Create Requisition

Requisitions are requests to purchase goods and/or services from suppliers.

> ***Workday has delivered improvements to the Requisition process***
>
> ***effective 3/7/20. All changes are marked with this*** ***graphic. The three primary changes are:***
>
> 1. ***More defaults can be set at the "header" or beginning of the order***
> 2. ***Field definitions/help available within the procurement form***
> 3. ***Less "clicks" required to move through the requisition process***

Follow the steps below to create a requisition in Workday.

1. Select the **Purchases** application on your Workday homepage,
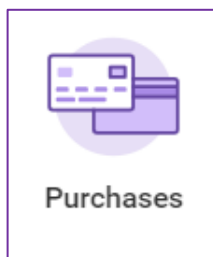
2. Select **Request Non-Catalog Items**, **Connect to Supplier Website** or **Add from Templates/Requisitions** to create your requisition.
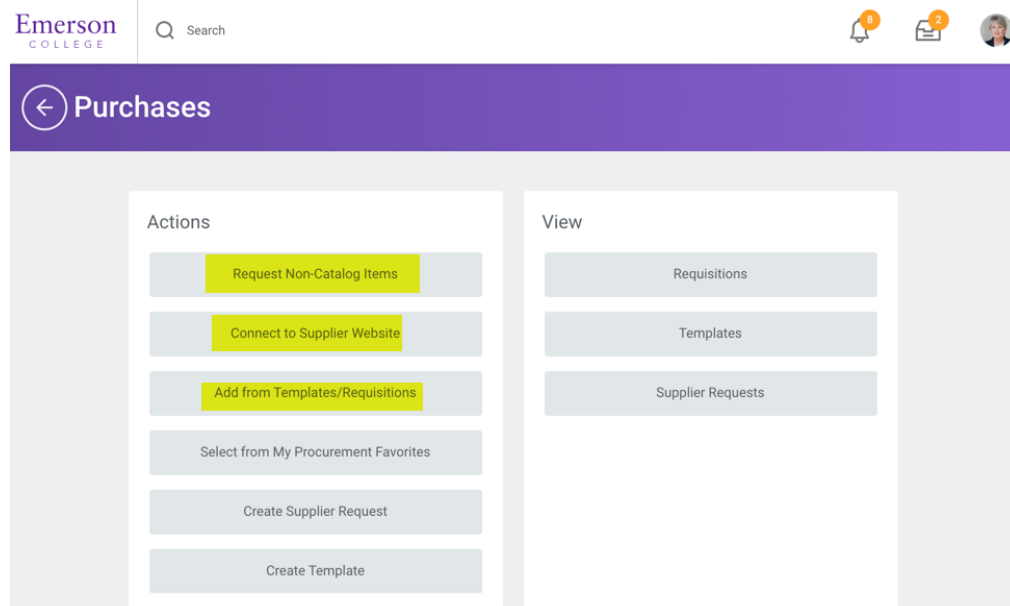
New

3. **Upon selecting an option above, a new HELP feature appears.** You have the ability to take advantage of the ⑦ features that enables field help

New

4. **Review or change the defaults that will carry through to the entire order**. Use the new help feature ⑦ for definitions and additional help.

5. For instructions on how to create a requisition for non-catalog items, supplier punchouts, or leveraging previous orders, skip to the corresponding section below based on your need.
   - **Request Non-Catalog Items** -Typically services/consulting requests
   - **Connect to Supplier Website** – Goods purchases from Emerson's catalog suppliers (currently WB Mason, Adorama, Apple, B&H, Dell, Connection, and Grainger)
   - **Add from Templates and Requisitions**-Typically services/consulting requests

How to Request Non-Catalog Items

1. **Requisition Currency**: USD defaults. Requisitions should always be made in USD.

