HOW TO ENTER A REQUISITION IN WORKDAY

A requisition is a request for purchase order. Once a requisition is approved, a purchase order is issued to reserve funds for a purchase and place an order with a supplier.

Sections:

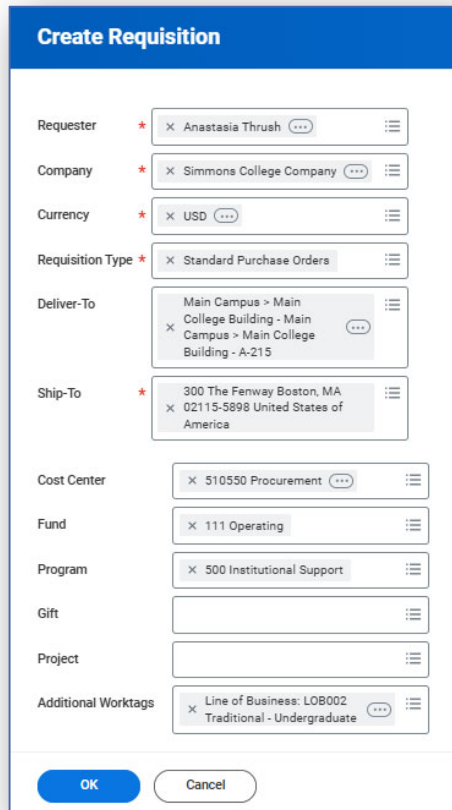
Purchasing Department
purchasing@simmons.edu

rev. August 2025

How to Enter a Requisition in Workday

Please Note: Prior to creating a requisition, contracts will require a contract routing form be completed through AdobeSign indicating the contract has been reviewed and pre-approved by General Counsel and all other required parties. Contact purchasing@simmons.edu with any questions.

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 ex: create req
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; however, you should review and update:



   A) Requisition Type:
   Select from the dropdown list as appropriate:
   - A *blanket* purchase order should be used when there will be multiple/repetitive purchases against this order throughout the year
   - A *capital* purchase order should be used for capital projects only. Capital POs will require a project #.
   - A *standard* purchase order indicates a request for a one-time purchase of goods or services
   - A *multi year* purchase order indicates a service that will be provided over multiple fiscal years. *See page 12 for more information.*

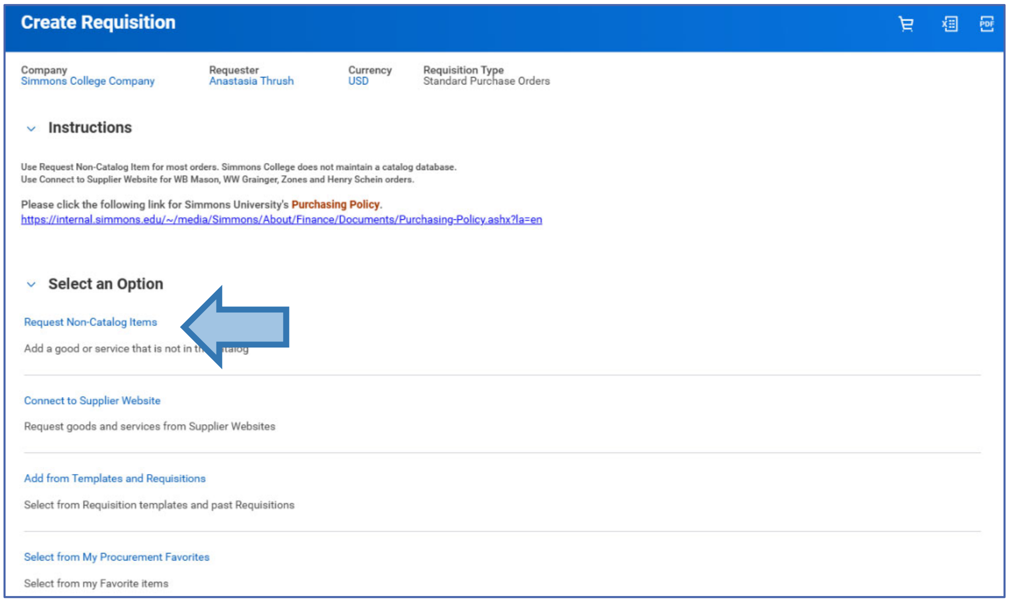
   B) Cost Center, Gift, Project OR Grant Codes:
   This information will default based on your Payroll cost center, so please update as appropriate for your purchase. This information can also be changed and refined later in the requisition creation process.*

