PUNCH-OUT REQUISITION ORDERING IN WORKDAY

Select suppliers have punchout ordering enabled in Workday. This feature allows users to punchout and shop on supplier websites, while completing their checkout and approval process in Workday via requisition.

WB Mason office supply orders are the most common type of punchout requisition.

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Purchasing Department
purchasing@simmons.edu

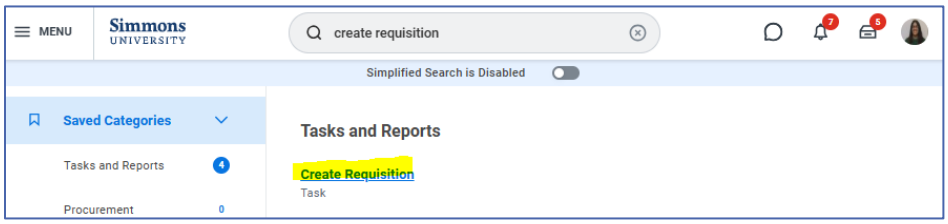
rev. April 2025

Punch-Out Requisitions

1. Login to workday.simmons.edu

2. In the Search Bar, type “Create Requisition” Note: any abbreviation will also bring up the create requisition option eg: cre req, req etc

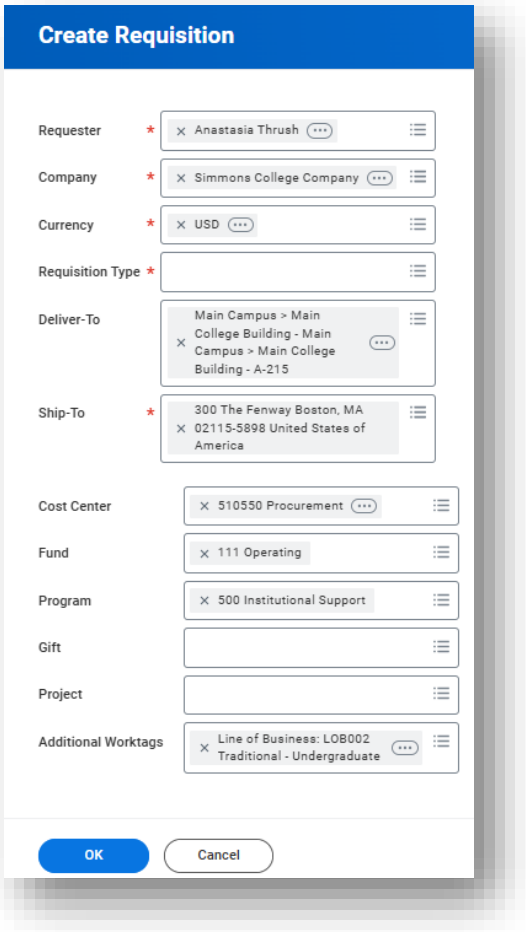
3. From the search results list, click the “Create Requisition” task.

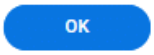


4. On the following screen, many of the fields will have auto-filled and should not be changed, but please review and update the following fields:

   - Update the “Requisition Type” field to “Standard Purchase Order”

   - Review the cost center as it will autofill based on your Payroll cost center. On this screen, you may update the cost center or Gift/Project/Additional Worktag numbers as needed, however, this can also be changed later in the requisition creation process.



