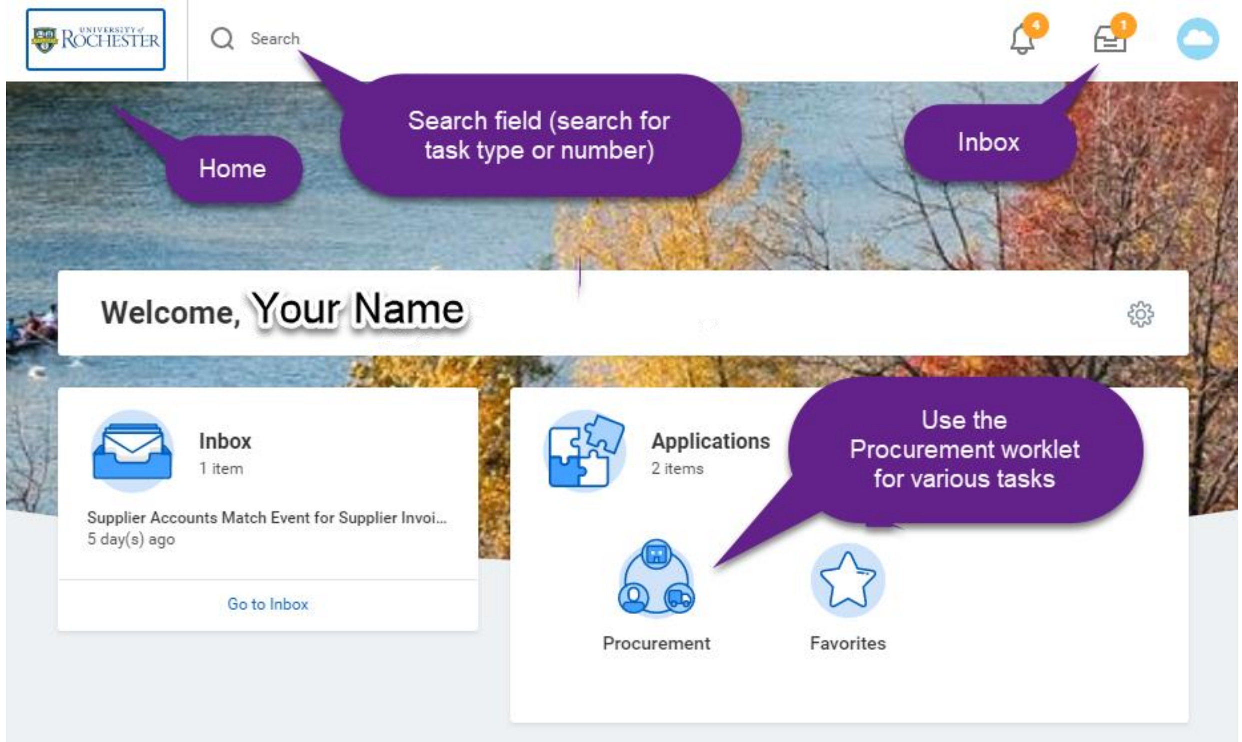
Workday Procurement – Create Requisition for Non-Catalog Goods or Services

Implementation Tenant - https://wd5-impl.workday.com/rochester3

<table>
<tr><th>Instructions</th><th>Details and Screenshots</th></tr>
<tr><td>Home page:
Use the UR logo to return to this Home screen
Use the Global Search field with keywords
Use the Inbox icon for Workday messages
Use the Procurement dashboard for frequently used tasks and reports
Create Requisition</td><td>
</td></tr>
<tr><td>Rules</td><td>Enter all line items from the quote
Only 1 supplier per requisition
Only 1 company per requisition (can have multiple FAOs within the same company)
Upon final workflow approval the requisition becomes a Purchase Order (PO) and will be sent to the supplier</td></tr>
</table>