2. **Non-Catalog Request Type**: Choose **Request Goods** *or* **Request Service**. Your selection will dictate the following steps. (Use Goods when you know the quantity, unit of measure, and pricing per unit – *even if you are purchasing services*. Use Service when you know the total cost but don't know how much each invoice will be for. (A blanket or open PO will be created from Service Requisitions.). A dual signed contract or a fixed price list are required whenever a Service order is created. It is recommended that you do not combine Goods lines and Service lines in one requisition.

   a. **Request Goods**: Fill out the **Goods Request Details** that appear.

      i. **Item Description**: Provide a short description of your request.

      ii. **Supplier Item Identifier**: If known, put the supplier's part number in this field

      iii. **Spend Category**: Select from the available options.

      iv. **Supplier**: Select if known.

      v. **Supplier Contract (Optional)**: In time, Emerson will be loading all contracts into workday. If you selected a vendor with a contract in the system, a drop down will appear – however you may skip this section.

vi. **Quantity**: Indicate the quantity of the good.

vii. **Unit Cost**: Indicate the cost of the good.

viii. **Unit of Measure**: Indicate the unit of measurement of the good.

ix. **Extended Amount**: Will default from the quantity multiplied by the unit cost.

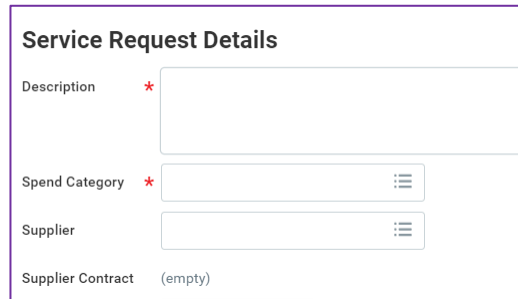x. **Memo**: Enter any additional details about the good. This memo will show up on the resulting Purchase Order.

Quantity	*	0
Unit Cost		0.00
Unit of Measure	*	select one ▼
Extended Amount		0.00
Memo		

xi. Click **Add to Cart** at the bottom of the page. You will receive a pop-up message confirming the good has been added to your cart.

xii. You may continue adding additional **Goods** lines as needed.

xiii. For instructions on how to complete your purchase, skip down to the **Your Cart** section of this guide.

* This is the end of the instructions for requesting a good.

b. **Request Service**: Fill out the **Service Request Details** that appear. (It is recommended that you do not combine **Goods** lines and **Service** lines in one requisition).

i. **Description**: Enter a description of the service you are requesting.

    ii. **Spend Category**: Select from the available options.

   iii. **Supplier**: Select if known.

   iv. **Supplier Contract (Optional)**: In time, Emerson will be loading all contracts into Workday. If you selected a vendor, a contract in the system, a drop down will appear – you may skip this section.
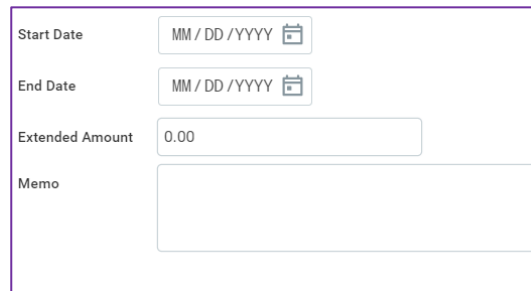
Service Request Details	
Description *	
Spend Category *	
Supplier	
Supplier Contract	(empty)

    v. **Start Date**: Enter the expected start date of the service.

   vi. **End Date**: Enter the expected end date of the service.

  vii. **Extended Amount**: Enter the expected cost of the service.

 viii. **Memo**: Enter any additional details about the service. This memo will show up on the resulting Purchase Order.

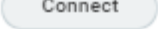|	
Start Date	MM / DD / YYYY
End Date	MM / DD / YYYY
Extended Amount	0.00
Memo	

   ix. Click **Add to Cart** at the bottom of the page. You will receive a pop-up message confirming the service has been added to your cart.

    x. For instructions on how to complete your purchase, skip down to the **Your Cart** section of this guide.

* This is the end of the instructions for requesting a service.

How to Connect to Supplier Website

1. Scroll to your desired supplier and select **Connect** Connect on the right-hand side of the page.

2. Follow the instructions on the supplier website to select your items and create the requisition.

    a. While each vendors' site is unique, all have a final step that you must take to pull the items back into your Workday cart. Some may say **Return to Cart** or **Check Out** and others say **Order**. Clicking this will not place the order. The order can only be placed by a Workday PO once budget availability is confirmed and the Workday requisition has received all required approvals.