5. Click 

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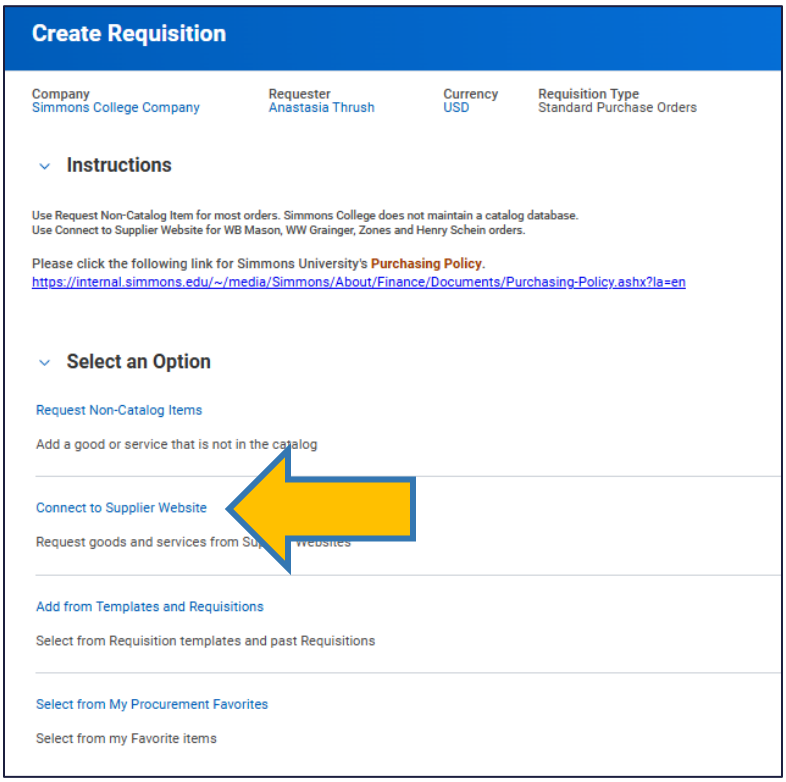
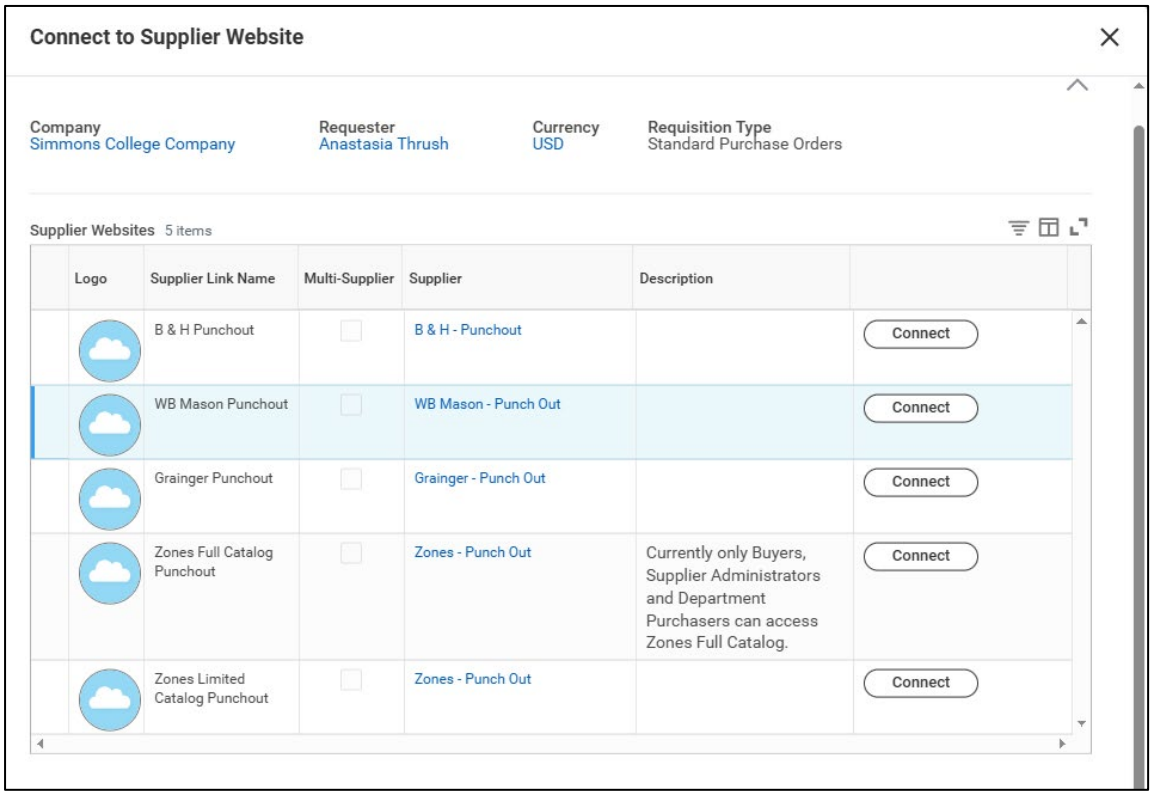
6. From the Select Options section on the next screen, click “Connect to Supplier Website”