<table>
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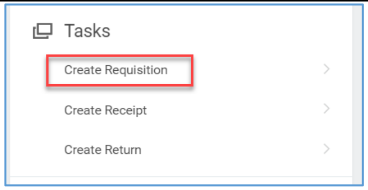
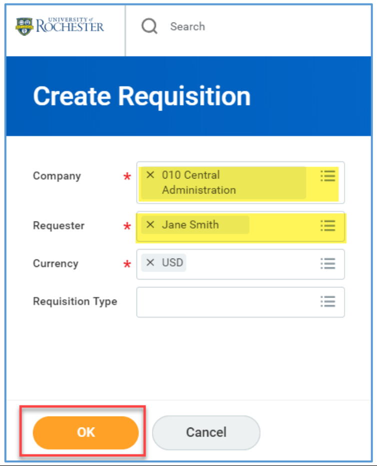
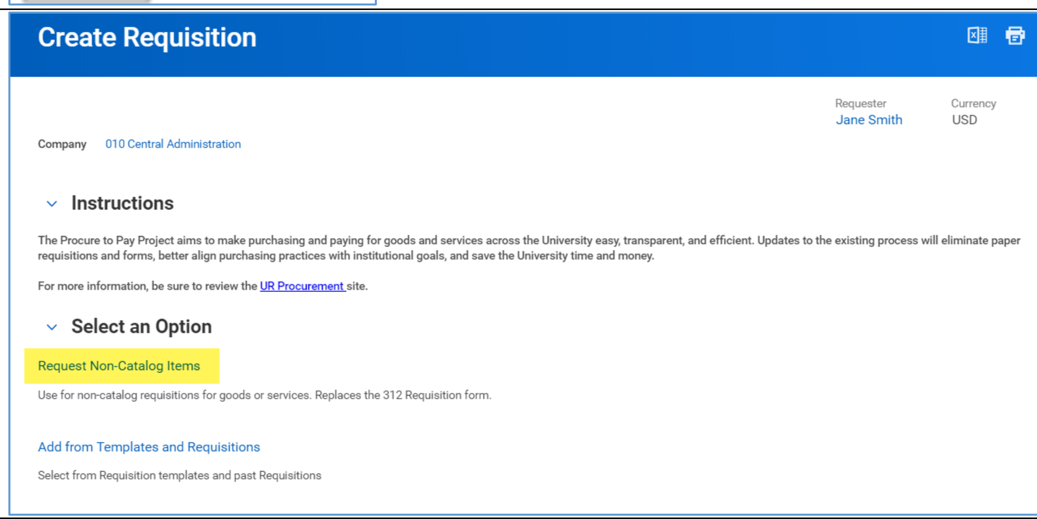
<tr><td>From the Procurement dashboard, choose Create Requisition and enter the required information

Select the appropriate Company
Change Requester name if doing the requisition on behalf of someone
Select <OK>
</td>
<td>


</td></tr>
<tr><td>
For non-catalog requisitions, select <Request Non-Catalog Items>.
To copy a previous non-catalog requisition or to order from a pre-defined template (covered later in this guide), select <Add from Templates and Requisitions>
</td>
<td>
</td></tr>
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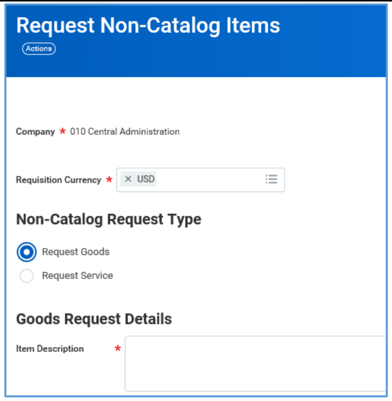
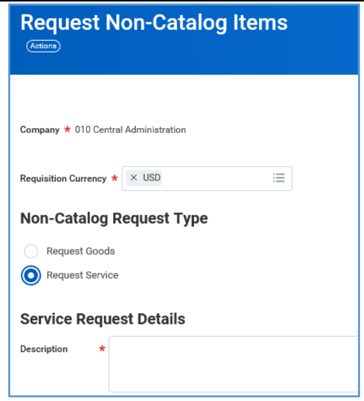
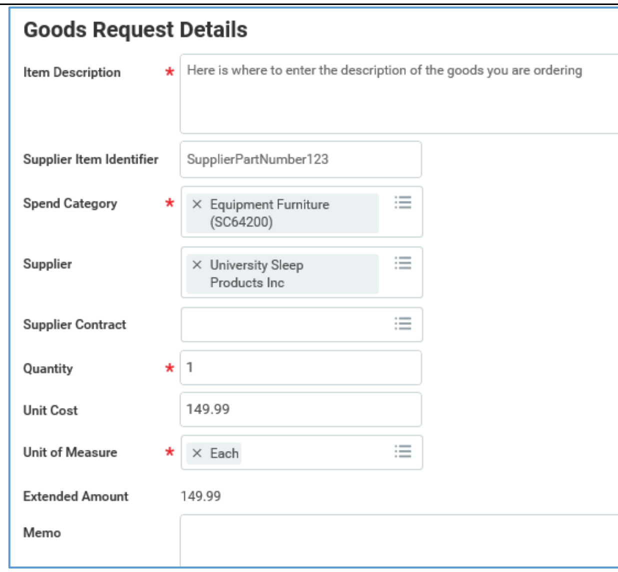
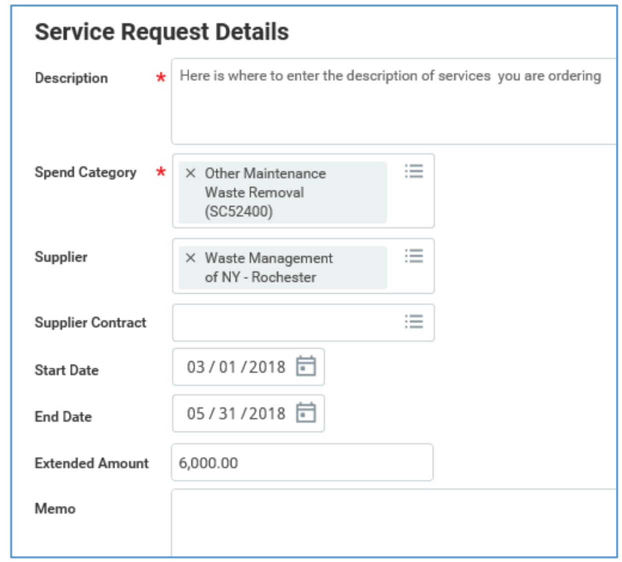
<tr><th>Instructions</th><th>Details and Screenshots</th></tr>
<tr><td>Non-Catalog Request Type: Goods vs Services

