

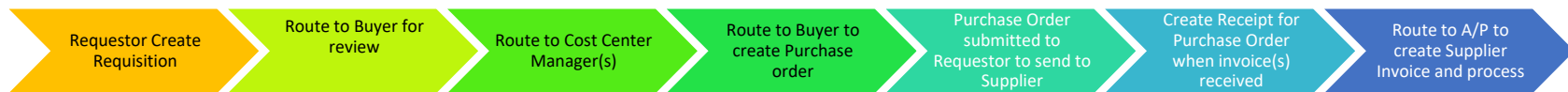
Create Requisition

QUICK TAKE: Create Requisition

Create Requisition

- For Purchases over \$1000, requisitions is require
- If Supplier does not take credit card and amount is less than \$1000, requisition can be submitted
- When creating a requisition, more than one Supplier an be created
 - Once requisition is approved, a Purchase Order will be created for supplier submitted in Requisition
- Submit Requisition for Goods or Services
- Requestors can create more than one Requisition at a time
- If a purchase order needs to be treated as a blank purchase order it is recommend to use Requisitions for Services. This way when a receipt is created, it can be created for a lower dollar amount.

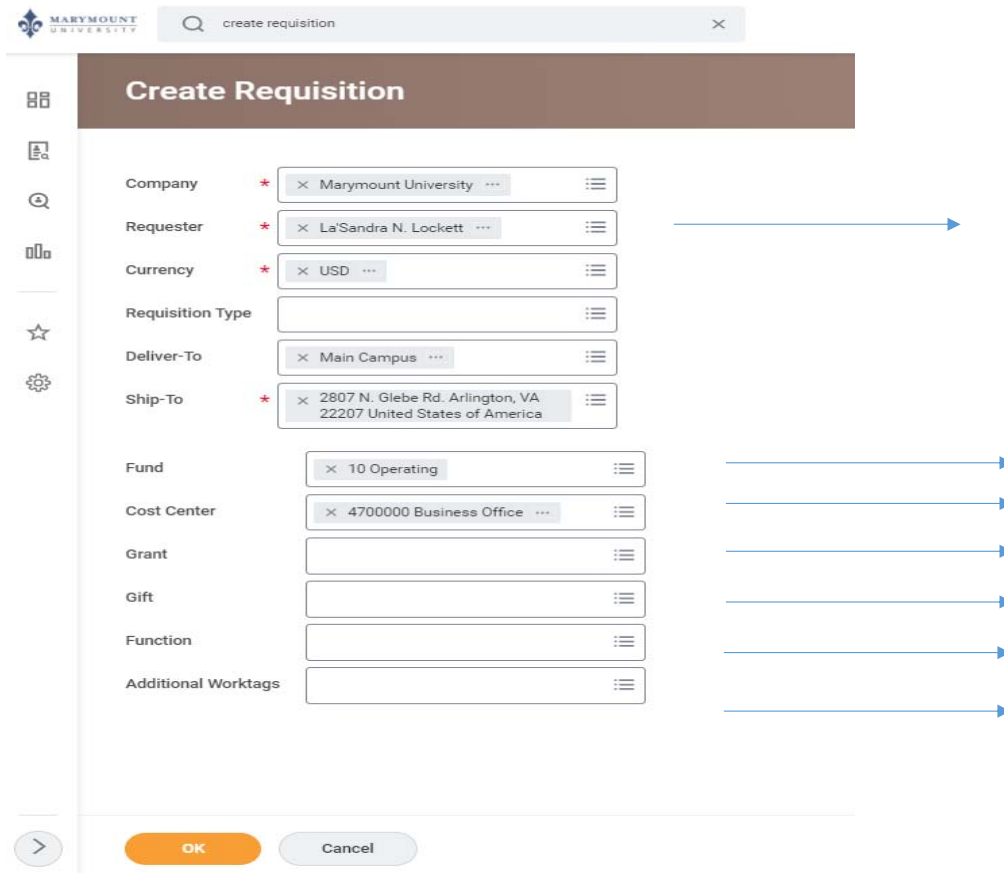
Requisition to Purchase Order



- Department Requestor “Create Requisition”
- Once request has been complete – Request routes to Buyer for review
- After Buyer reviews, request is route to Cost Center Manager(s)
- Once approved by Cost Center Manager(s) request routes to Buyer to create purchase order
- Buyer will submit Purchase Order to Requestor
- Requestor will submit Purchase Order to Supplier
- Requestor will create receipt to purchase order when invoice(s) is receive
- Receipt route to A/P for processing

Creating Requisitions

RED * information is required



Create Requisition

Company *

Requester *

Currency *

Requisition Type

Deliver-To

Ship-To *

Fund

Cost Center

Grant

Gift

Function

Additional Worktags

OK Cancel

Requestor is Person create Requisition – Name automatically populates.