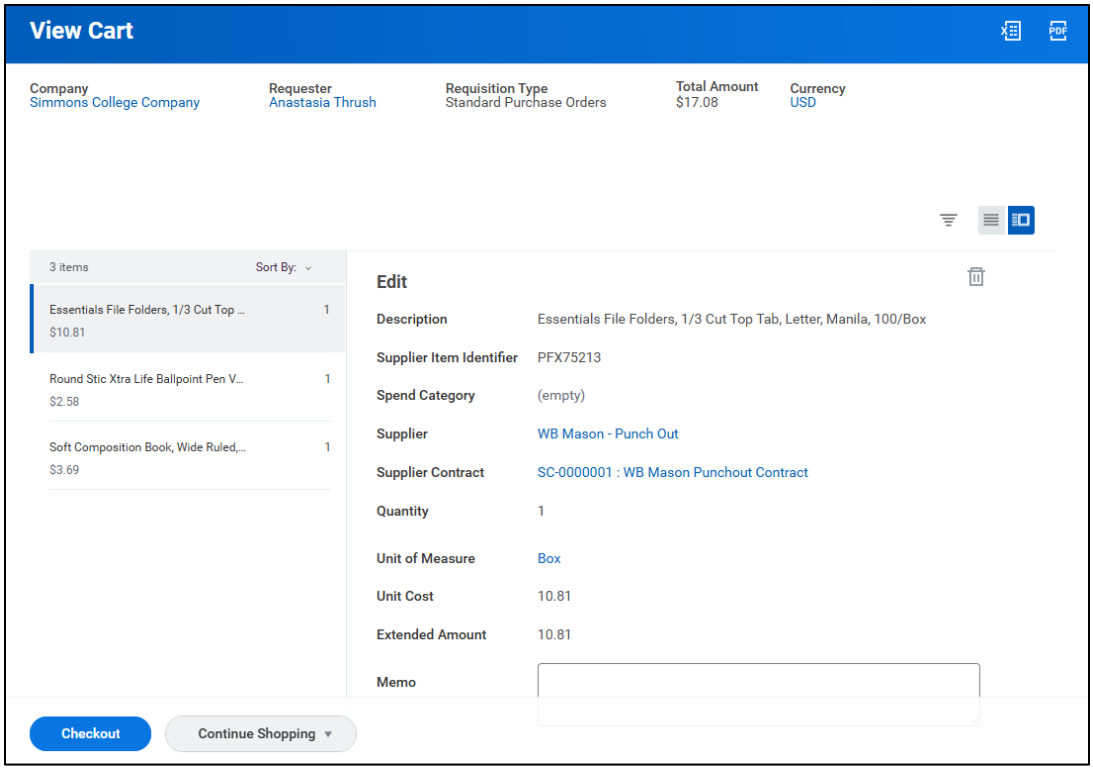
7. Review the supplier website options and click “Connect” on the relevant supplier line.



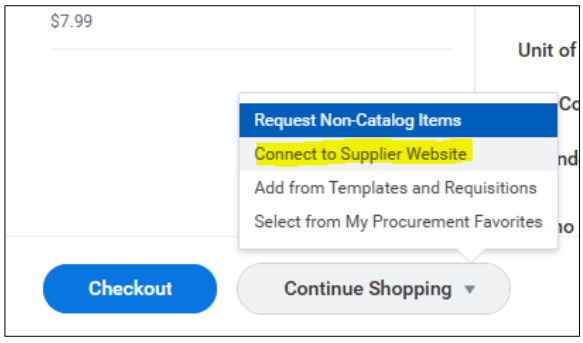
8. Clicking Connect will open the supplier website. Shop as usual, searching for the items you need and adding as many items as desired to your shopping cart.

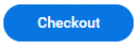
9. Once all items have been added to your shopping cart, continue to the checkout process. Your screen will bring you back into Workday.