The Non-Catalog request type will default to Request Goods
Be sure to change the radio button selection to switch for requesting Service
</td><td>




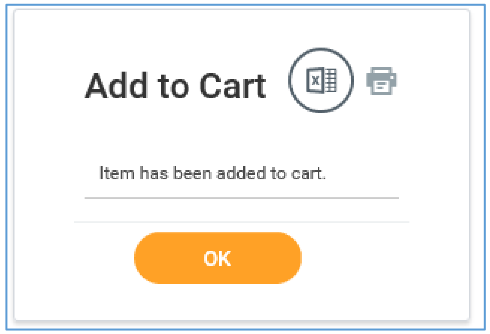
</td></tr>
<tr><td>Request Non-Catalog Items – Goods vs Service continued

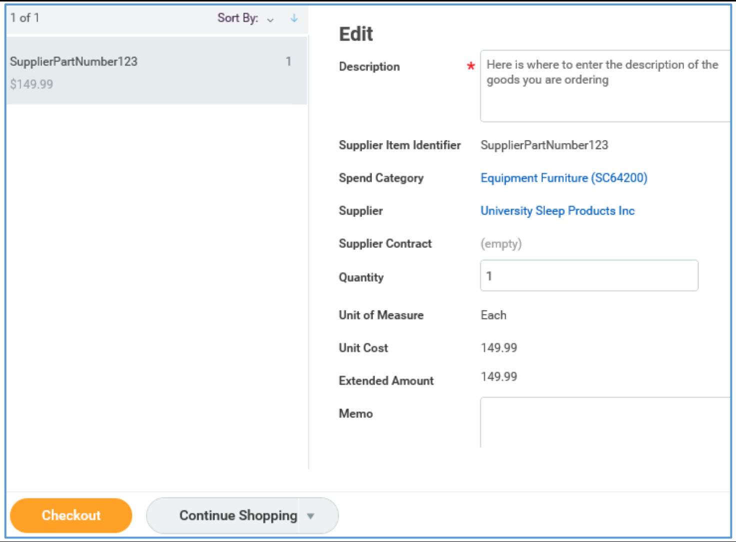
Shown are two samples
Include the quote number in the item description, if applicable
Spend Category can be searched by a partial name or the spend category number, beginning with SC
Choose an existing supplier or leave the supplier blank and Procurement will initiate the Request for Quote (RFQ) to select a Supplier
</td><td>


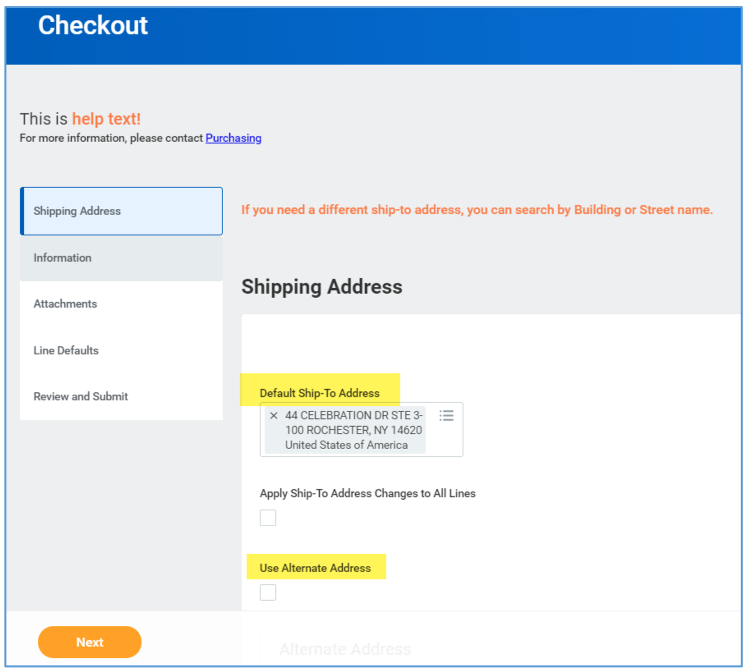


Goods request has a quantity, unit cost and unit of measure. Include the supplier part#, mfg#, lot# or serial# in the Supplier Item Identifier field.