**NOTE: When updating coding, only change the cost center, gift, grant, OR project number. The remaining fields will auto populate as appropriate.*

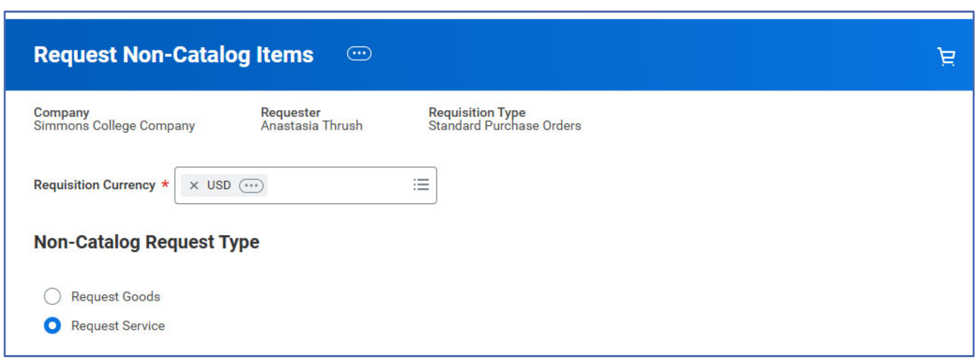
Grant numbers should be added in the Additional Worktags field

5. Click 

6. From the “Select an Option” section on the next screen, click “Request Non-Catalog Items”.



7. At the top of the next screen, you will be asked to select a Non-Catalog Request Type. Select “Request Service” and fill in the Service Request Details fields as instructed on page 3:



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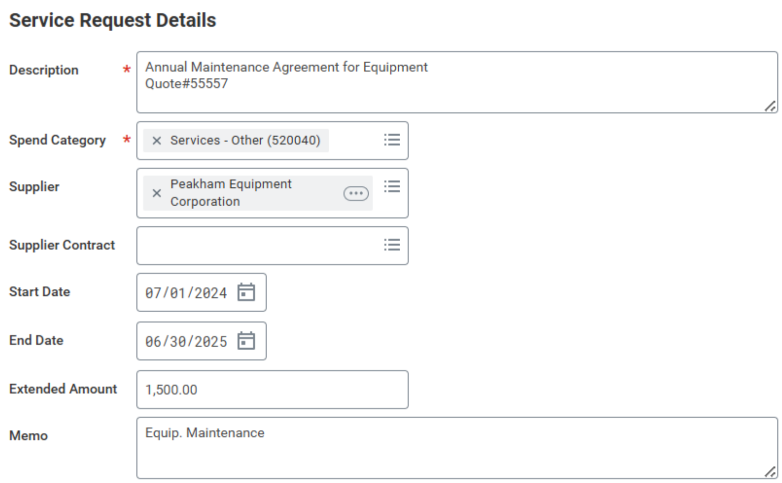
Service Request Details



Item Description (*Required*): Enter a description of what is being purchased. *<u>This information will print on the purchase order to be sent to the supplier</u>*, so include information the supplier will recognize, such as part numbers, proposal and quote numbers, service dates etc.

Spend Category (*Required*): Enter the spend category. You can enter the number, the name of the category, or use the dropdown lists provided to select the appropriate category.**

***For Multi Year purchase orders, see page 12 for more information on selecting the correct spend categories*

Supplier (*Required*): *<u>This information will print on the PO</u>*. Enter the supplier name here. (Contact Purchasing if you cannot find the supplier needed.)

Supplier Contract: This field is not used.

Start Date/End Date (*Recommended*): *<u>This information will print on the PO</u>* - If this particular service will begin and end on specific dates. Enter the specific start and end dates here. This does not create any limitations as to when service can be provided or when invoices can be processed but it is an important identifier for reporting purposes.

Extended Amount (Required): *<u>This information will print on the PO.</u>* Enter the cost here.