10. The View Cart Workday screen will list all items current requested for purchase:

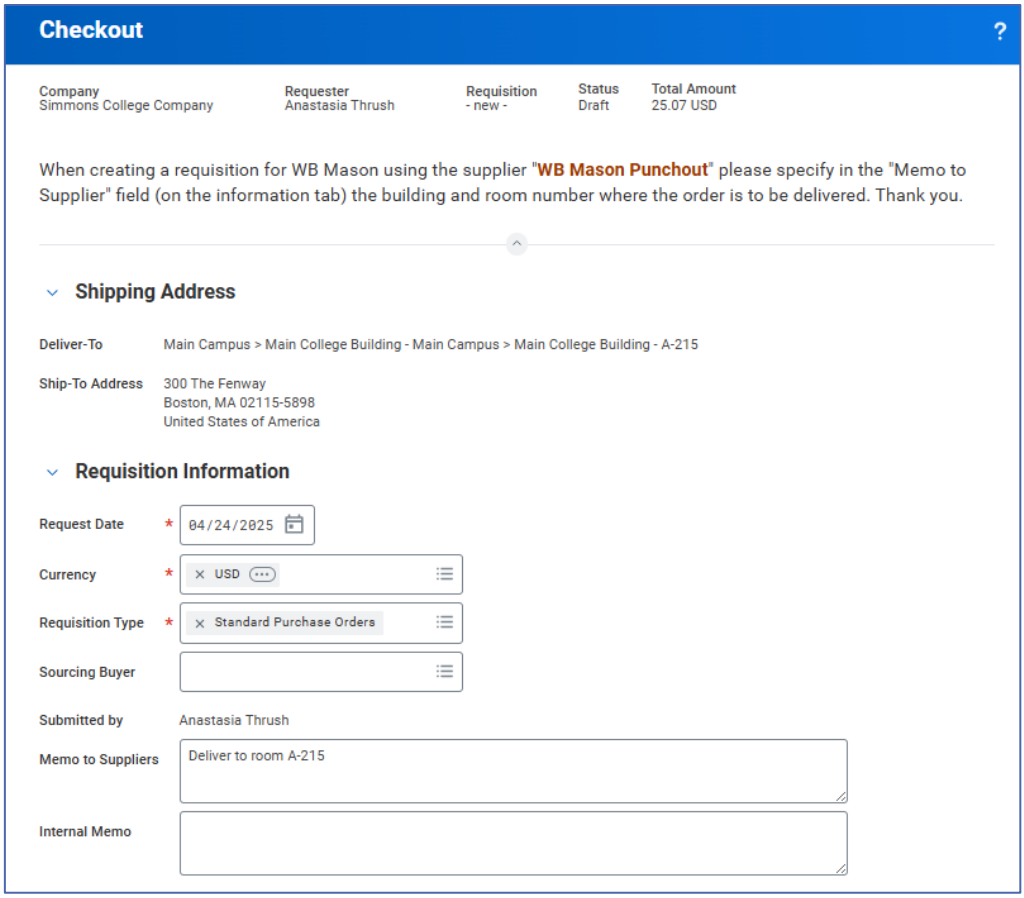


At this point, if you see you forgot to add an item to your order, you can return to the supplier site by clicking "Continue Shopping" then select "Connect to Supplier Website". This will return you to step 7 and start a new shopping cart but will not delete items already pulled into Workday for this order.



11. If all needed items are listed, then click  on the bottom left.

12. The Checkout screen is the final screen before submitting the requisition into the approval process.



Many fields will auto-fill or be blank and should not be changed, but please review and update the following fields:

Shipping Address – Defaults and in most cases will not be changed.