Service request has a start date, end date and extended amount
</td></tr>
</table>

Instructions	Details and Screenshots
Select <**Add to Cart**> And then <**OK**>	 
Can fill in another line if additional lines are needed • If additional lines are needed, repeat the above step • If additional lines are needed for different suppliers, the req will split into multiple purchase orders. Therefore it is recommended to hold off and finish the current request for a given supplier • If no additional lines are needed, select the shopping cart icon	

Instructions	Details and Screenshots
• The shopping cart contains the lines that have been added • Select <**Checkout**>	

The checkout section is made up of five sections (tabs)
• **Shipping Address**
  ○ The default ship to address can be changed to a different UR address on file.
  ○ Can search by location name, street or room.
  ○ An Alternate Address can be used for non-UR addresses. Select the **Use Alternate Address** checkbox and then <**Add**> to fill in the complete shipping address
	

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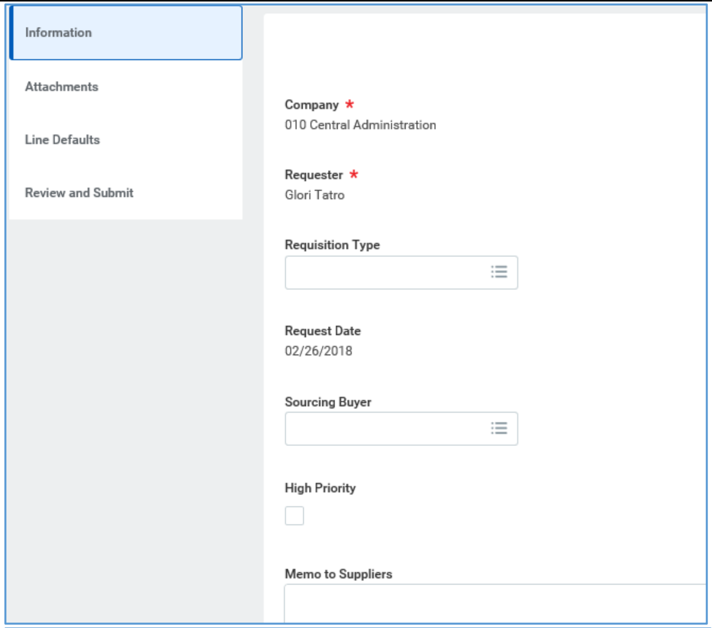
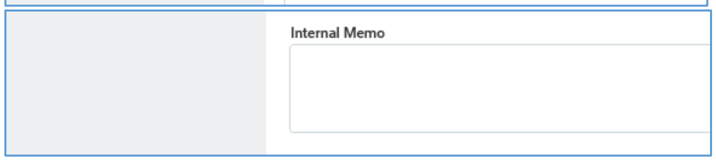
Requisition Checkout - Continued

- **Information**
  - Do not use *Sourcing Buyer* field.
  - High Priority checkbox for Rush Orders
  - **Memo to Suppliers** field can be used for a text note that is included on the purchase order to the supplier
  - **Internal memo** is an internal note to your approvers, is not included on PO

</td><td>





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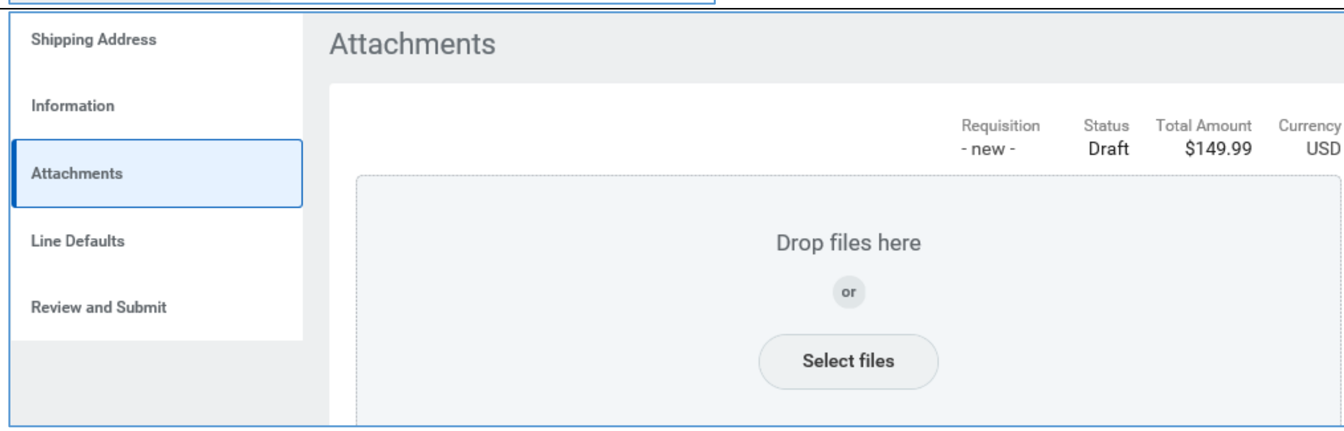
Requisition Checkout - Continued