Memo (*Required*): This is an internal memo that does not print on the PO – include a very brief note of what is being purchased (Ex: “XYZ Event Setup Fee” or “New Student Orientation Supplies” etc.). This is an important identifier for reporting purposes.**

***For Multi Year purchase orders, see page 12 for more information on entering the correct memo*

8. Click "Add to Cart" to add the entered information as _one line_ of the purchase order. You will receive a pop-up notice that the item was successfully added to the cart.

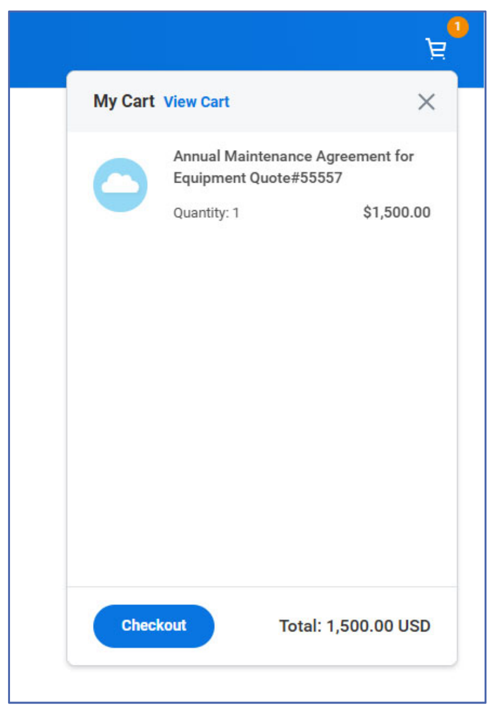
   The page will now be blank for you to add another line item to the requisition, if needed. Continue filling out the form and clicking "Add to Cart" until all desired lines have been added to the requisition for this order. ***NOTE****: Be sure to reselect "Request Service" when starting entering each line.*

   Click the shopping cart icon  on the top right at any time for a brief review of the line items currently your cart.

How many purchase lines are needed for my order?

The number of line items required on a requisition can vary by order. One line of purchase information can be sufficient for many purchases. For example, if a quote is provided for a service, the description on the single line can include a description of overall services and a quote number easily identifiable for the supplier. However, if you are purchasing 2 or more different types of items or if a purchase needs to be divided across fiscal years, entering multiple lines may be more clear and efficient (ex: one line per item type or one line per fiscal year expense). If unsure, please contact the Purchasing Department with questions.

9. Once all the desired lines have been added, click the shopping cart icon then select "Checkout".



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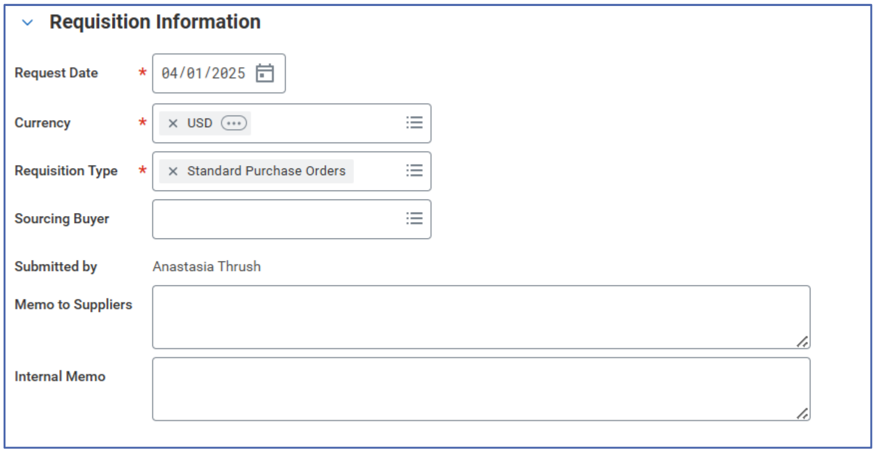
10. The Checkout screen is the final screen before submitting the requisition into the approval process and is separated into five dropdown sections – update as instructed below:

   a. ***Shipping Address*** – Defaults to 300 The Fenway – do not change.

   b. ***Requisition Information***



Request Date: Auto fills to today's date – do not change.

Currency: Auto populates – do not change.

Requisition Type: This will auto fill based on your selection at the beginning of the process. You can update the type here, if needed.

