WB Mason Punch-Out Requisitions

1. Login to workday.simmons.edu

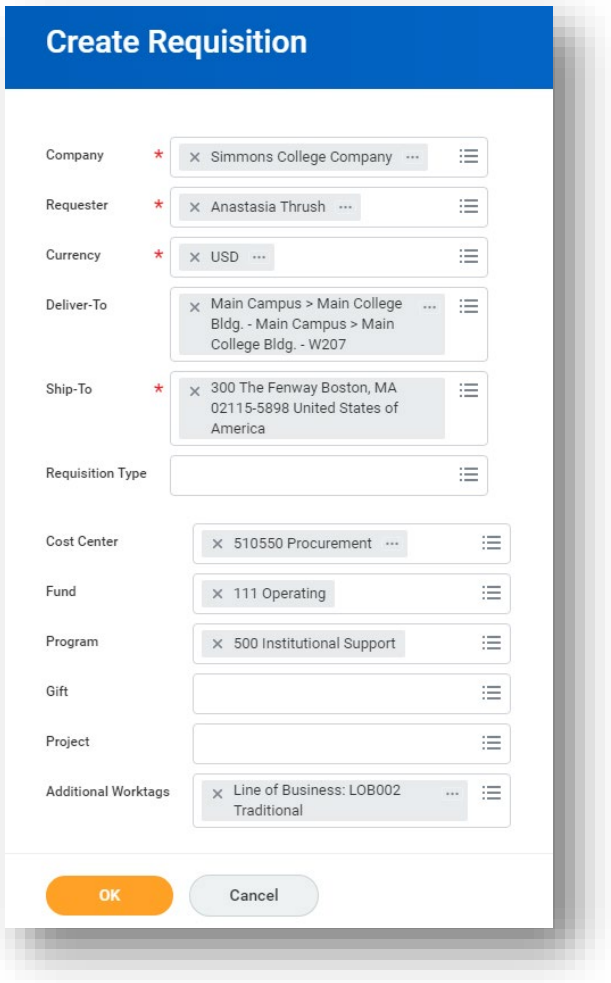
2. In the Search Bar, type “Create Requisition” Note: any abbreviation will also bring up the create requisition option eg: cre req, req etc

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.

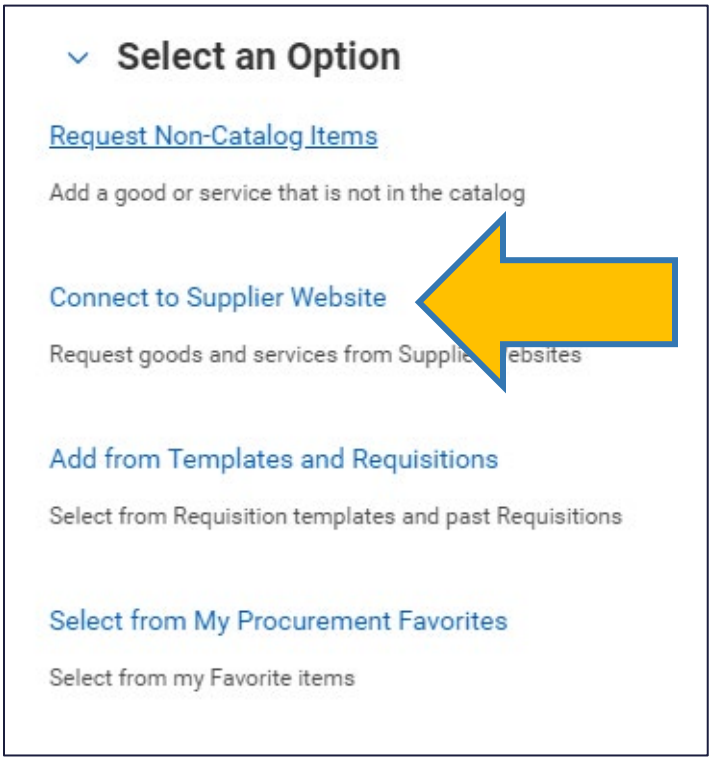
   Please update the “Requisition Type” field. For WB Mason orders, select “Standard Purchase Order” from the dropdown list as appropriate:

   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.