Request Date – Defaults as current date, do not change

Requisition Type – Standard Purchase Orders

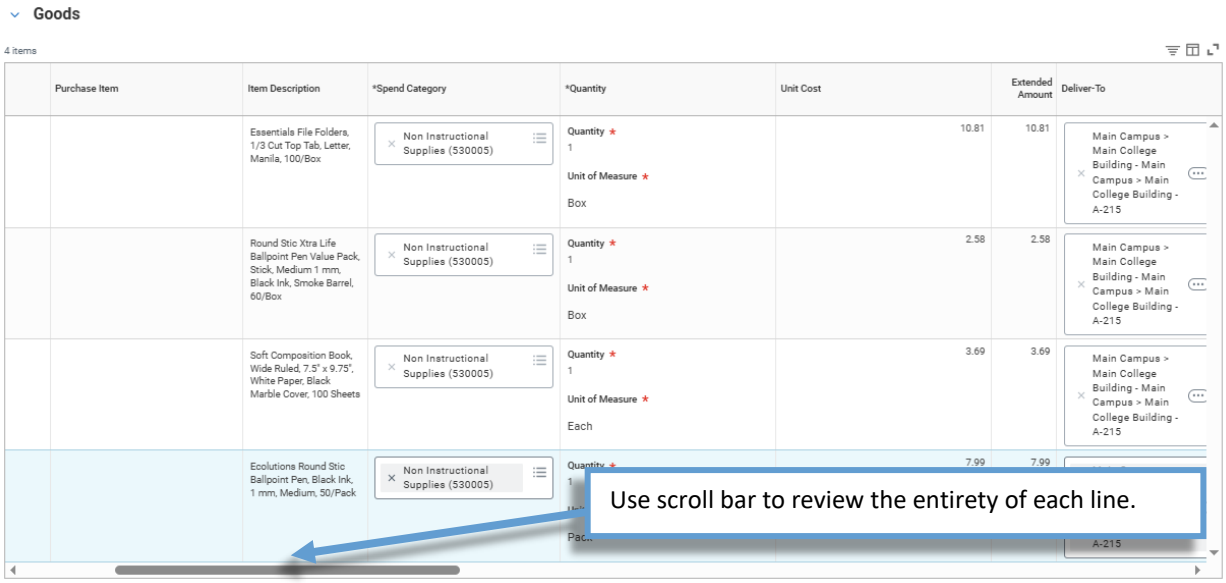
Sourcing Buyer – Leave Blank

Memo to Suppliers: This is memo for the supplier which prints on the purchase order. Include anything additional the supplier should know. **NOTE:** *FOR WBMASON ORDERS, YOU MUST SPECIFY THE BUILDING & ROOM NUMBER TO WHICH THE SUPPLIES SHOULD BE DELIVERED. Failure to include this information could cancel your order.*

Internal Memo: This memo is internal and does not print on the PO. Include any additional information desired for your approvers and/or the Purchasing department.

TIP: At any point during the Checkout portion of the process, you can select "Save for Later" at the bottom of the screen to save your process and continue the requisition at a later time. To return to your requisition, to "My Requisitions" from the Workday home screen, and the requisition will appear as a Draft to open and edit.

Most importantly on this page, under Goods, you will need to review and adjust the coding for each line of the requisition for accuracy and completion.



For each line, review and verify the fields are entered but specifically review and edit as needed the following fields:

Spend Category – Enter the correct spend category for each line. For most WB Mason purchases, the spend category will be "Non-Instructional Supplies (530005)

Supplier – DO NOT CHANGE THIS FIELD. The correct name of the supplier will already be complete.

Cost Center – The cost center will auto fill with your department number or the number you entered when beginning the requisition. Edit now if needed.

Fund – DO NOT CHANGE THIS FIELD – This will autofill based on the cost center, project, or worktag entered.

Program – DO NOT CHANGE THIS FIELD – This will autofill based on the cost center, project, or worktag entered.

Gift – If directed, enter the gift number for each line. The Cost Center, Fund, and Program will auto-adjust when a gift number is entered. Do not change these fields once the gift is updated.

