Workday Quick Reference Guide

PURCHASE REQUISITIONS: Create a Purchase Requisition

To complete a purchase requisition for a non-catalog item, you must add item(s) to the cart and complete checkout.

ADD AN ITEM TO THE CART

1. Enter 'Create Requisition' in the search bar and select the task.

The Create Requisition screen displays.

2. The **Requester** will default to your name.

3. For **Requisition Type**, select or type Standard.

4. Delete the **Deliver-To** address (it will cause an error).

5. Leave the **Ship-To** address as it defaults (200 Whittington Ave Hot Springs, AR 71901 United States of America.

6. Worktags - the combination of these items will determine which budget will be used to make this purchase. Worktags consist of the following items:

7. **Cost Center** will populate with your default department.

   a. If you intend to use your departmental budget for this purchase, leave all values as they defaulted.

   b. If you want to use a different budget, you will need to update this information by DELETING ALL Worktags and entering the new ones.

   c. If you are using a Grant or Designated fund, enter your grant/designated Worktag first. The additional values will auto populate.

   d. If this purchase will be split between budget sources, enter one of the sources here. You will add the additional sources in a later step.

      *Contact Finance if you need help with this information

8. Click the **OK** button.

A new Create Requisition screen displays.

9. Click the **Request Non-Catalog Items** hyperlink.

The Request Non-Catalog Items screen displays.

10. Select **Request Goods** or **Request Services**.

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11. Enter the **Item Description** for your FIRST item. List only ONE item in this step. You will be able to additional items/lines later in the process.

   If you have built an online cart or have a quote, you can copy and paste the information. This needs to be as accurate as possible to ensure we order what you intend to purchase. Please do not use generic descriptions.

   Example, *Small Pipets (package of 20)*

12. If you have an item number, enter it in the **Supplier Item Identifier** box.

13. Select **Spend Category**. Use the 'Spend Categories by Hierarchy' list. Most purchases will be in one of the following categories:

   * Educational Supplies & Materials

   * Equipment (only if over $2,500)

   * General Services

   * Materials and Supplies

14. Select **Supplier**. If you are unable to find your supplier, leave this field blank. You will provide further information on the next page. You will build ONE cart per supplier.

15.

For Goods requisitions:	*For Service requisitions:*
Enter the **Quantity.** Enter the **Unit Cost**. Select the **Unit of Measure**. Check the **Extended Amount**.	Enter the **Start Date** Enter the **End Date** Enter the **Extended Amount**

16. Click the **Add to Cart** button at the bottom.

17. Repeat steps 11 – 16 to add additional items to your requisition.

18. Add an additional line if there will be shipping/freight charges for your purchase.

   a. **Item Description** – Shipping

   b. **Spend Category** – Type "freight" and press enter. This should default to SC0014 Freight.

   c. **Quantity** – 1

   d. **Unit Cost** – enter the amount

   e. **Unit of Measure** – Select "Each"

   f. Add to Cart

19. When finished, click on the shopping cart icon in the top right corner of your screen.
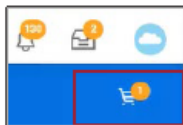
20. Check the **Checkout** button.

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CHECKOUT PROCESS

21.   Leave all fields as they populate. Do not include **Freight Amount** here. You should have already added a line for shipping/freight.

22.   If you need to include a quote number or other information on the purchase order when it is sent to the supplier, enter the information in the **Memo to Suppliers** box.

23.   If you did not select a supplier on the previous screen, provide the necessary information in the **Internal Memo** box. For example, *Order from www.carolinabiological.com*.

24.   REQUIRED - Enter a justification/reason for this purchase in the **Internal Memo** box.

25.   Scroll down to the **Goods** or **Services** section depending on the Non-Catalog Request Type you chose in step 10.

26.   If everything was entered correctly as you built your cart, there is no need to make any changes.

- If changes are necessary, you can make them here.
- If you need to add additional lines, you may do so by using the + sign in the upper left corner.
- If your purchase will be split between multiple budgets, scroll all the way to the right and choose the **Splits** icon for that line.

27.   If you have attachments, click the arrow next to **Attachments** to drag and drop or select files. Please include quotes, invoices, contracts/term and conditions, screen prints of shopping carts, communication with the supplier, etc.

28.   Review your requisition. Scroll to the top of the page and check the **Total Amount** in the upper right hand corner of the screen.

29.   Once complete, select the **Submit** button at the bottom of the screen.
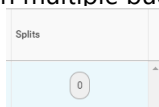
NEXT STEPS

Your requisition will route through electronic approvals. This includes your Cost Center Manager (budgetary head).

Once your requisition is fully approved/processed, ASMSA Finance will issue a purchase order and place your order. For most purchases using the ASMSA credit card, a PO will not be generated.

When you order is placed, you will receive a Workday notification. You will see this notification in the bell at the top of the home screen. Click on the bell to open your notifications. For orders placed using the ASMSA credit card, you may receive a copy of your order by email instead.

You will see a **Comment Notification.** Click on the **View Purchase Order** button to see the purchase order. To clear the notification, click in the blue circle.