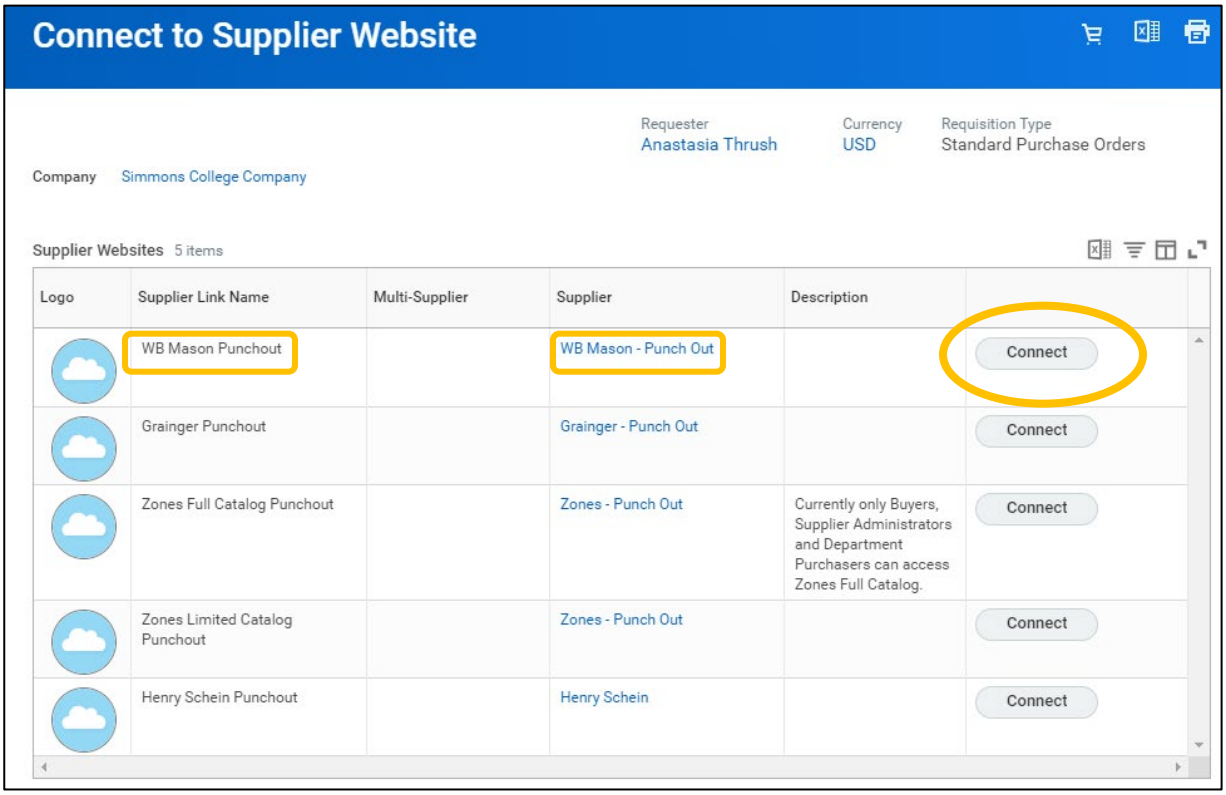


5. Click OK

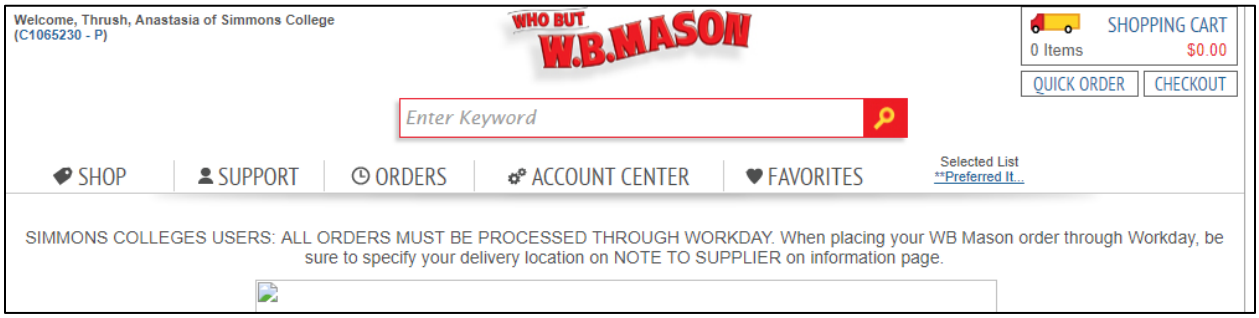
6. From the Select Options section on the next screen, click “Connect to Supplier Website”



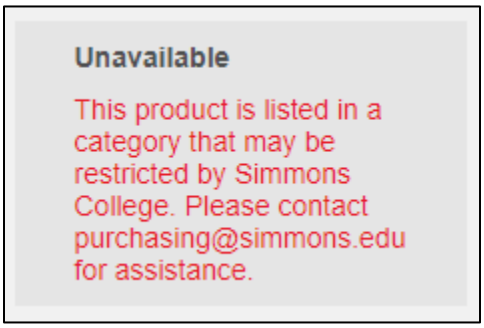
7. Click “Connect” on the WB Mason – Punch Out line



8. Clicking Connect will open the WB Mason website. Click the Shop tab or enter an item in the search bar to begin shopping. Add items desired to your shopping cart.

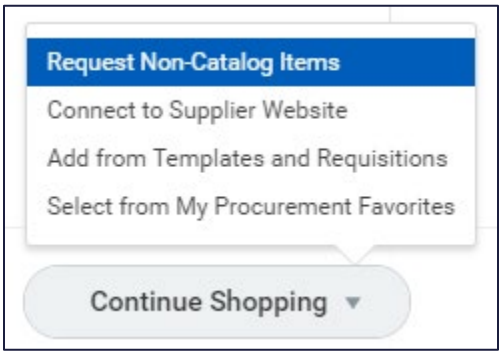


Some items available on WB Mason are restricted for purchase by Simmons. If you believe an item with this restricted message is needed, please contact Purchasing to request the item restrictions be lifted. Please include the item number and reason for purchase with your request.