- Name can change if Requisition is being created on behalf of someone.
- Any employee with Workday access can create a requisition.

Fund and Cost Center will automatically populate based on Requester.

- Submitting a requisition for Grant or Gift, remove the Fund and Cost center, then select the Grant or Gift.
- The Fund and Cost Center will automatically update depending on the Grant or Gift selected.

Creating Requisitions

Create Requisition



Company
Marymount University

Requester
La'Sandra N. Lockett

Currency
USD

Instructions

REQUISITION INSTRUCTIONS

Before you process your requisition, please refer to the Company Procurement Policy here. If you have questions or need additional assistance, please submit a ticket with the helpdesk.

Quick reference guides can be found here to assist with your request.

Select an Option

Request Non-Catalog Items

Add a good or service that is not in the catalog

Click on Request Non-Catalog Items to Create Requisition

Add from Templates and Requisitions

Select from Requisition templates and past Requisitions

Select from My Procurement Favorites

Select from my Favorite items

Request Type: Request for Goods

Request Non-Catalog Items
PR

Requisition Currency *

Non-Catalog Request Type

Request Goods
 Request Service

Goods Request Details

Item Description *

Supplier Item Identifier

Spend Category *

Supplier *

Supplier Contract (empty)

Quantity *

Unit Cost

Unit of Measure *

Extended Amount 0.00

Memo

- There are two options:
- Request for Goods or
 - Request for Service

The screen will change depending on which request type is selected.

Requestors can create more than one Requisition at a time.

Request Type: Request for Goods

Request Non-Catalog Items

Requisition Currency *

Non-Catalog Request Type

Request Goods
 Request Service

Goods Request Details

Item Description *

Supplier Item Identifier

Spend Category *

Supplier *

Supplier Contract

Quantity *

Unit Cost

Unit of Measure *

Extended Amount 250.00

Memo

Add to Cart
Continue Shopping
Cancel

Any time you see the red * information is required

- Spend Category in Workday is similar to Object Code in Legacy System
 - Requestor can type in the name of spend category or click on the icon to select from the list
- Supplier – Is know as vendor in Legacy System
 - Search for Supplier by Name or click on icon to review list of suppliers
 - If Supplier is not listed – STOP – got to Create Supplier Request to start the process of adding a new supplier. (See Create Supplier Screen Shots)

Request Type: Request for Service

Request Non-Catalog Items

[Actions](#)

Requisition Currency *

Non-Catalog Request Type

Request Goods
 Request Service

Service Request Details

Description *

Spend Category *

Supplier *

Supplier Contract (empty)

Start Date

End Date

Extended Amount

Memo

[Add to Cart](#) [Continue Shopping](#) [Cancel](#)

Use Request for Services if purchase order needs to be treated as a blanket purchase order