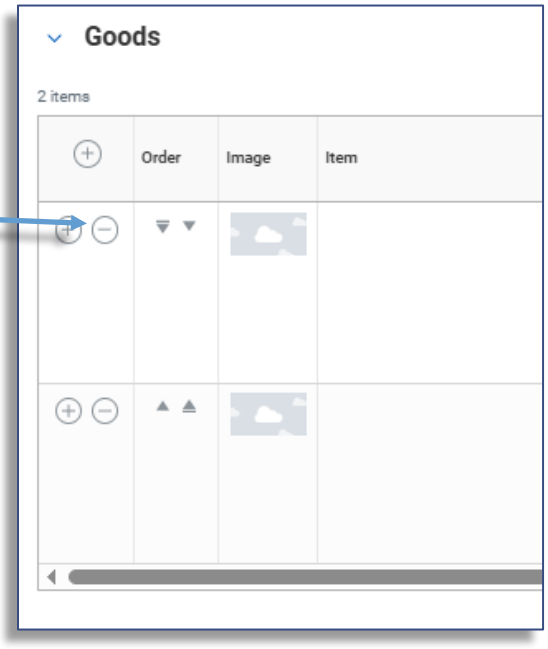
Project – If directed, enter the project number for each line. The Cost Center, Fund, and Program will auto-adjust when a gift number is entered. Do not change these fields once the project is updated.

Additional Worktags - If directed, add an additional worktag. The Cost Center, Fund, and Program will auto-adjust when a number is entered. Do not change these fields once this is updated.

*Fields not listed are not used and should be left blank or as is.

NOTE: You can remove requisition lines at this time, if needed.

- You can also delete any line entered here by clicking the "-"



13. Once all the coding is entered and verified then click Submit on the bottom left. This begins the Business Process. The requisition is now in approval queues.

Finding and Monitoring my Requisition

After clicking submit, your requisition will immediately go through a budget check and then on to the approval process. You can find and follow your requisition through the process by following these steps:

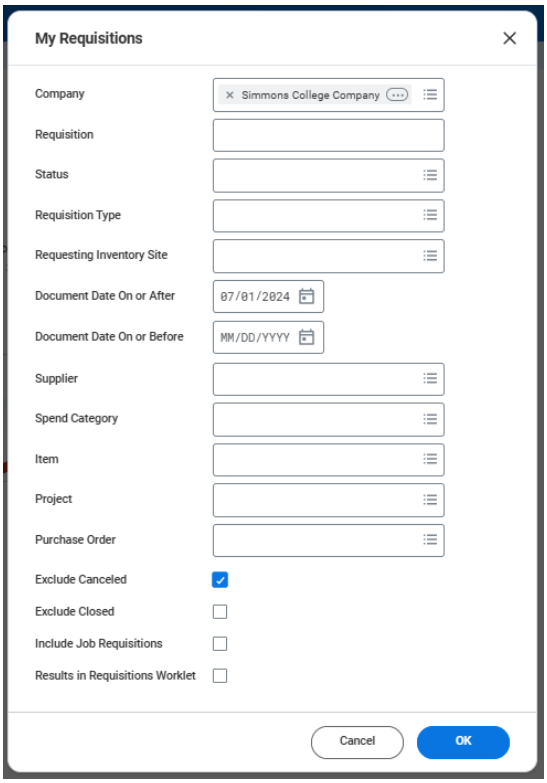
1. In Workday, search and select the report “My Requisitions”

2. In the pop-up window:
   - Adjust the *Document Date On or After* to narrow or widen your search. The Document Date is the date you entered the requisition. Enter July 1st to bring up all requisitions you have entered for the current fiscal year.

