

How to Enter a Requisition in Workday

Please note: Prior to creating a requisition, contracts will require a contract routing form be completed indicating the contract has been reviewed and approved by General Counsel and all other required parties.

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.

Please update the "Requisition Type" field. 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. Will require a project #.
- A *standard* purchase order indicates a request for a one time purchase of goods or service

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

5. Click



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

Create Requisition

Company: Simmons College Company | Requester: Anastasia Thrush | Currency: USD | Requisition Type: Standard Purchase Orders

Instructions

Use Request Non-Catalog Item for most orders. Simmons College does not maintain a catalog database. Use Connect to Supplier Website for WB Mason, WW Grainger, Zones and Henry Schein orders.

Please click the following link for Simmons College's [Purchasing Policy](https://internal.simmons.edu/~media/Simmons/About/Finance/Documents/Purchasing-Policy.ashx?la=en).

Select an Option

- Request Non-Catalog Items**
Add a good or service that is not in the catalog
- Connect to Supplier Website
Request goods and services from Supplier Websites
- Add from Templates and Requisitions
Select from Requisition templates and past Requisitions
- Select from My Procurement Favorites
Select from my Favorite items

- At the top of the next screen, you will be asked to select a “Non-Catalog Request Type”. Completing these fields will vary based on what is needed. Pages 3 and 4 will explain how to decide between a Goods or Service request and how to complete the related screens.

Request Non-Catalog Items

Company: Simmons College Company | Requester: Anastasia Thrush | Requisition Type: Standard Purchase Orders

Requisition Currency *

Non-Catalog Request Type

- Request Goods
- Request Service

Request Service – task oriented; services provided based on dollar amounts rather than quantity

Note: Majority of requests may be entered as a service without issue

****Blanket POs should always be entered as a service****

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

Item Description: Enter a description of the item being purchased. *This information will print on the purchase order to be sent to the supplier*, so include information the supplier will recognize, such as part numbers, proposal and quote numbers etc.

Spend Category: 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.

Supplier: Enter the supplier name here.

Supplier Contract: This field is not used.

Start Date/End Date: *This information will print on the PO* - If this particular service will begin and end on specific dates. You can enter the start and end dates here. It is not required and does not create any limitations as to when service can be provided or when invoices can be processed. It is just for reference.

Extended Amount: Enter the total cost of the service here.

Memo: This is not a required field. This is an internal memo that does not print on the PO – include any information that would be helpful to approvers to know about this line item being purchased. Ex: Item will replace outdated supply.

Request Goods – when physical objects are purchased

Note: Goods will need to be received in Workday by the requestor once delivered if entered as a goods request before an invoice is entered; for this reason, it is preferable for most requests to instead be entered as service requisitions

The screenshot shows a web form titled "Non-Catalog Request Type". At the top, there are two radio buttons: "Request Goods" (which is selected) and "Request Service". Below this is a section titled "Goods Request Details" containing several input fields: "Item Description" (a large text area with a red asterisk), "Supplier Item Identifier" (a text box), "Spend Category" (a dropdown menu with a red asterisk), "Supplier" (a dropdown menu), "Supplier Contract" (a text box containing "(empty)"), "Quantity" (a text box with "0" and a red asterisk), "Unit Cost" (a text box with "0.00"), "Unit of Measure" (a dropdown menu with "select one" and a red asterisk), "Extended Amount" (a text box with "0.00"), and "Memo" (a large text area). At the bottom of the form are three buttons: "Add to Cart" (orange), "Continue Shopping" (grey with a dropdown arrow), and "Cancel" (grey).

Item Description: Enter a description of the item being purchased. *This information will print on the purchase order to be sent to the supplier*, so include information the supplier will recognize, such as part numbers, proposal and quote numbers etc.

Spend Category: Enter the spend category/object code. You can enter the number, the name of the category, or use the dropdown lists provided to select the appropriate category.

Supplier: Enter the supplier name here.

Supplier Contract: This field is not used.

