment being traded in.



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  
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