

Overview

This document explains how Requesters can create a requisition to procure goods and/or services.

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

Considerations by Institution

- Follow your institution's policies for requesting requisitions and purchase orders.

Icons Referred to in This Document



Required Field



Radio



Prompt



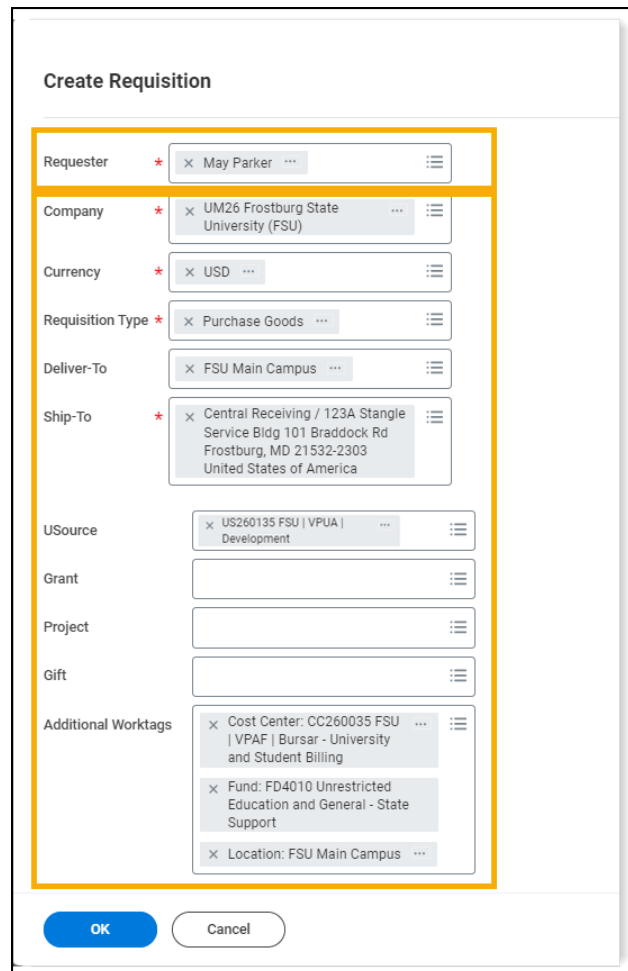
Checkbox



Cart

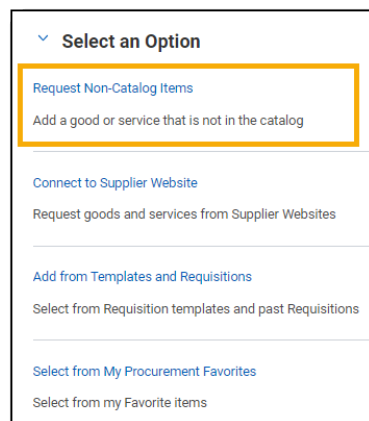
Create Requisition by Requesting Non-Catalog Items

1. Enter **Create Requisition** in the **Search** bar and select the task.
2. The Create Requisition pop up displays.
3. Confirm and make any applicable changes to the following fields:
 - a. **Requester**: automatically populates to your name.
 - b. **Company**: automatically populates to your institution.
 - c. **Currency**: automatically populates.
 - d. **Requisition Type**: use the **Prompt** to select a **Requisition Type**.
 - e. **Deliver-To**: automatically populates.
 - f. **Ship-To**: automatically populates.
 - g. Use the **Prompt** to select one of the following Worktags: **USource, Grant, Project** or **Gift**.
 - h. **Additional Worktags**: automatically populates based on either USource, Grant, Project or Gift selection.



4. Select **OK**.
5. The Create Requisition page displays.
6. Under **Select an Option** section, select **Request Non-Catalog** Items.

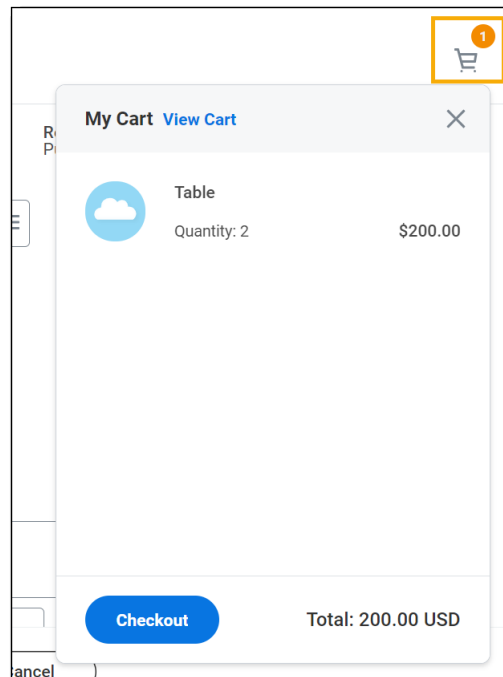
Note: A non-catalog item is the process of placing an order in Workday with a supplier when the goods and/or services are not available in a hosted catalog or website.



