HOW TO CREATE A REQUISITION

WHAT IS A REQUISITION?

A requisition is an official request – submitted through Workday – for purchasing goods or services. Once submitted, requisitions will undergo a series of approvals. Once approved, the purchasing department will create a purchase order (PO) which allows for official engagement with the supplier for the goods or services needed.

In this QRG, we will provide a step-by-step guide on how to create a typical requisition for the purchase of Non-Catalog Items.

STEP 1: SEARCH & SELECT "CREATE REQUISITION" IN WORKDAY

STEP 2: CHANGE REQUESTER, IF NEEDED

Fill out this initial requisition screen in order from top to bottom. Fields are prone to resetting or defaulting when entered out of order.

Firstly, if needed, change the name of the requester. For taggable inventory items, the asset will be assigned to the listed requester.
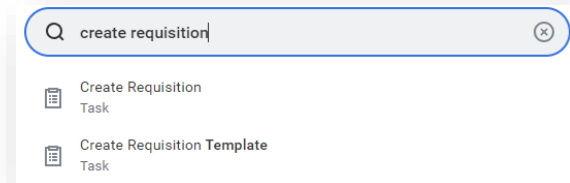
STEP 3: SELECT REQUISITION TYPE

The following are commonly used Requisition Types and their appropriate use cases:

Type	Use Case	Examples
Standard	**This is our Default Standard Requisition Type. Applicable to most purchases.** Quote(s) should be attached.	Anticipated goods and services (ex. supplies, equipment, or lab services)
Bill Only Not Transmitted (BONT)	**Used when goods/services have already been received and an invoice is received without an established requisition or PO.** Invoice should be attached.	Official function meals, minor maintenance services, etc.
Framework/Blanket	**Used for recurring and predictable orders of a specified good or service.** Limited to $20K annually for those items/services that are not considered exempt.	Utilities, etc.
Sole Source PO	**Used when requesting to source goods/services over $20,000 through the Sole Source method.** Sole Source form should be completed and attached to requisition.	Monopoly offerings or goods and services compatible with existing products or services, etc.

STEP 4: SELECT DELIVER-TO & SHIP-TO ADDRESSES

Select the Deliver-To first and confirm the Ship-To matches the street address of the selected Deliver-To.

The "Deliver-To" field can specify the name of a building, a larger location, an organizational segment (ex. AES, CES), or it can be used to designate a specific room number within a building.

Example: the Deliver-To and Ship-To below correspond to the same location.

These fields are also searchable to quickly look up and select locations

STEP 5: ADD WORKTAGS

Enter a driving worktag, such as **Designated**, **Grant**, **Program**, or **Project**.

Assigned related worktags will default on to the requisition from the worktag chosen, such as the NACUBO function, site, & cost center. A grant or project worktag should assign a REEport. If not, a REEport will need to be manually selected.

If unsure what worktags to use, consult with the end user on which worktags should be selected.

STEP 6: CLICK OK

STEP 7: CLICK REQUEST NON-CATALOG ITEMS

Request Non-Catalog Items

Add a good or service that is not in the catalog

Alternatively, you can select Connect to Supplier Website to purchase through a punch-out session with Amazon, Staples, Office Depot, American Paper & Twine, etc.

STEP 8: ENTER ITEM DETAILS

First and foremost, select if the line item you are entering is for **goods** or **services**.

For goods, enter the item details, including item description, spend category, quantity, unit cost, and unit of measure (see example below).

For services, enter a description of the service, spend category, and cost of the service in the Extended Amount section.

When in doubt, select services. Even goods can be entered as services when you need to take advantage of how service lines function in Workday. For example, multiple supplier payments can be made on one service line, but only one payment can be made on a given goods line.

Framework/Blanket: always select services.

Non-Catalog Request Type

- ● Request Goods
- ○ Request Service
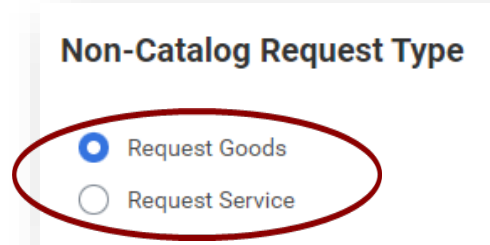
Goods Request Details

Item Description	*	Unleaded Gasoline
Supplier Item Identifier		
Spend Category	* Recommended	SC0085 Office Supplies SC0069 Fuel SC0036 Gas Services SC0034 Other Services SC0007 Other Supplies
		× SC0069 Fuel ···
Supplier		
Supplier Contract		(empty)
Quantity	*	250
Unit Cost		3.31
Unit of Measure	*	Gallon
Extended Amount		827.50

STEP 9: SELECT SUPPLIER

Enter the supplier for the goods or services being ordered. This field is also searchable. You can search by name or alternate name.

STEP 10: ADD A MEMO, IF NEEDED

Add any notes pertaining to this line, if needed. Keep in mind: this memo is for the supplier and will be printed on the PO to the supplier. Later, there will be an opportunity to create an internal memo for the buyer or other approvers.