Request Type: Request for Service

Request Non-Catalog Items

Requisition Currency *

Non-Catalog Request Type

Request Goods
 Request Service

Service Request Details

Description *

Spend Category *

Supplier *

Supplier Contract

Start Date

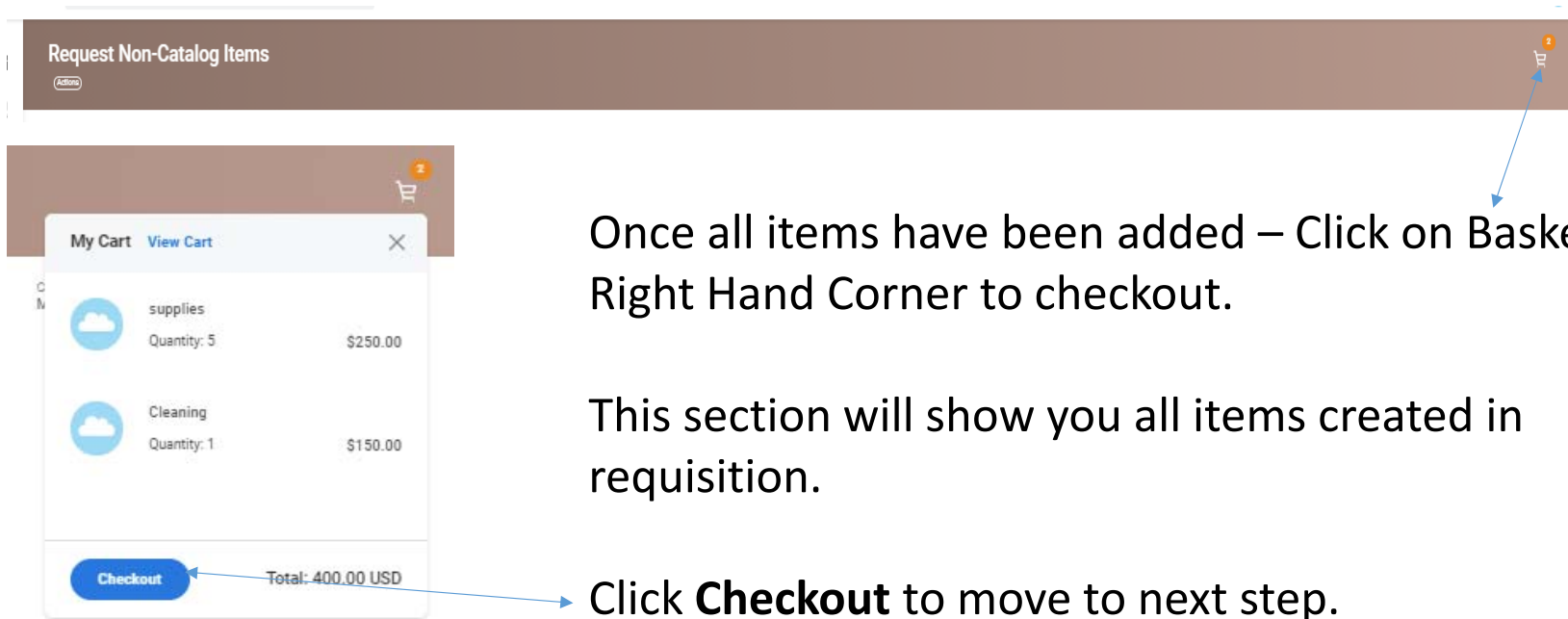
End Date

Extended Amount

Memo

[Add to Cart](#) [Continue Shopping](#) [Cancel](#)

Completing the Requisition



The screenshot shows a 'Request Non-Catalog Items' header bar with a 'Basket' icon in the top right corner. A 'My Cart' popup is open, displaying a list of items: 'supplies' with a quantity of 5 and a price of \$250.00, and 'Cleaning' with a quantity of 1 and a price of \$150.00. The total amount is \$400.00 USD. A blue 'Checkout' button is located at the bottom left of the popup. A blue arrow points from the 'Basket' icon in the header to the 'Checkout' button.

Item	Quantity	Price
supplies	5	\$250.00
Cleaning	1	\$150.00
Total:		400.00 USD

Once all items have been added – Click on **Basket** in Right Hand Corner to checkout.

This section will show you all items created in requisition.

Click **Checkout** to move to next step.

Reviewing the Requisition before Submitting for Approval

Company: Marymount University | Requirer: LaSandra N. Lockett | Requisition: -New- | Status: Draft | Total Amount: 400.00 USD

Shipping Address

Deliver-To: Main Campus
 Ship-To Address: 2807 N. Glebe Rd.,
 Arlington, VA 22207
 United States of America

Requisition Information

Request Date: 03/04/2021
 Currency: USD
 Requisition Type:
 High Priority:
 Sourcing Buyer:
 Submitted by: LaSandra N. Lockett
 Memo to Suppliers:
 Internal Memo:

Note: From this screen additional information can be added or changed before submitting.