Sourcing Buyer: Leave blank.

Memo to Suppliers: *This memo prints on the purchase order* – include information you need the supplier to know such as special requests (ie: ship complete or no substitutions) or who to contact should they have questions about the order.

Internal Memo: This memo relates to the entire order and should be used to give any additional information to approvers and/or the Purchasing department. Ex: "Please send PO to supplier" or "PO does not need to be sent to supplier"

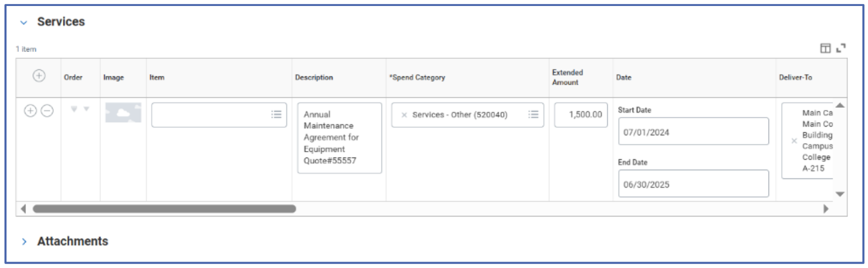
NOTE: Suppliers that have an email address on file will receive POs via email and you as the requester will be cc'd. If you do NOT want the PO sent out or want the PO sent to a specific email address, please indicate this in the internal memo field.

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 progress and continue the requisition at a later time. To return to your requisition, go to "My Requisitions" from the Workday home screen, and the requisition will appear as a Draft to open and edit.

   c. ***Goods*** **–** Skip this section

d. ***Services***

Click > the in front of Services, then use the scroll bars to review all fields.



For each line, review the information already entered and update the following fields as needed:

Item: Do not use this field. Leave blank.

Description: Review line item description.

Spend Category: Verify the correct spend category is entered for each line. You can enter the number, the name of the category, or use the dropdown lists provided to select the appropriate category. (*For Multi Year purchase orders, see page 12 to confirm correct spend categories)*

Extended Amount: Verify the correct amount for each line is entered.

Date: If the order has specific service dates, verify they are correct here for each line.

Deliver-to and Ship-to Address Fields: Default – do not change

Ship-to Contact: Default to Requestor – do not change

Supplier: The name of the supplier of the order should be entered in this field for each line of the requisition

Supplier Contract: Do not use this field. Leave blank.

Memo: Review or add brief description of line – for reporting purposes only. Does not print on PO. (*For Multi Year purchase orders, see page 12 to confirm correct memo)*

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.

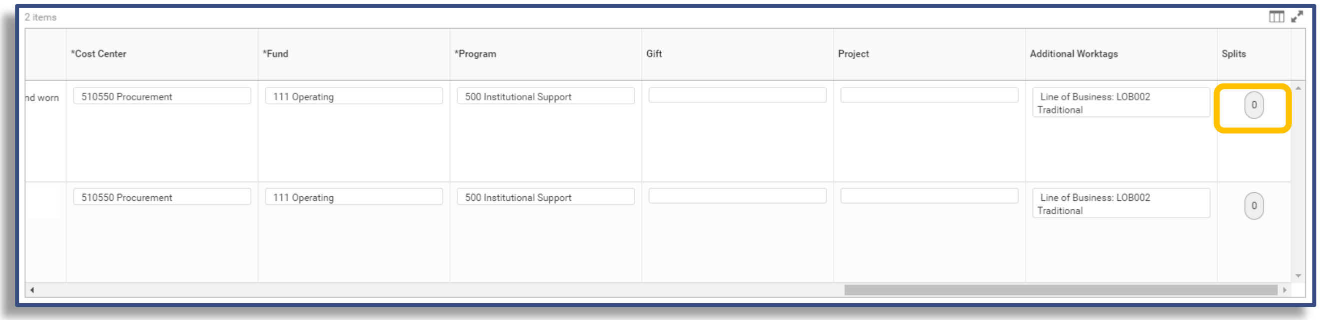
Gift: If applicable, enter the gift number for each line. The Cost Center, Fund, and Program will auto-adjust when a gift number is entered. Do not change these fields once the gift is updated.

Project – If applicable, 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.

