FIN: Requisition Event

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.

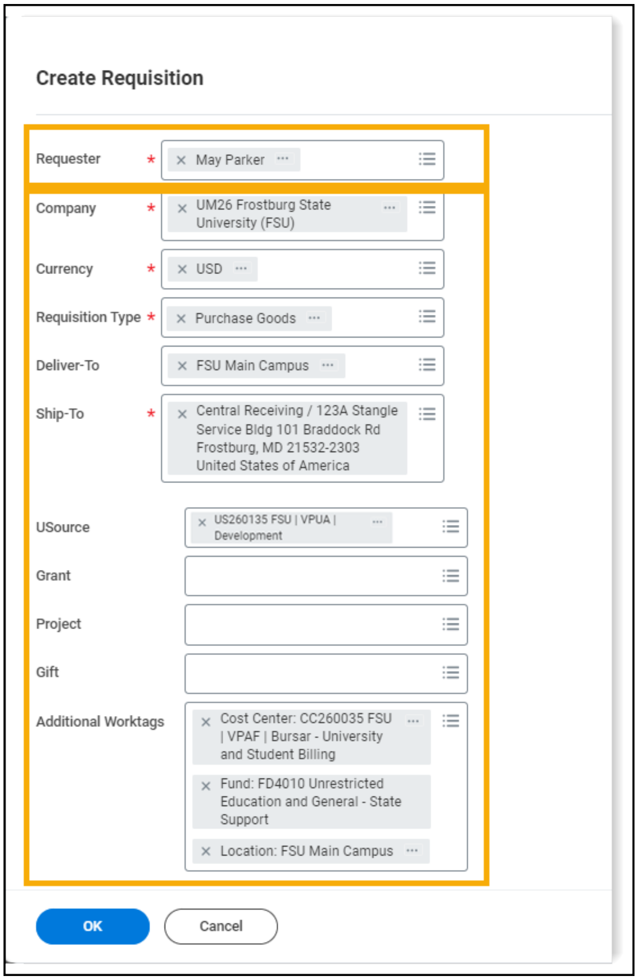
Icons Referred to in This Document

Required Field   Radio   Prompt   Checkbox

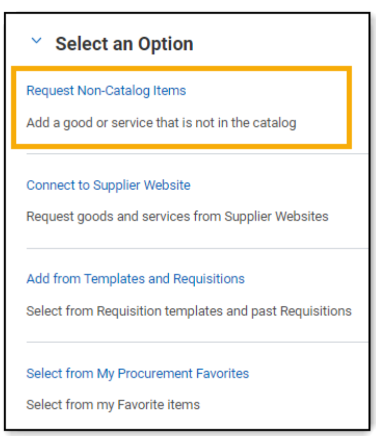
Cart

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.

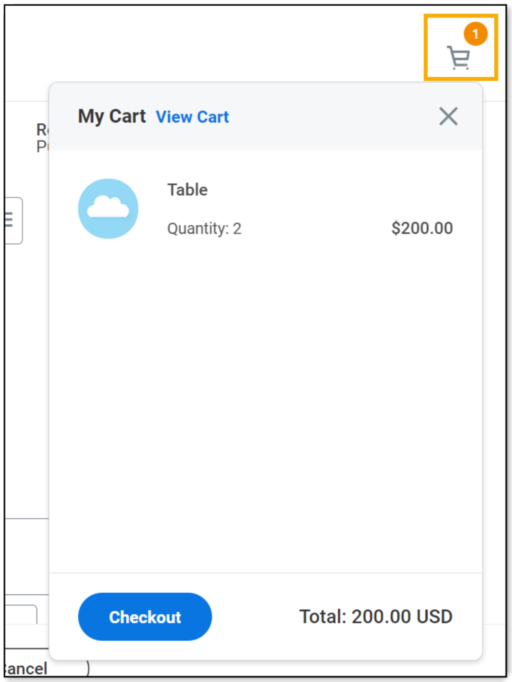


7. Use the **Radio** to select either **Request Goods** or **Request Services**.

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**.