Goods

Image	Item	Item Description	*Standard Category	*Quantity	Unit Cost	Extended Amount	Deliver-To	*Ship-To Address	Ship-To Contact	Requested Delivery Date	*Supplier	Supplier Item Identifier	RFQ Required	Memo	*Fund	*Cost Center
	Purchase Item	envelopes	Supplies	5	80.00	400.00	Main Campus	2807 N. Glebe Rd. Arlington, VA 22207 United States of America	LaSandra N. Lockett		Shenwin Williams Co.				10 Operating	4700000 Office

Services

Image	Item	Description	*Standard Category	Extended Amount	Date	Deliver-To	*Ship-To Address	Ship-To Contact	*Supplier	RFQ Required	Memo	*Fund	*Cost Center	Grant	Gift
		Cleaning	Building RSM Interior-Other	180.00	Start Date End Date	Main Campus	2807 N. Glebe Rd. Arlington, VA 22207 United States of America	LaSandra N. Lockett	Sodexo, Inc. & Affiliates			10 Operating	4700000 Business Office		

Attachments

Activity (0)
 Type "@" to tag someone.

Submit Save for Later Continue Shopping

Approval Process: Budget Check

You have submitted

Requisition: RQ-000034, Requester: La'Sandra N. Lockett, Date: 03/04/2021, Amount: \$400.00 [Actions](#)