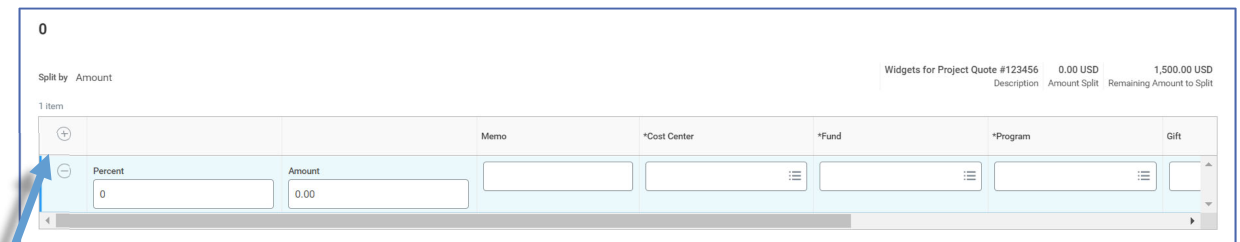
Additional Worktags - If applicable, add an additional worktag. The Cost Center, Fund, and Program will auto-adjust when a number is entered. Do not change these fields once this is updated.

Splits – Usually not applicable - See page 7 for a description of line splits and how to use them

Splits – *Coding one line to multiple cost centers/spend categories*

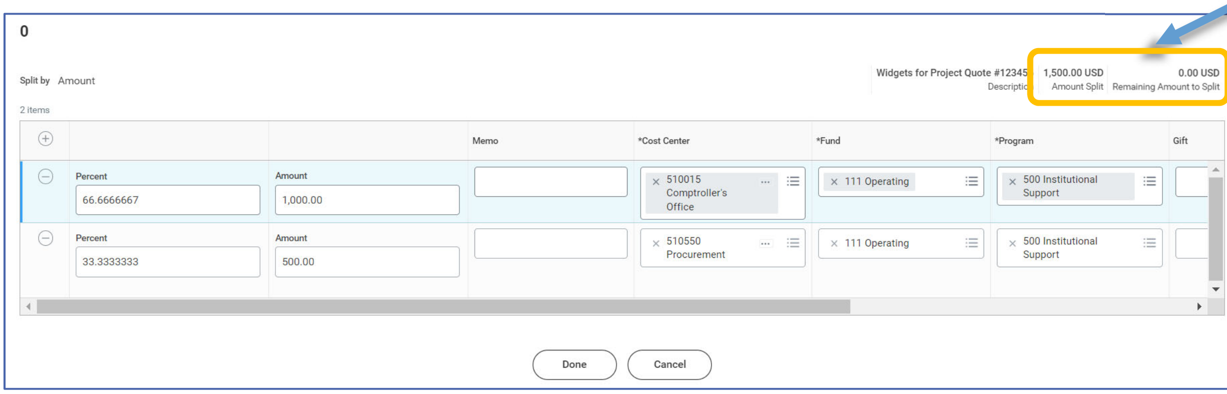


If one line of your requisition will be funded through multiple cost centers or spend categories, you can split the funding for a single line as needed by clicking (0) under the heading Splits on the related line. Distribute budget as needed in the pop up window. You can split by percentage (ex: 50% to one CC and 50% to another) or by amount (ex: $1500 to one CC and $2500 to another for a total $4000 purchase).



Click the + or – on the far left to add or remove budget lines as needed.

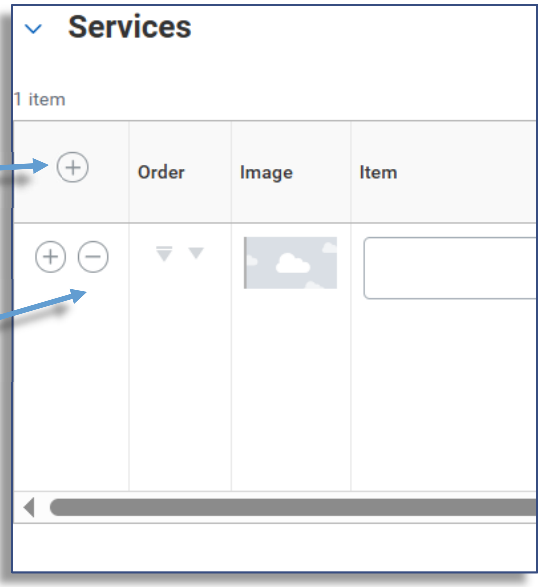
At the top right, you can see how much of the total funds you have allocated and how much still remains to be spilt. In this example, all funds have been allocated and $0.00 remains to be split on this line.