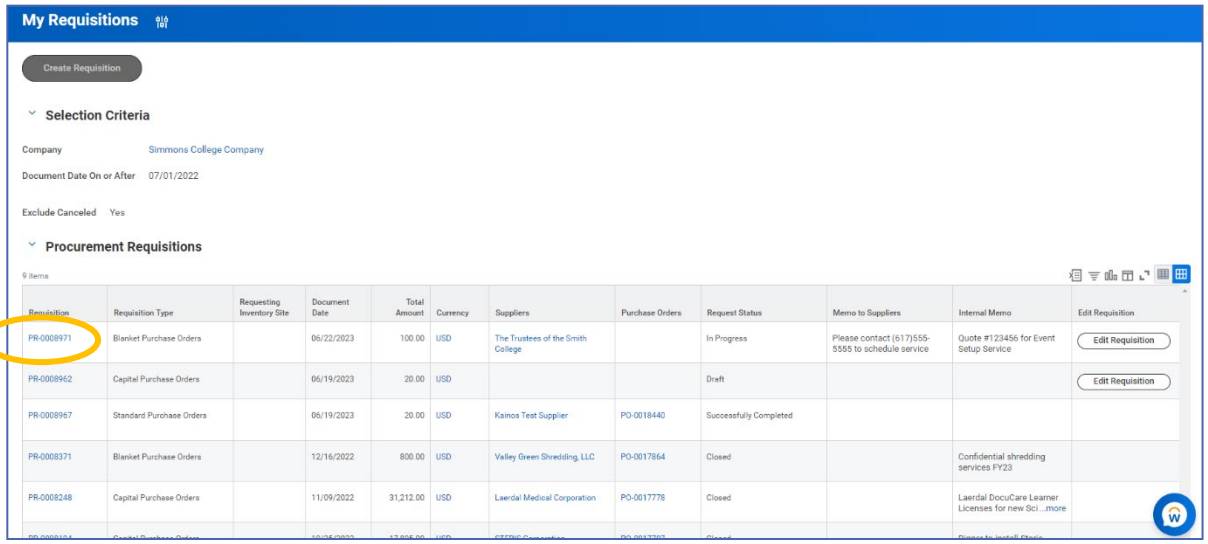
   - Uncheck the “Exclude Closed” box to also see requisitions that have already been approved and closed.

     Note: A closed status on a requisition does not mean the service has been completed, rather it means the requisition has been successfully converted into a Purchase Order and now that the requisition itself is no longer needed it has been closed by Purchasing.