7. Use the **Radio** to select either **Request Goods** or **Request Services**.



- a. For **Request Goods**, fill in the following fields under **Goods Request Details** section:
 - i. **Item Description:** enter the *Item Description*.
 - ii. (Optional) **Supplier Item Identifier:** enter the *supplier item information*, e.g. SKU, Catalog Number, or Manufacturer's ID.
 - iii. **Spend Category:** use the **Prompt** to select the **Spend Category**.
 - iv. **Supplier:** use the **Prompt** to select the **Supplier**.
Note: If adding multiple lines, they need to be for the same supplier.
 - v. (Optional) **Supplier Contract:** use the **Prompt** to select the **Supplier Contract** if known.
 - vi. **Quantity:** enter the *Quantity*.
 - vii. **Unit Cost:** enter the *Unit Cost*.
 - viii. **Unit of Measure:** use the **Drop Down** to select the **Unit of Measure**.
 - ix. **Extended Amount:** automatically populates based on the quantity and unit cost entered.
 - x. (Optional) **Memo:** enter any applicable *Comments*.
Note: This memo shows on the Purchase Order line.
 - xi. Select **Add to Cart**.
 - b. For **Request Services**, fill in the following fields under **Service Request Details** section:
 - i. **Description:** enter a *Description* of the Requested Services.
 - ii. **Spend Category:** use the **Prompt** to select the **Spend Category**.
 - iii. **Supplier:** use the **Prompt** to select the **Supplier**.
Note: If adding multiple lines, they need to be for the same supplier.
 - iv. (Optional) **Supplier Contract:** use the **Prompt** to select the **Supplier Contract** if known.
 - v. **Start Date:** use the **Calendar** to select the **Start Date** of the Requested Services.
 - vi. **End Date:** use the **Calendar** to select the **End Date** of the Requested Services.
 - vii. **Extended Amount:** enter the cost of the service.
 - viii. **Memo:** Enter any applicable *Comments*.
Note: This memo shows on the Purchase Order line.
 - ix. Select **Add to Cart**.
8. An **Added to Cart** pop up briefly displays.
 9. The item appears in the **Cart**.



Notes:

- A quantity bubble appears to show how many items are in the cart.
- Selecting the cart shows a pop up display with the cart's details.
- At this point, there is an option to check out or continue shopping.
- To continue shopping, repeat steps 7-9 for the new item(s).
- To check out, continue to step 10.

10. Select the **Cart and **Checkout**.**

11. The Checkout page displays.

Checkout

Company	Requester	Requisition	Status	Total Amount
UM26 Frostburg State University (FSU)	May Parker	RQ-1006	Draft	625.00 USD

Shipping Address

Deliver-To: FSU Main Campus

Ship-To Address: 101 Braddock Road/Stangle Bldg
Central Receiving
Frostburg, MD 21532-2303
United States of America

Requisition Information

Request Date:

Currency:

Requisition Type:

High Priority:

Sourcing Buyer:

Submitted by: May Parker

Freight Amount:

Other Charges:

Memo to Suppliers:

Internal Memo:

Goods

Submit
Save for Later
Continue Shopping
⋮

12. Confirm **Shipping Address** details at the top of the page.

13. Proceed to the **Requisition Information** Section.

- a. **Currency:** automatically populates.
- b. (Optional) **Requisition Type:** use the **Prompt** to change the **Requisition Type** (if necessary).
- c. **High Priority:** not applicable; do not use call purchasing for emergency orders.
- d. (Optional) **Sourcing Buyer:** use the **Prompt** to select the **Sourcing Buyer**.

14. Review the **Goods/Services Lines** for accuracy.

Notes:

- If you did not enter an option for USource, Grant, Project, or Gift in Step 3, it is required to choose one at this point.
- Ensure you select the correct Company Code.

15. If the requisition is shared by multiple worktags, complete the following steps:

- a. Scroll over to **Splits**.
- b. Select the **link**.
- c. Select either **Amount (dollars)** or **Quantity (units)**.
- d. The Splits page displays.
- e. Select the **plus** icon to add the number of worktags to split between.
- f. Select the appropriate worktag for each line.
- g. Enter the appropriate splits (either percentage or dollar amount) for each line.
Note: The total must equal either the dollar amount on the requisition or 100 percent.
- h. Select **Done**.

16. Select the **Attachments** section to **drop** or **select files** pertaining to the requisition.



Notes:

- For Bowie State personnel, a quotation must be attached to the request.
- Examples include quotes, contracts and proposals.