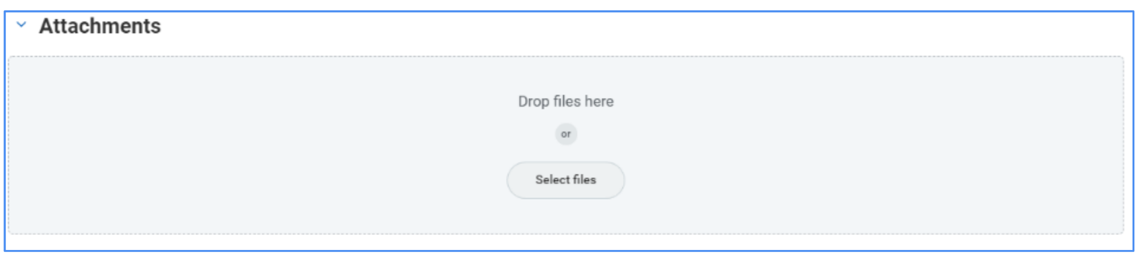
NOTE: You can also add and remove requisition lines at this time, if needed.

- You can add lines to the requisition by clicking the "+" and filling in all the fields as directed on previous pages.

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



e. ***Attachments***



Upload any documentation you have for your purchase.

Possible attachments include: quotes, proposals, rate sheets, contracts, purchase justification forms, contract routing forms, etc.

Drag and drop files to attach or use the "Select Files" button to browse your computer for attachments.

11. Once all the coding has been entered and information has been verified, click "Submit".

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:

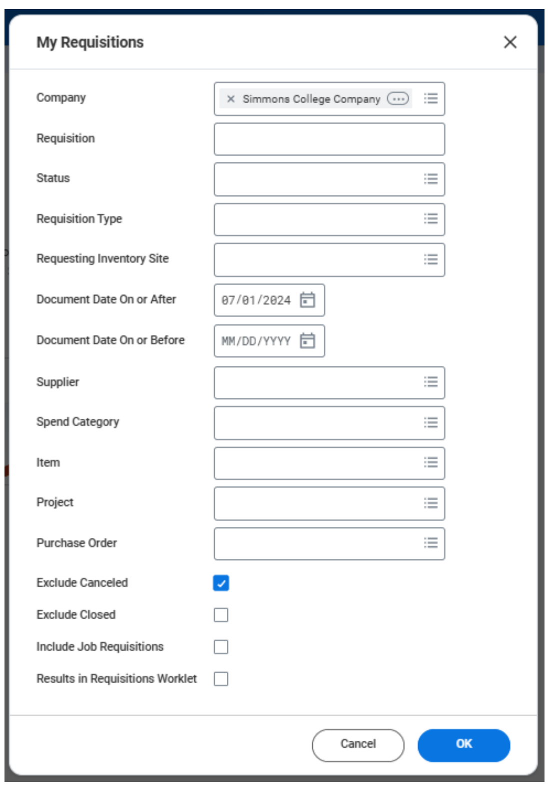
1. In Workday, search and select the report "My Requisitions"

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.