3. For instructions on how to complete your purchase, skip down to the **Your Cart** section of this guide.

Add from Templates and Requisitions

1. **Requisition Currency**: USD will default but you may update as needed.

2. **Company**, **Requester** and **Currency** default. The **Requisition Type** should be left blank.

Company	*	✕ Emerson College
Requester	*	
Currency	*	✕ USD
Requisition Type		

3. Select *one* **Requisition Template** *or* **Past Requisition** by checking the box next to your preferred requisition. If you select more than one you will receive a warning to initiate another punchout session.

Requisition Templates 1 item

Select
✓

Past Requisitions 27 items

Select	Requisition
☐	RQ-1000102
☐	RQ-1000090
☐	RQ-1000079
☐	RQ-1000064
☐	RQ-1000065

Please note, attachment will not come across so they will need to be added again.

4. At the bottom of the page, choose from the following**:**

   a. **Add to Cart**: Add the selected item to your cart.

   b. **Continue Shopping**: If you click this without previously selecting "Add to Cart", your selection will be discarded and you will be directed to another type of requisition.

   c. **View Items**: Provides more information about your selection.

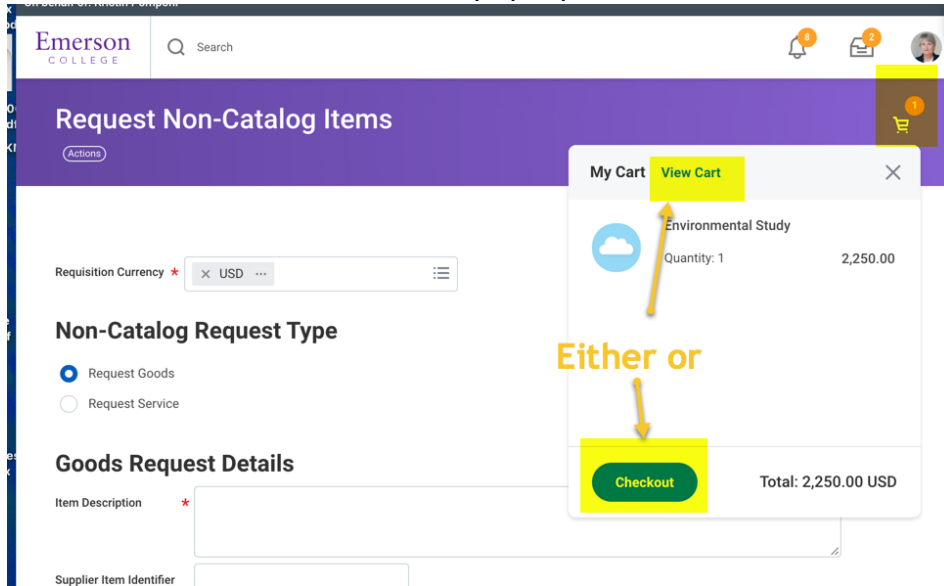   d. **Cancel**: Returns you to the **Purchases** application.
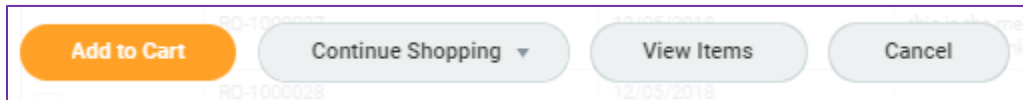
5. For instructions on how to complete your purchase, skip down to the **Your Cart** section of this guide.

Your Cart

New

1. In the upper-right corner of the screen, click the **Cart** icon to access what you have requisitioned. A window will pop up. If all looks good, click **checkout** in the bottom of the pop-up window.