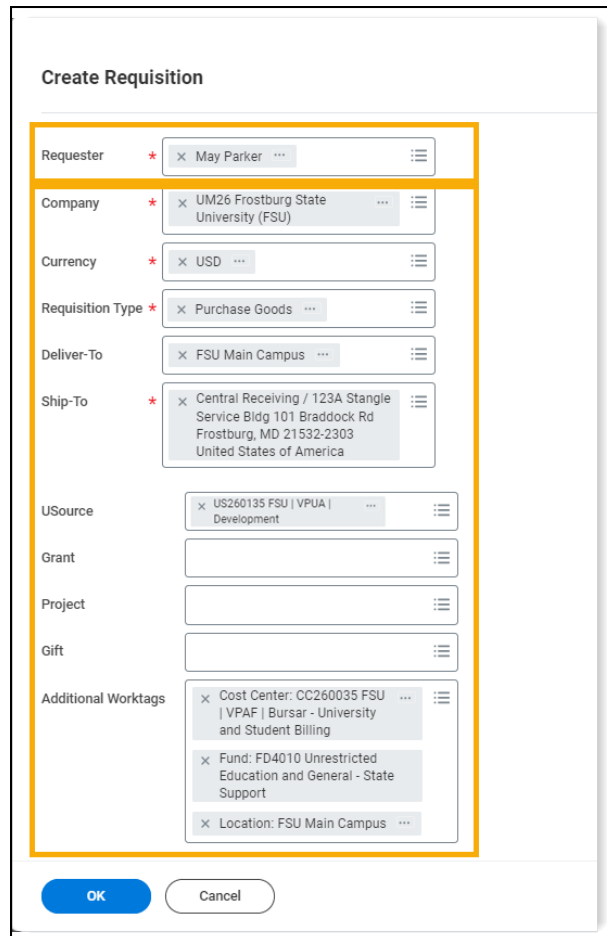
17. Select **Submit**.

Notes:

- For IT-related spend categories, an IT Sufficiency form will appear in your Workday Inbox, and will need to be completed prior to approval of the requisition.
- The requisition routes for approval to the manager of the appropriate driver worktag. SU and UBalt have different approval levels based on the value of the request.
- If the requisition fails budget check, you will receive an inbox item for a budget check override request that must be completed. For more information, please refer to our Budget Check Override Job Aid.
- You will receive a notification when the requisition is approved or denied.
- You can check the progress of the requisition by viewing the requisition process history.

Create Requisition by Connecting to Supplier Website (Punchout)

1. Enter **Create Requisition** in the **Search** bar and select the task.
2. The Create Requisition page displays.
3. Confirm and make any applicable changes to the following fields:
 - a. **Requester:** automatically populates to your name.
 - b. **Company:** automatically populates to your institution.
 - c. **Currency:** automatically populates.
 - d. (Optional) **Requisition Type:** use the **Prompt** to select a **Requisition Type**.
 - e. **Deliver-To:** automatically populates.
 - f. **Ship-To:** automatically populates.
 - g. Use the **Prompt** to select one of the following Worktags: **USource, Grant, Project** or **Gift**.
 - h. **Additional Worktags:** automatically populates based on either USource, Grant, Project or Gift selection.



The screenshot shows the 'Create Requisition' form with the following fields highlighted by a yellow border:

- Requester:** x May Parker
- Company:** x UM26 Frostburg State University (FSU)
- Currency:** x USD
- Requisition Type:** x Purchase Goods
- Deliver-To:** x FSU Main Campus
- Ship-To:** x Central Receiving / 123A Stangle Service Bldg 101 Braddock Rd Frostburg, MD 21532-2303 United States of America
- USource:** x US260135 FSU | VPUA | Development
- Grant:** (empty)
- Project:** (empty)
- Gift:** (empty)
- Additional Worktags:**
 - x Cost Center: CC260035 FSU | VPAF | Bursar - University and Student Billing
 - x Fund: FD4010 Unrestricted Education and General - State Support
 - x Location: FSU Main Campus

At the bottom of the form are two buttons: **OK** (blue) and **Cancel** (white).

4. Select **OK**.
5. The Create Requisition page displays.
6. Select **Connect to Supplier Website** under the **Select an Option** section.

▼ **Select an Option**

[Request Non-Catalog Items](#)
Add a good or service that is not in the catalog

[Connect to Supplier Website](#)
Request goods and services from Supplier Websites

[Add from Templates and Requisitions](#)
Select from Requisition templates and past Requisitions

[Select from My Procurement Favorites](#)
Select from my Favorite items

7. The Connect to Supplier Website page displays.
8. Review the table and locate the supplier to purchase items from.
9. Select **Connect** to be redirected to the supplier's website.
10. The Supplier's website displays.
11. Select **item(s)** to purchase.
12. Use the supplier's cart to check out.
13. You will be returned to Workday to finish checking out.
14. Complete any remaining Workday check out steps.

Notes:

- For IT-related spend categories, an IT Sufficiency form will appear in your Workday Inbox, and will need to be completed prior to approval of the requisition.
- The requisition routes for approval to the manager of the appropriate driver worktag. SU and UBalt have different approval levels based on the value of the request.
- If the requisition fails budget check, you will receive an inbox item for a budget check override request that must be completed. For more information, please refer to our Budget Check Override Job Aid.
- You will receive a notification when the requisition is approved or denied.
- You can check the progress of the requisition by viewing the requisition process history.
- Once approved, Workday generates and transmits a Purchase Order to the supplier.