Quantity: Enter the how many of this item is being purchased (Ex: Enter 3 for purchasing 3 boxes of widgets)


Unit Cost: Enter the unit cost for each item (Ex: Enter 10.00 if the widgets are \$10 per box)

Unit of Measure: Select the appropriate unit of measure from the dropdown list. (Ex: Box)

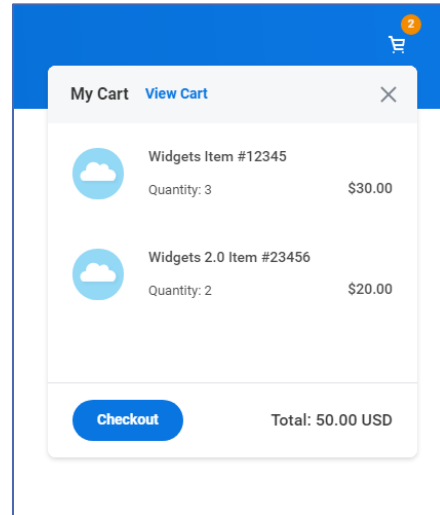
Extended Amount: This field auto calculates based on the quantities and unit costs entered.

Memo: This is not a required field. This is an internal memo that does not print on the PO – include any information that would be helpful to approvers to know about this line item being purchased. Ex: Item will replace outdated supply.

- Once determined whether you are creating a goods or services requisition; fill in the fields accordingly as described in step 7. Click “Add to Cart” to add the entered information as one line to 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.

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

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



- The Checkout screen is the final screen before submitting the requisition into the approval process and is separated into five dropdown sections.

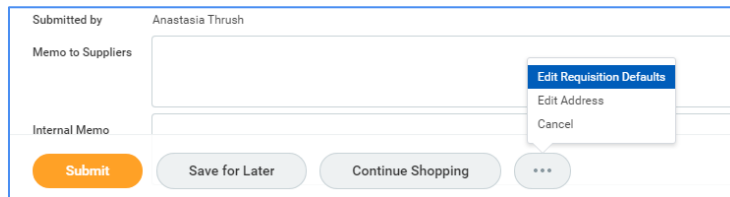
Shipping Address

Shipping Address

Deliver-To Main Campus > Main College Bldg. - Main Campus > Main College Bldg. - W207

Ship-To Address 300 The Fenway
Boston, MA 02115-5898
United States of America

The Shipping Address in most cases will default to 300 the Fenway and should be left alone. However, if needed, the address can be changed at this time by clicking the “...” at the bottom of the page and selecting “Edit Address”.



Requisition Information

The screenshot shows a form titled "Requisition Information" with a dropdown arrow. The fields are as follows:

- Request Date:** 03 / 24 / 2020 (with a calendar icon)
- Currency:** USD (with a dropdown menu icon)
- Requisition Type:** Standard Purchase Orders (with a dropdown menu icon)
- High Priority:**
- Sourcing Buyer:** (with a dropdown menu icon)
- Submitted by:** Anastasia Thrush
- Memo to Suppliers:** (empty text area)
- Internal Memo:** (empty text area)

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 change the type here if needed.

Sourcing Buyer: Do not use this field.

High Priority: Check the box to label a requisition high priority (Note: This does not change how the requisition will be processed in any way).

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"