- **Attachments**
  - Required for goods orders >$2500 or any value services orders.
  - Used to attach quotes, statements of work, sole source justification, price justification, etc.
  - Drag and drop attachments or use the <**Select Files**> button to attach

</td><td>



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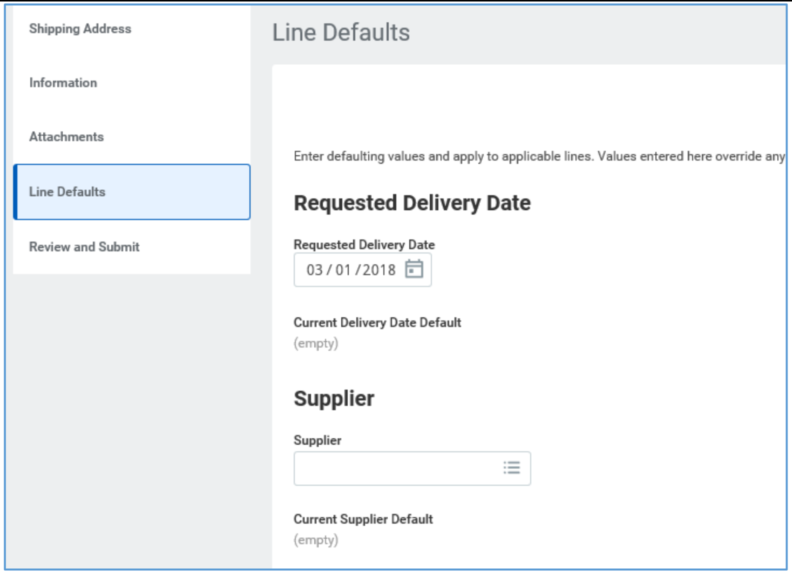
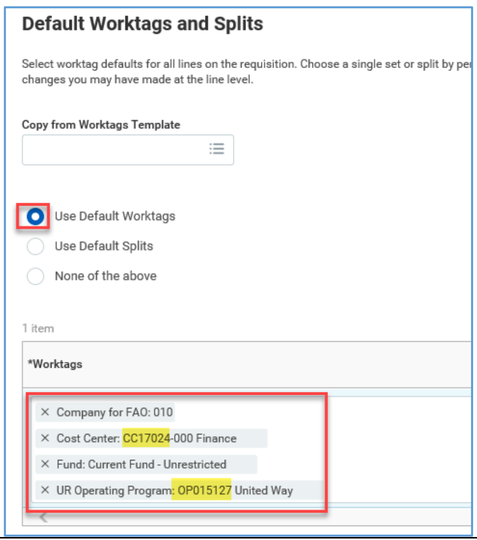
Instructions	Details and Screenshots
Requisition Checkout - Continued • **Line Defaults** ○ Changes made on this tab will propagate onto each line on the requisitions ○ Goods requisitions require a **Requested Delivery Date** ○ Keep in mind that if the Requested Delivery Date is less than five days in the future, you could incur additional shipping charges ○ RFQ Requirements – *Do not use* at this time. ○ Default Worktags: select <**Use Default Worktags**> radio button to enter FAO. These worktags will propagate to all lines ○ In this example, search on the operating program or cost center number and press <**Enter**>	 