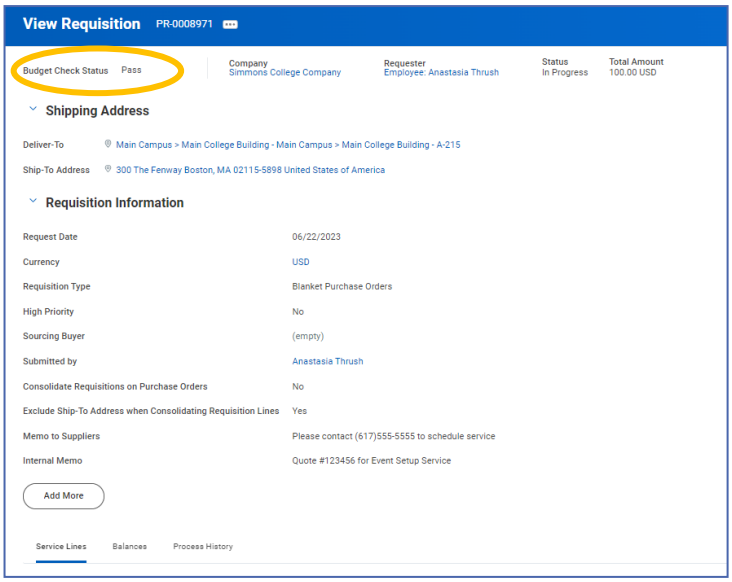
   Click OK



3. Your requisitions will appear here. The most recent requisition will be the first listed.



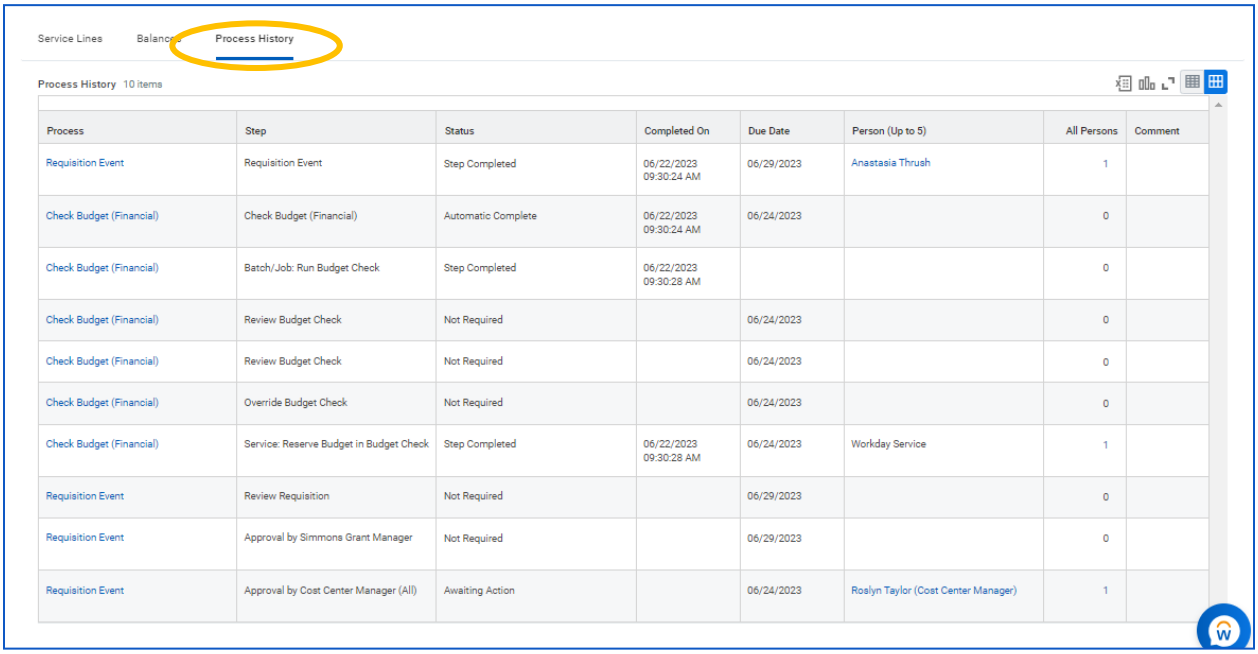
4. Click the blue PR number to open the Requisition. The Budget Check Status will be visible at the top right.



If the budget check has a *warning*, budget is available but not necessarily in the spend category you selected. The requisition will be in your Workday inbox, click submit on the requisition from your inbox and it will move on to approvals.

If the budget check has *failed*, please contact your budget manager to make the needed budget transfers. When the transfers are complete, you can resubmit the requisition.
If the budget check has *passed*, your requisition is now going through approvals. You can see where the report is in the approval process by reviewing Process History.

5. Click Process History to scroll through the history of your report's movement through approvals. Here you will see where the report is currently pending for approval, as well as any comments left by your approvers.



Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Requisition Event	Requisition Event	Step Completed	06/22/2023 09:30:24 AM	06/29/2023	Anastasia Thrush	1	
Check Budget (Financial)	Check Budget (Financial)	Automatic Complete	06/22/2023 09:30:24 AM	06/24/2023		0	
Check Budget (Financial)	Batch/Job: Run Budget Check	Step Completed	06/22/2023 09:30:28 AM			0	
Check Budget (Financial)	Review Budget Check	Not Required		06/24/2023		0	
Check Budget (Financial)	Review Budget Check	Not Required		06/24/2023		0	
Check Budget (Financial)	Override Budget Check	Not Required		06/24/2023		0	
Check Budget (Financial)	Service: Reserve Budget in Budget Check	Step Completed	06/22/2023 09:30:28 AM	06/24/2023	Workday Service	1	
Requisition Event	Review Requisition	Not Required		06/29/2023		0	
Requisition Event	Approval by Simmons Grant Manager	Not Required		06/29/2023		0	
Requisition Event	Approval by Cost Center Manager (All)	Awaiting Action		06/24/2023	Roslyn Taylor (Cost Center Manager)	1	

Next Steps

Once your punchout requisition completes the approval process, the purchase order will *automatically* be sent to the supplier by Workday to place the order.

This differs from regular requisitions which require the Purchasing department to issue and send the PO to the supplier.

For WB Mason orders:

Most orders are delivered as soon as next day if the requisition completes the approval process prior to 11am. WB Mason orders are fulfilled via desktop delivery, brought right to the office noted in the Memo to Supplier field on your PO.

After your order is submitted and fulfilled, no additional action is needed on your part.

WB Mason orders are direct billed to the University. No invoice will need to be processed for payment to be issued.

For all other punchout orders:

Once your order is fulfilled, you will receive an invoice from the supplier. Please enter the invoice against the PO for payment to be issued.

Additional information and guides for this process can be found on the Accounts Payable webpage.

Contact ap@simmons.edu for further assistance, if needed.