STEP 11: CLICK ADD TO CART

Continue Shopping   Add to Cart   Cancel

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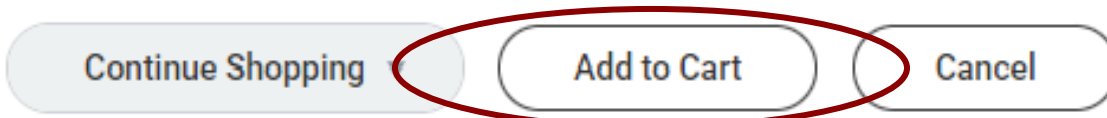
STEP 12: ADD ANY ADDITIONAL GOODS & SERVICE ITEMS

If needed, repeat steps 7 through 10 to add any additional goods or services needed for the requisition.

Generally, the same supplier should be selected for all additional goods or services being requested.

STEP 13: CLICK SHOPPING CART AND CHECKOUT

Click the shopping cart in the top right corner, review items in your cart, and click checkout (example below).

STEP 14: ADD A MEMO TO SUPPLIER OR AN INTERNAL MEMO, IF NEEDED

Add any notes for the supplier in the Memo to Suppliers section (memos here **will** be sent to the supplier). Additionally, add contact information for main points of contact (internal & supplier), including phone and email if available.

Add any notes pertaining to the requisition that may be helpful to the buyer or other approvers in the Internal Memo Section.
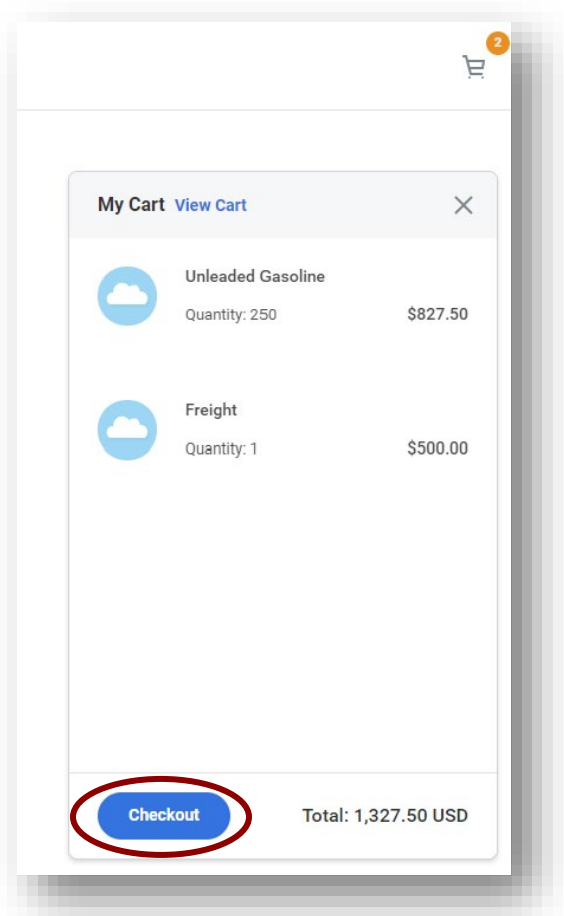
For item descriptions and supplier memos, try to describe the goods or services as described on the supplier's documentation. An internal memo is the perfect location to provide more common-language descriptions or a short purpose or justification for the purchase.

STEP 15: REVIEW GOODS & SERVICE LINES

Verify that the lines in each section are correct. Edit as needed.

Common sections that may need additional review or updates include:

- **Ship-To Contact:** If needed, change the ship-to contact on each line if the individual receiving the order is someone other than yourself.
- **Supplier Order-From Connection:** If needed, select an applicable Order-From Connection; matching the supplier address from their quote document (use the same Order-From Connection on every line). This is also used to define the alternate name for the supplier.
- **Taxes:** Workday automatically calculates taxes based on Spend Category and Ship-To Address. Manually update Tax Applicability and Tax Code, if needed.

My Cart View Cart ✕

Unleaded Gasoline
Quantity: 250 $827.50

Freight
Quantity: 1 $500.00

Checkout   Total: 1,327.50 USD

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STEP 16: UPLOAD ALL APPLICABLE ATTACHMENTS

In the Attachments drop-down section, drag and drop all applicable files related to the requisition.

Common attachments include:

- Bid Tabulation Sheet
- Completed/Fully Executed Contract
- Contract & Grant Disclosure
- Contract/Legal Review Form
- Official Function Form
- Sole Source Procurement Request Form
- Supplier Invoice
- Supplier Quote(s)

STEP 17: CLICK SUBMIT

The creation of the requisition is now complete, and Workday will generate and provide you with an RQ#.

From here, the requisition will go through approvals. Be on the lookout: the requisition may be in your Workday My Tasks inbox for you to approve as the first approver.

If the requisition requires changes, an approver may send the requisition to your Workday inbox for updates. You can search My Requisitions in Workday to view a complete report of your requisitions currently in progress.

Once all approvals are complete, the purchasing department will convert the requisition into a purchase order (PO). Workday will send you an email confirmation of this, and the buyer will also contact you with a copy of the PO and advise you of any further action to be taken.