2. If you would like to edit or remove an item, click view cart. To remove an item, click the **Trashcan** icon in the upper-right corner. You can click **Checkout** at the bottom or **Continue Shopping** of the page to continue
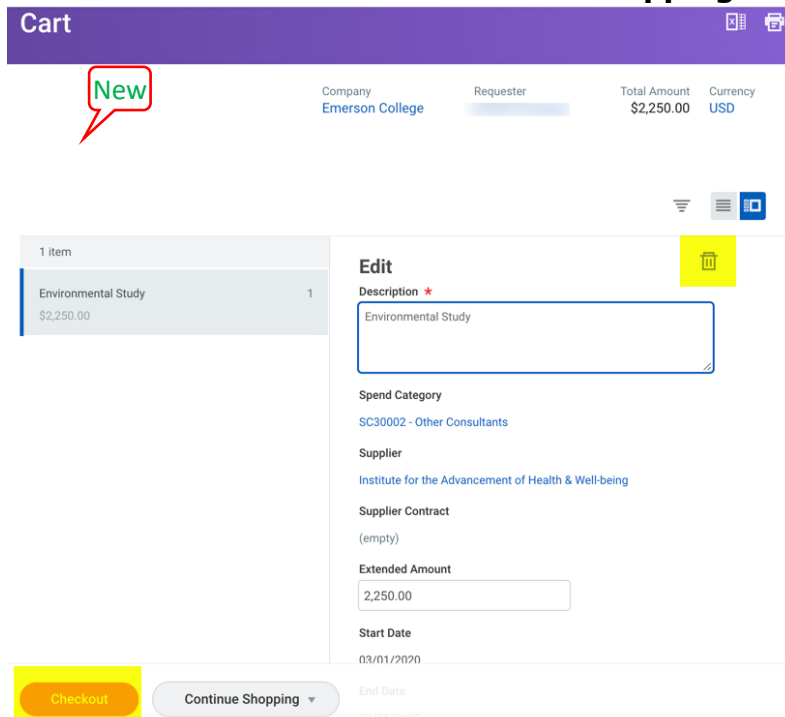
Checkout

NOTE: You may see an error message pop-up if you created a goods or services requisition. Most likely it is just reminding you that an attachment is required. You will have the ability to add attachments (step 4) before proceeding.

1. **A new HELP feature appears.** You have the ability to take advantage of the ⊙ features that enables field help

2. **Shipping Address**: Confirm the **Deliver-To** and **Ship To** addresses. To make any changes click on the ⋯ symbol on the bottom of the page and select "edit address"

3. **Requisition Information, Goods & Services Lines**: Confirm all information is correct. Click on the ⑦ symbol for additional help.

4. **Attachments**:
   a. If the Attachments window is not expanded, click the > to expand it

   › **Attachments**

   b. Click **Select Files** and add attachments for this requisition, as needed. All non-catalog (supplier) orders require an attachment. Attachments should contain a price quote or a contract from the supplier.

   ⊙ **Attachments**

   Drop files here

   or

   Select files
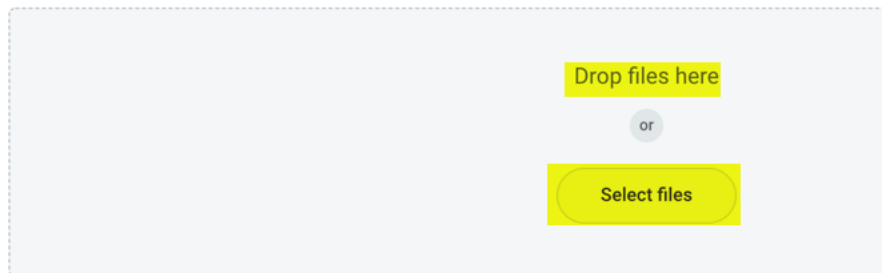
5. When you are ready, click **Submit**. You may also click **Save for Later** and return to this requisition at a later time.

6. Click "Done"

What happens next?

*If a requisition is routed to you for approval, please use the **Approve Requisitions** job aid for more information.*

After submitting, there are two ways to know what happens next:

1. At the top of the page there is an Up Next section. You will see who or what is next in the approval process.

2. You may expand the Detail and Process section and click the Process tab. At the bottom of that section, click the icon: Remaining Process

- The budget will be checked to verify there are funds for the requisition to process.
- The requisition will route to the Cost Center Manager for approvals if:
    - Your requisition is for outside of your home cost center.
    - Your requisition is greater than or equal to $5,000.
    - Your requisition is for multiple cost centers.
- If part of a project or grant, the requisition will route to the Project Manager or Grant Manager, respectively, for approval.
- Requisitions greater than or equal to $25,000 will route to Executive Approvers. Further approvals will be required the higher the amount of the requisition.