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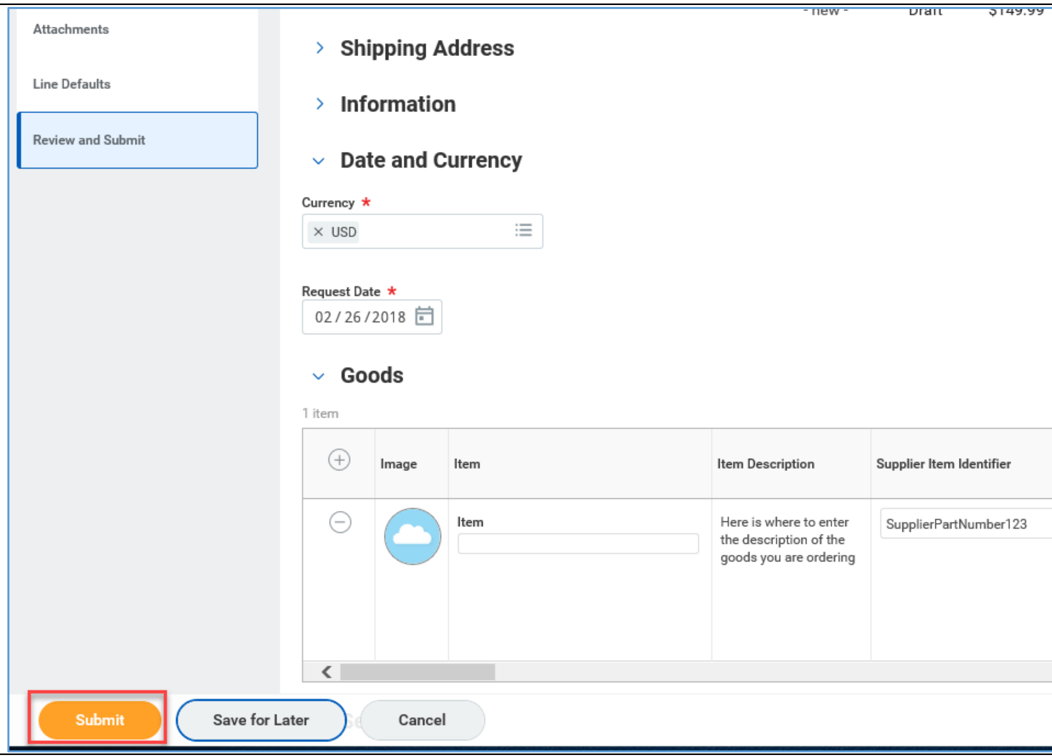
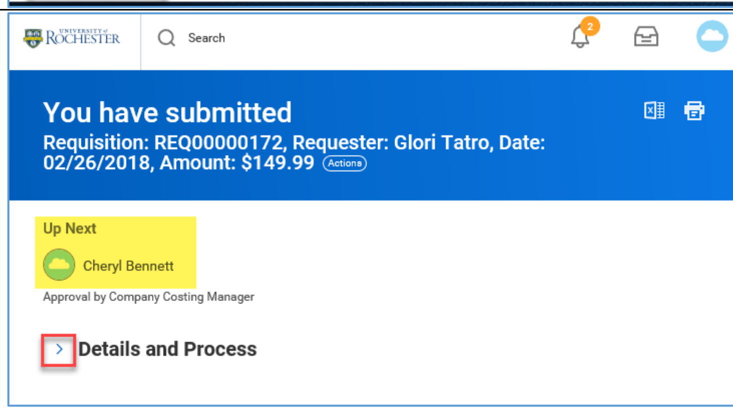
<tr><td>Requisition Checkout - Continued
• Review and Submit
○ Make any changes needed on individual lines if needed
• Select <Submit> to submit the requisition for approval</td><td>
</td></tr>
<tr><td>• Take note that the requisition has been submitted, the requisition number, and who is up next in the approval sequence
• Can also expand the view to see the details and the approval sequence steps by selecting ></td><td>
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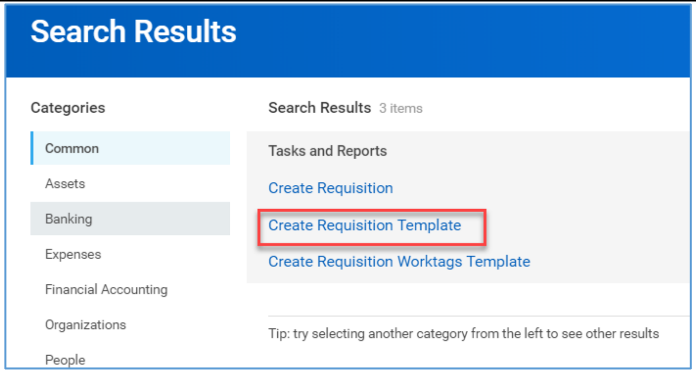
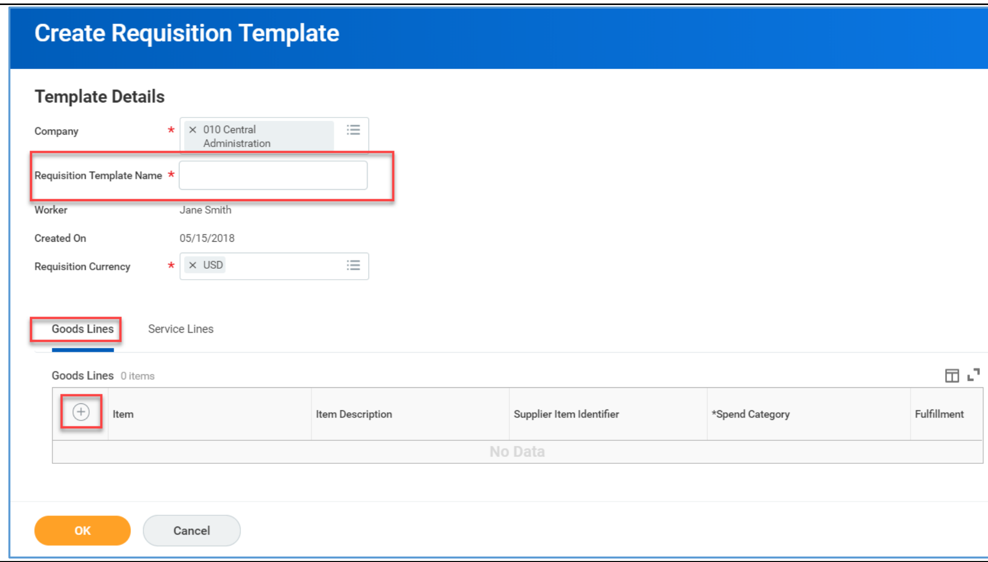
Instructions	Details and Screenshots
<u>Requisition Templates</u> can be set up for frequently used. • From the Global Search field, enter <create requisition> and press Enter to search.	
Enter a Requisition Template Name for this template • Goods lines and/or Services lines can be added • Select the + icon to add lines for the template	