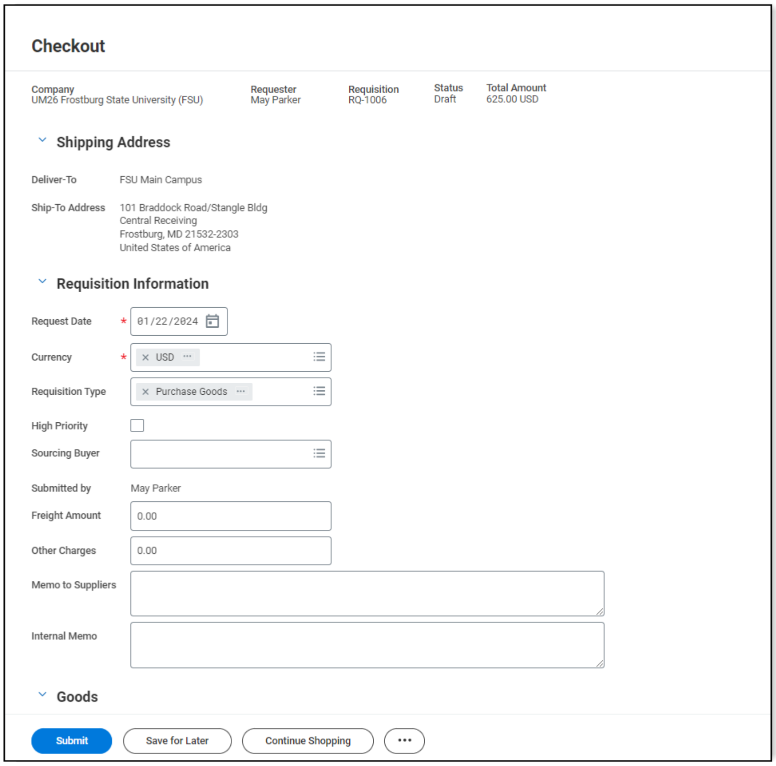
8. An **Added to Cart** pop up briefly displays.
9. The item appears in the **Cart.**



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.



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.

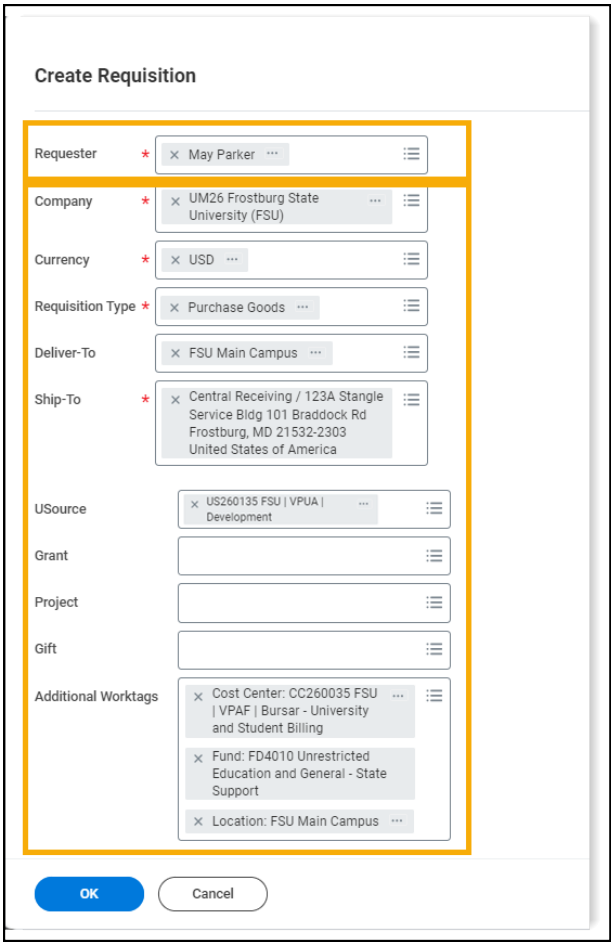
17. Select **Submit.**

Notes:

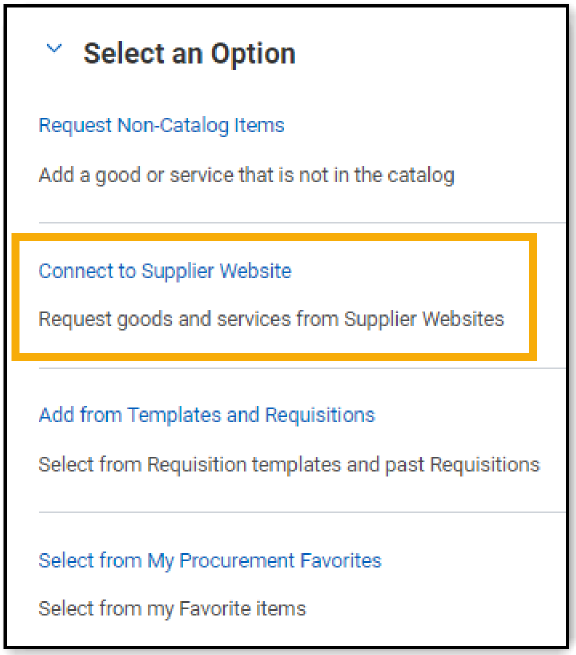
- For IT-related spend categories, an IT Sufficiency form will appear in your Workday Inbox, and will need to be completed prior to approval of the requisition.
- The requisition routes for approval to the manager of the appropriate driver worktag. SU and UBalt have different approval levels based on 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.



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



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.