Up Next

Check Budget (Financial) for Requisition - Batch/Job: Run Budget Check

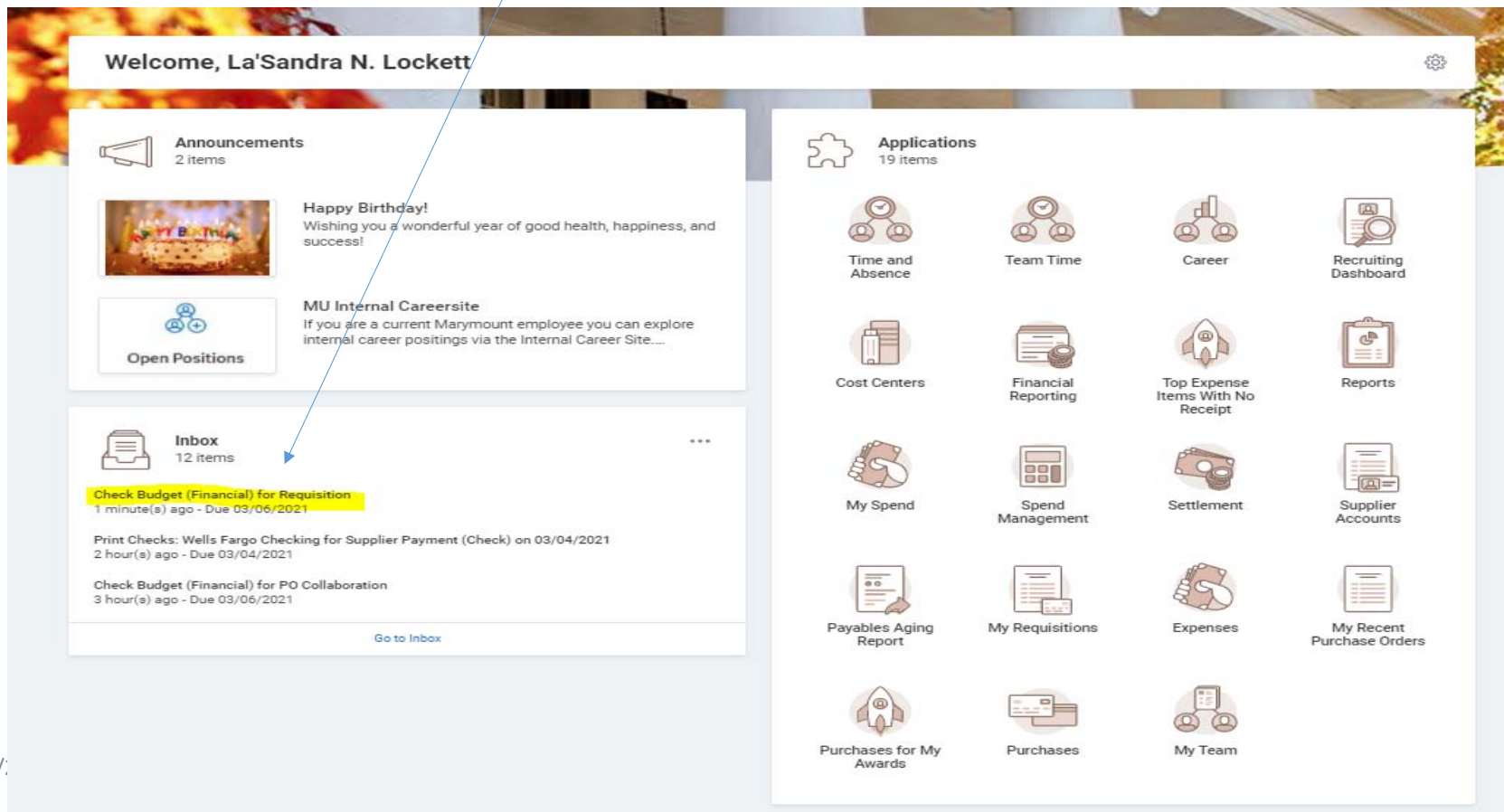
> Details and Process

After the requisition is submitted, the next step is **Budget Check**. This is routed to the Requestor.

- Budget Check will only be required when there is not enough funds on Cost Center.
- If there are not enough Funds please contact Budget Manager to discuss.
- Budget Check will appear in Requestor's inbox.

Done

INBOX of Requestor



The screenshot displays the Workday user interface for La'Sandra N. Lockett. At the top, a welcome banner reads "Welcome, La'Sandra N. Lockett" with a settings gear icon on the right. Below the banner are two main sections: "Announcements" and "Inbox".

Announcements (2 items):

- Happy Birthday!** Wishing you a wonderful year of good health, happiness, and success! (Accompanied by a birthday cake icon)
- MU Internal Careersite** If you are a current Marymount employee you can explore internal career positings via the Internal Career Site... (Accompanied by an "Open Positions" icon)

Inbox (12 items):

- Check Budget (Financial) for Requisition** (Highlighted in yellow) 1 minute(s) ago - Due 03/06/2021
- Print Checks: Wells Fargo Checking for Supplier Payment (Check) on 03/04/2021** 2 hour(s) ago - Due 03/04/2021
- Check Budget (Financial) for PO Collaboration** 3 hour(s) ago - Due 03/06/2021

A blue arrow points from the "INBOX of Requestor" title to the "Check Budget (Financial) for Requisition" item in the inbox. A "Go to Inbox" link is located at the bottom of the inbox section.

Applications (19 items):

- Time and Absence
- Team Time
- Career
- Recruiting Dashboard
- Cost Centers
- Financial Reporting
- Top Expense Items With No Receipt
- Reports
- My Spend
- Spend Management
- Settlement
- Supplier Accounts
- Payables Aging Report
- My Requisitions
- Expenses
- My Recent Purchase Orders
- Purchases for My Awards
- Purchases
- My Team

Approval Process: Budget Check

Review Budget Check

Check Budget (Financial) for Requisition [Actions](#)

3 minute(s) ago - Due 03/06/2021



Budget Check Status
Warn (No Budget)

For Transaction Requisition: RQ-000034, Requester: La'Sandra N. Lockett, Date: 03/04/2021, Amount: \$400.00

Plan With Exceptions Transactions

Plan With Exceptions 1 item

Company	Plan Structure	Year	Control Periods	Budget Check Option	Plan to Date	
Marymount University (---)	Operating Budget	2021	Annual	Warn	<input type="checkbox"/>	View

Review Budget Check – Click on View to see the budget for Cost Center

Contact Budget Manager if you have questions regarding Budget Line for Cost Center

Click Submit to route to Buyer For Review

Approval Process: Budget Check

Check Budget (Financial) for Requisition Actions

5 minute(s) ago - Due 03/06/2021

Up Next

 Grace Villanueva

Requisition: RQ-000034, Requester: La Sandra N. Lockett, Date: 03/04/2021, Amount: \$400.00 - Review Requisition
Due Date 03/06/2021

> [Details and Process](#)

Others Awaiting My Action

[Check Budget \(Financial\) for PO Collaboration](#)
[Check Budget \(Financial\) for PO Collaboration](#)

- After Requestor has reviewed the Budget and click submit.
- The Requisition is then routed to Buyer
- Once Buyer has reviewed and all information and is ok, Buyer will submit approval of Requisition
- Requisition is then routed to Cost Center Manager