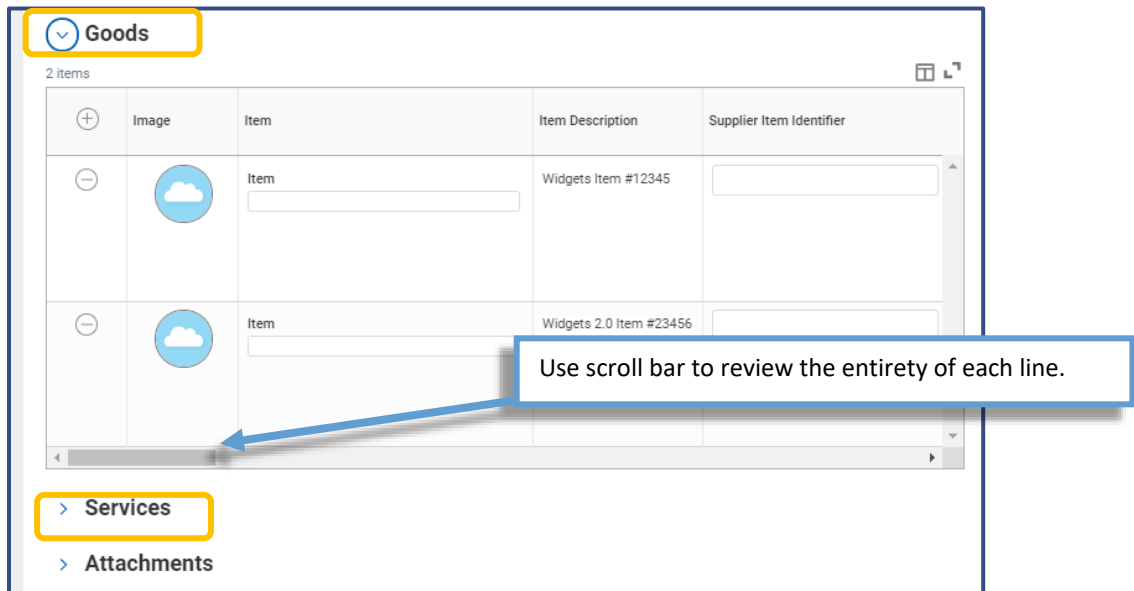
NOTE: Suppliers that have an email address on file will receive POs via email and you as the requester will be cc'd. If you require a paper copy mailed to the supplier or do NOT want the PO sent out, please indicate this in the internal memo field

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 process 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.

Goods/Services

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

Click the  for either Goods or Services (depending on the type of requisition you entered) then use the scroll bar to review each field.



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

Spend Category – Verify the correct spend category/object code 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.

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

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.

	*Cost Center	*Fund	*Program	Gift	Project	Additional Worktags	Splits
nd worn	510550 Procurement	111 Operating	500 Institutional Support			Line of Business: LOB002 Traditional	0
	510550 Procurement	111 Operating	500 Institutional Support			Line of Business: LOB002 Traditional	0



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

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 “-”

Goods

2 items

	Image	Item
+		
-		Item
-		Item

Services

Attachments

▼ Attachments

Drop files here

or

Select files

- Attachments are required for any purchase over \$5,000, but are recommended for all purchases
- Possible attachments include: quotes, proposals, rate sheets, contracts, sole source justifications, contract routing forms, etc.


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

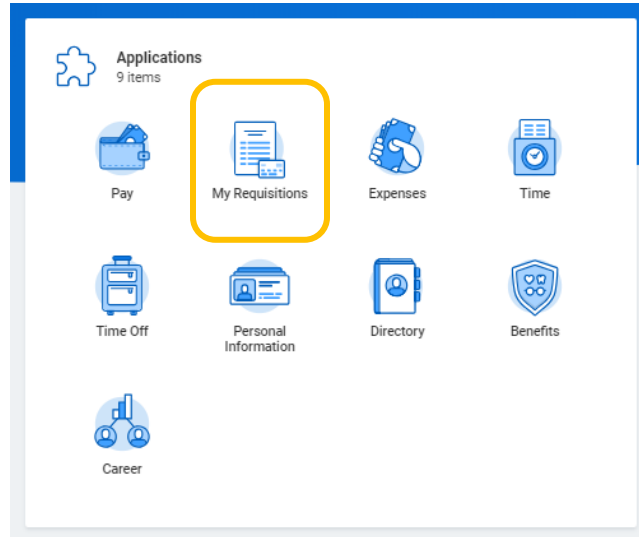
	Bid Completed by:	Bid Verification	Dollar Amount
No Quotes Required (but still recommended)	Department	None	<\$5,000
Quotations/Bids recommended by two (2) vendors in verbal, e-mail, or in writing	Department	None	Between \$5,000 and \$25,000
Quotations required by 3 vendors in writing, unless sole source or buying group contract.	Department	Bid Summary to be submitted to Purchasing	Between \$25,001 and \$100,000
Quotations required by three (3) vendors in writing, unless sole source or buying group contract.	Department and Purchasing	Purchasing to maintain	Over \$100,000