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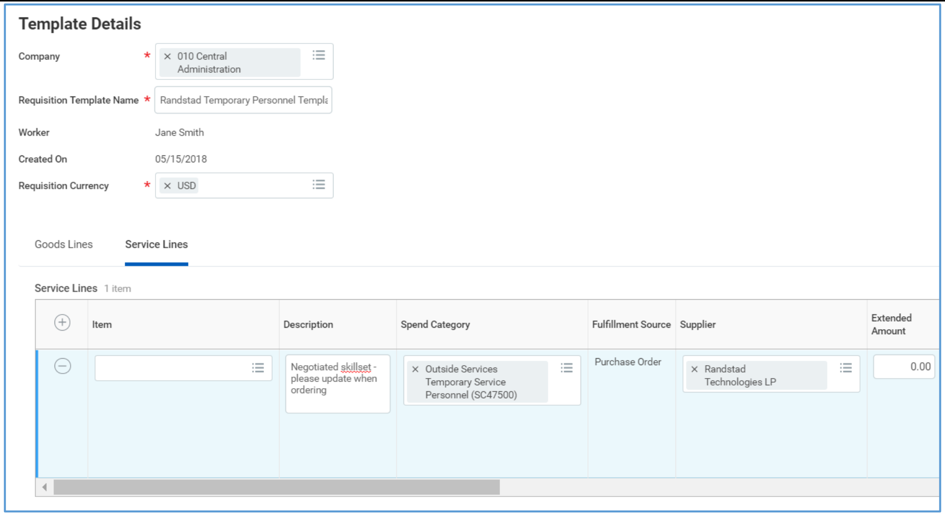
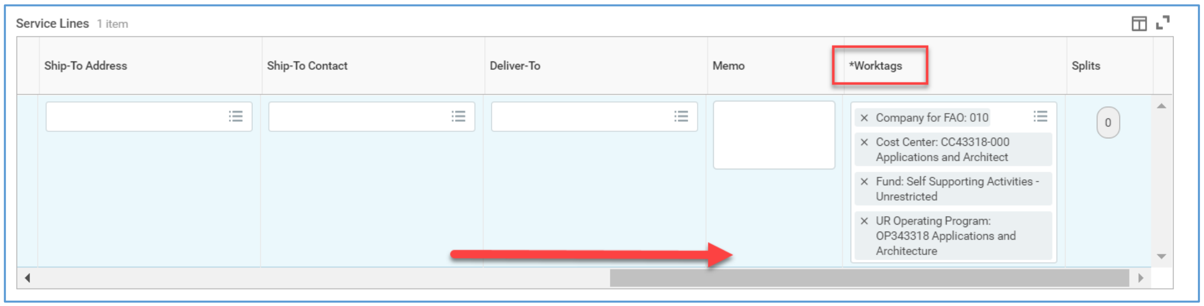
For the purpose of this guide, we will show a Services line for temporary personnel with a specific supplier.