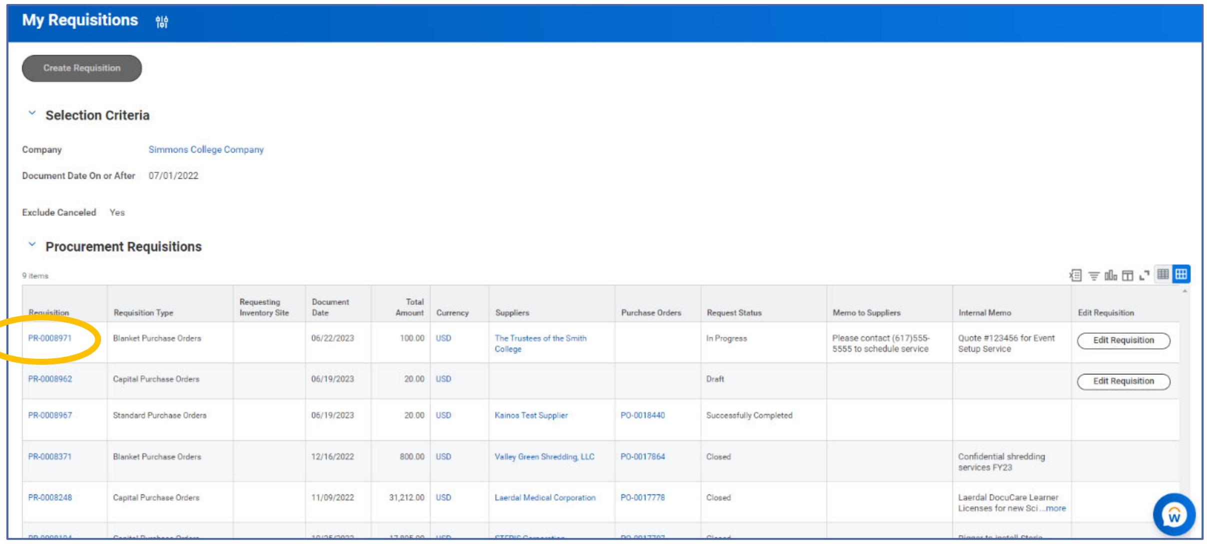
   - Uncheck the "Exclude Closed" box to also see requisitions that have already been approved and closed.

     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.

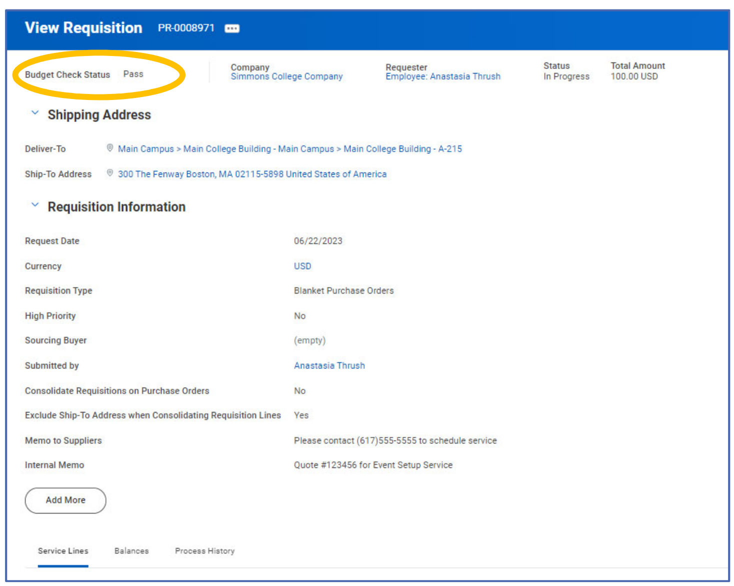
   Click OK



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.

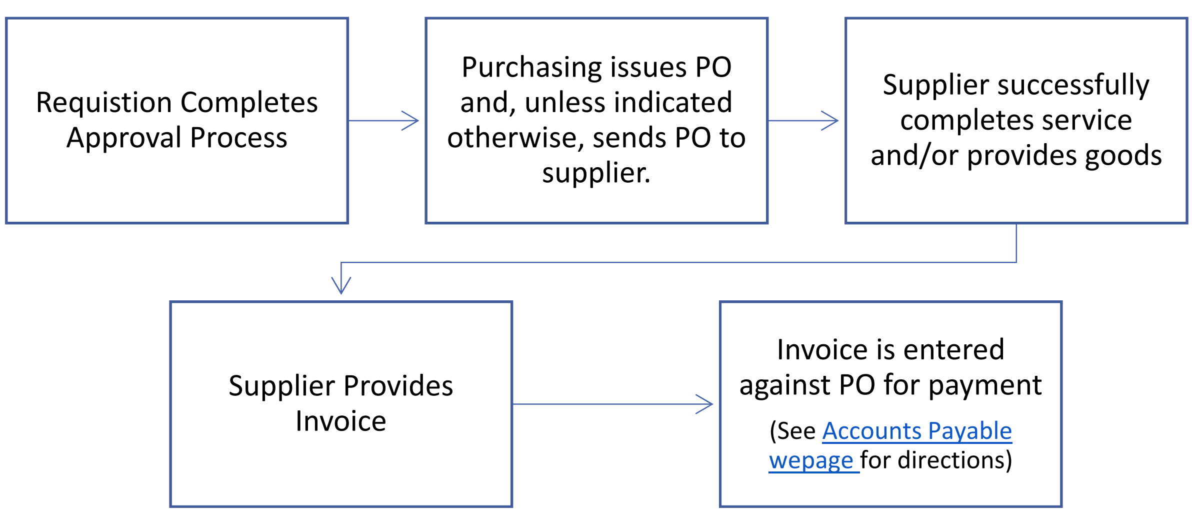
5. Click Process History to scroll through the history of your report's movement through approvals. Here you will see where the report is currently pending for approval, as well as any comments left by your approvers.