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

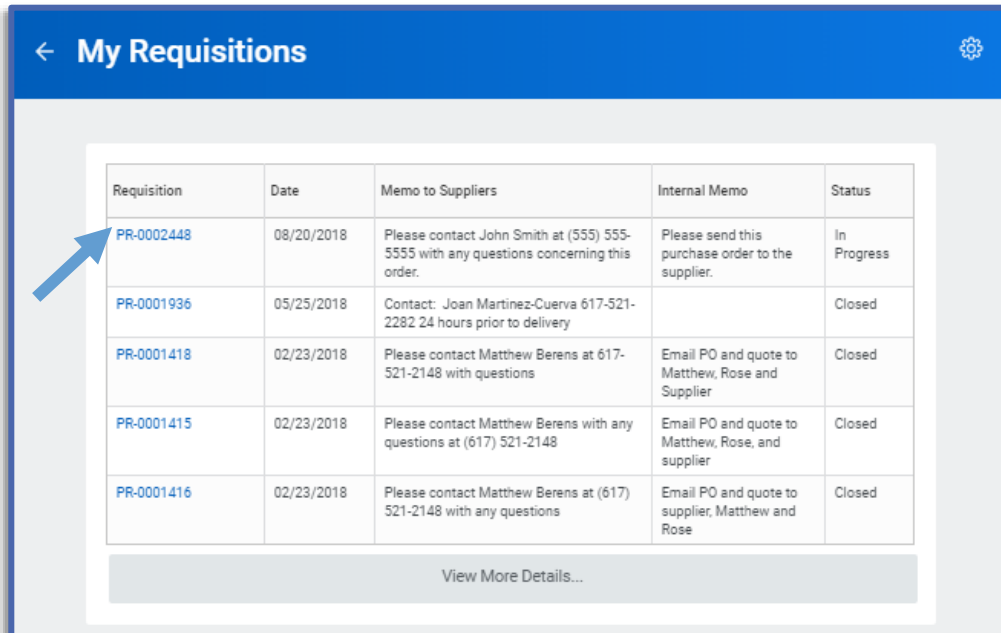
Budget Check Review

After clicking submit, your requisition will immediately go through a budget check. You will want to verify your requisition has passed the budget check by following these steps:

1. Click the Workday symbol  to go the home page, then click “My Requisitions”

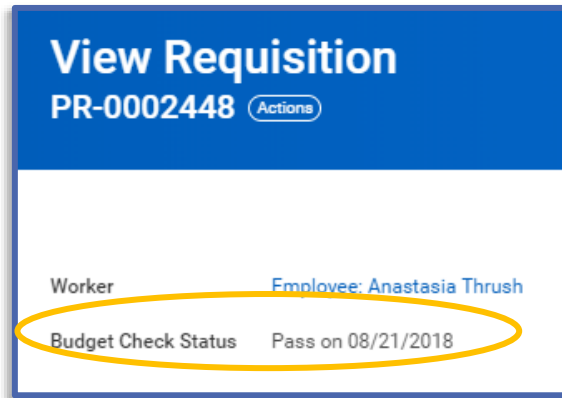


2. Your recently created requisitions will appear here. The most recent requisition will be the first listed.

A screenshot of the 'My Requisitions' page in Workday. The page has a blue header with a back arrow and a gear icon. Below the header is a table with five columns: Requisition, Date, Memo to Suppliers, Internal Memo, and Status. A blue arrow points to the first row of the table. Below the table is a button labeled 'View More Details...'.

Requisition	Date	Memo to Suppliers	Internal Memo	Status
PR-0002448	08/20/2018	Please contact John Smith at (555) 555-5555 with any questions concerning this order.	Please send this purchase order to the supplier.	In Progress
PR-0001936	05/25/2018	Contact: Joan Martinez-Cuerva 617-521-2282 24 hours prior to delivery		Closed
PR-0001418	02/23/2018	Please contact Matthew Berens at 617-521-2148 with questions	Email PO and quote to Matthew, Rose and Supplier	Closed
PR-0001415	02/23/2018	Please contact Matthew Berens with any questions at (617) 521-2148	Email PO and quote to Matthew, Rose, and supplier	Closed
PR-0001416	02/23/2018	Please contact Matthew Berens at (617) 521-2148 with any questions	Email PO and quote to supplier, Matthew and Rose	Closed

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



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 scrolling down on this screen and clicking: Process History.

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.