- Do not enter an Extended Amount since this can be customized each time you order using the template
- Do not enter Ship-To Adress or Contact or Deliver-to since this can be customized each time you order using the template
- For the Worktags field, search on your FAO and select <**Enter**>. All related worktags will populate.
</td><td>


Scroll to the right to fill in more fields…



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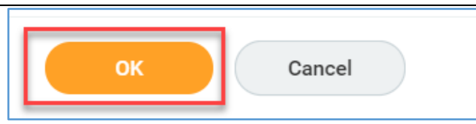
<tr><td>Select <OK> when done.</td><td>


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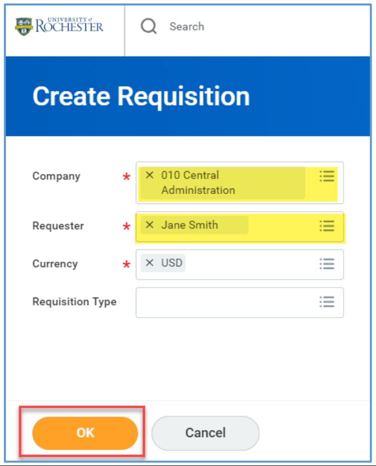
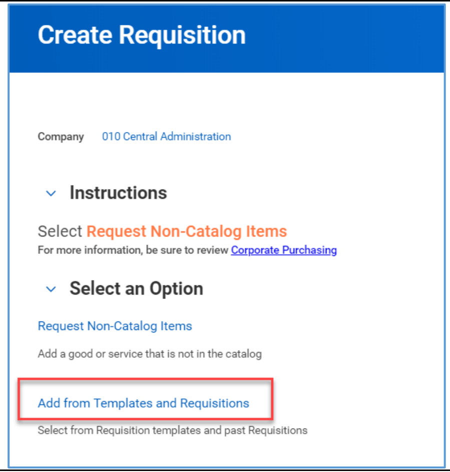
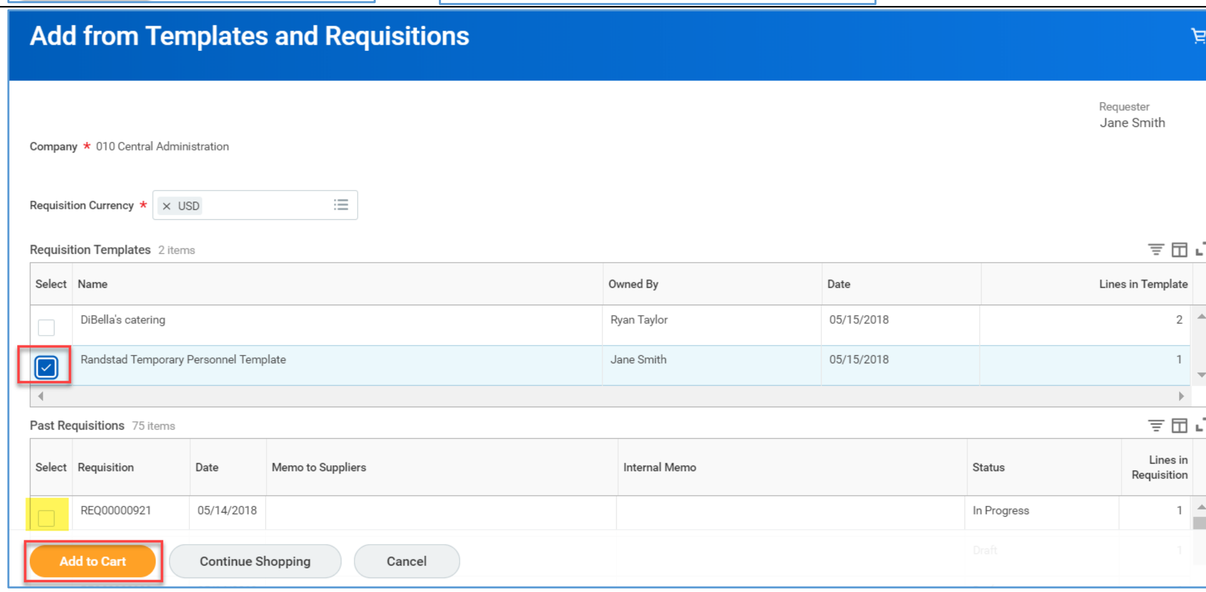
<tr><td>To order using the new template, or to copy a previous requisition, select the <Create Requisition> option, update the information if necessary.
Select <Add from Templates and Requisitions>.</td>
<td>


</td></tr>
<tr><td>From this screen, you can order from an existing template or create a copy of a past requisition.
Select the checkbox next to the template from which to order. When selected, it will take you to your Cart where you can continue the checkout process.
Select <Add to Cart>
You can also copy a past requisition by selecting the checkbox and selecting <Add to Cart></td>
<td>
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