Service Lines Balances Process History

Process History 10 items

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



Multi Year Purchase Orders

Multi year purchase orders refer to purchases or agreements whose services extend over multiple fiscal years.

Unlike other POs that are closed at the end of each fiscal year, multi year purchase orders are rolled over by the Purchasing Department into the new fiscal year. This eliminates the need to recreate a new PO for the approved service in the new year and makes things easier to track for both Simmons and our suppliers, as PO numbers for multi year agreements will not change year over year.

A purchase order must be labeled as a multi year and split into separate fiscal year allocations IF:

A) The future fiscal year portion of the expense is equal to or greater than $2,000.*

OR

B) Over the lifetime of the agreement, there will be multiple invoices needing to be processed in different fiscal years.

**Note: If the future fiscal year allocation of your multi year agreement is less than $2,000, you may still enter it as a multi year purchase order, but it is not required.*

When entering a multi year purchase order:

1) Select the "Multi Year Purchase Order" requisition type. This is how the Purchasing department will identify what needs to roll over.

2) Create a separate line on your requisition for each fiscal year and specify the dates of service on each line.

3) When selecting the spend categories for your requisition, use the appropriate related spend category for the current year's amount (ex: "Services – Other" or "Software License" etc.) For the other lines related to future fiscal years, select the allocation spend category related to the appropriate future year (ex: "FY27 Allocation, FY28 Allocation, FY29 Allocation, etc.)

   The *allocation* spend categories will not check the budget against the current or future fiscal year.

4) When completing the memos for lines with "FY** Allocation" spend categories, note the related fiscal year, and the appropriate related spend category. (ex: a line with the spend category "FY27 Allocation" should have the line memo: "FY27: Software License 530010")

Example for coding and effective dates:

Software Agreement effective for two years – Total Cost: $7,000 ($3,500/year)

Line 1: Service for current fiscal year - $3,500.00

- Dates of coverage 07/01/2025 - 06/30/2026
- Spend category: Software license (530010)
- Memo: Software for XYZ needs

Line 2: Service for following fiscal year - $3,500.00

- Dates of Coverage 07/01/2026 - 06/30/2027
- Spend Category: FY27 Allocation
- Memo: FY27-Software License 530010

Service Lines | Attachments | Balances | Process History

Service Lines 2 items

Line	Image	Item	Amount	Date
		Item Description Service Agreement for Testing purposes. Quote # 147 ...more Spend Category Software License (530010)	Requested 3,500.00 Ordered 0.00	Start Date 07/01/2025 End Date 06/30/2026
		Item Description Service Agreement. Year #2 Spend Category FY27 Allocation	Requested 3,500.00 Ordered 0.00	Start Date 07/01/2026 End Date 06/30/2027

Next Steps:

- Once your requisition is fully approved and the PO issued, you will enter invoices against the PO as usual.
- At the end of the fiscal year, Purchasing will roll over all multiyear POs that have not yet been fully invoiced (if a multi year PO is paid in full, rollover is not necessary)
- After the rollover is completed, Purchasing will issue a change order to update the PO and code the item to the current fiscal year spend category (ex: update “FY27 Allocation” to “Software License”) to ensure the expense reflects correctly in the new fiscal year’s budget. Once the change order is complete, you may enter your new fiscal year invoice(s) against the PO as usual.