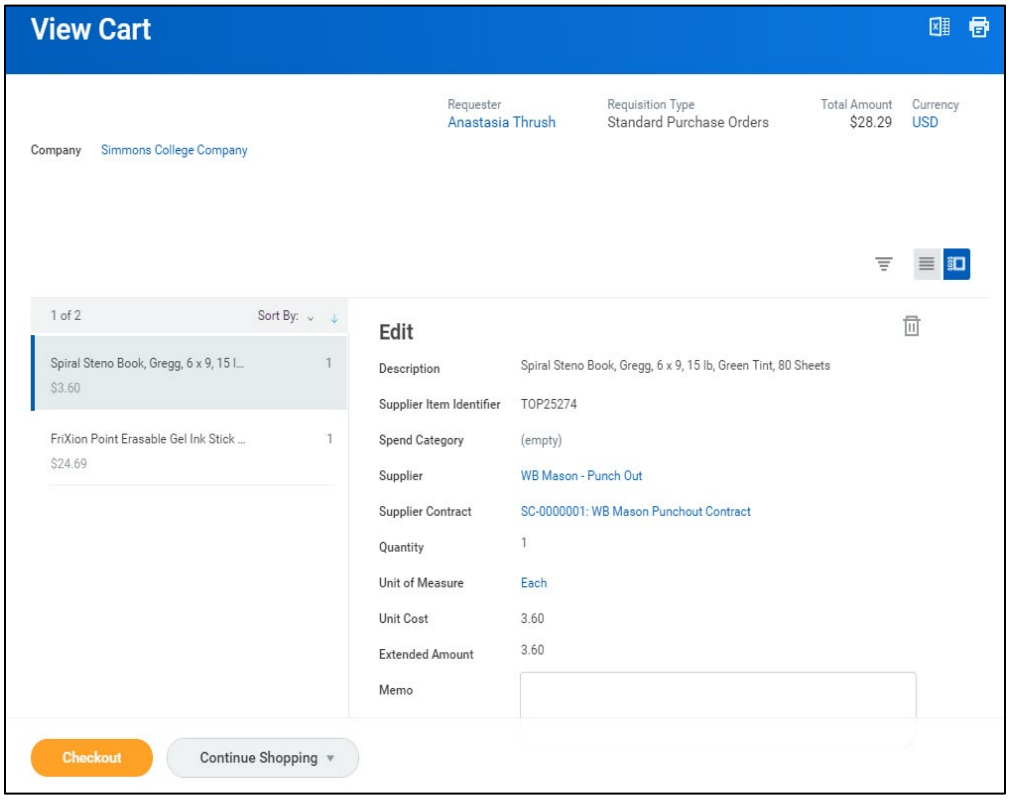


9. Once all items have been added to your WB Mason Shopping Cart, click “Continue to Checkout” or “Checkout” from the top right. This will bring you back to Workday.

Note: If you select checkout, but still have items to add to your order, you can return to the WB Mason site from Workday by clicking Continue Shopping then select Connect to Supplier Website. This will start a new shopping cart on WB Mason, but will not delete items already pulled into Workday for this order.



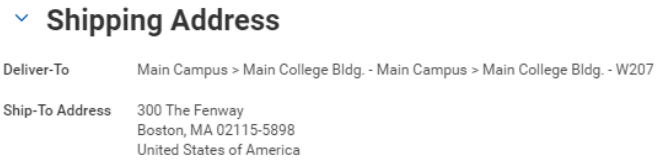
10. The View Cart Workday screen will list all items current requested for purchase.



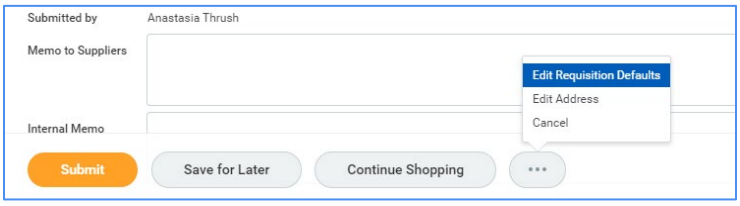
11. Click on the bottom left.

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

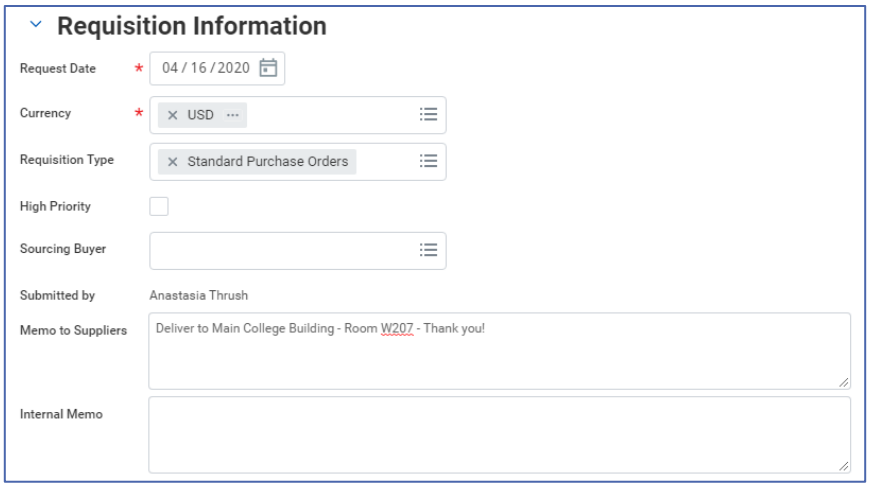
Shipping Address



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



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* and **you must specify in this field the building and room number to which these supplies should be delivered.** Failure to include this information could cancel your order.***

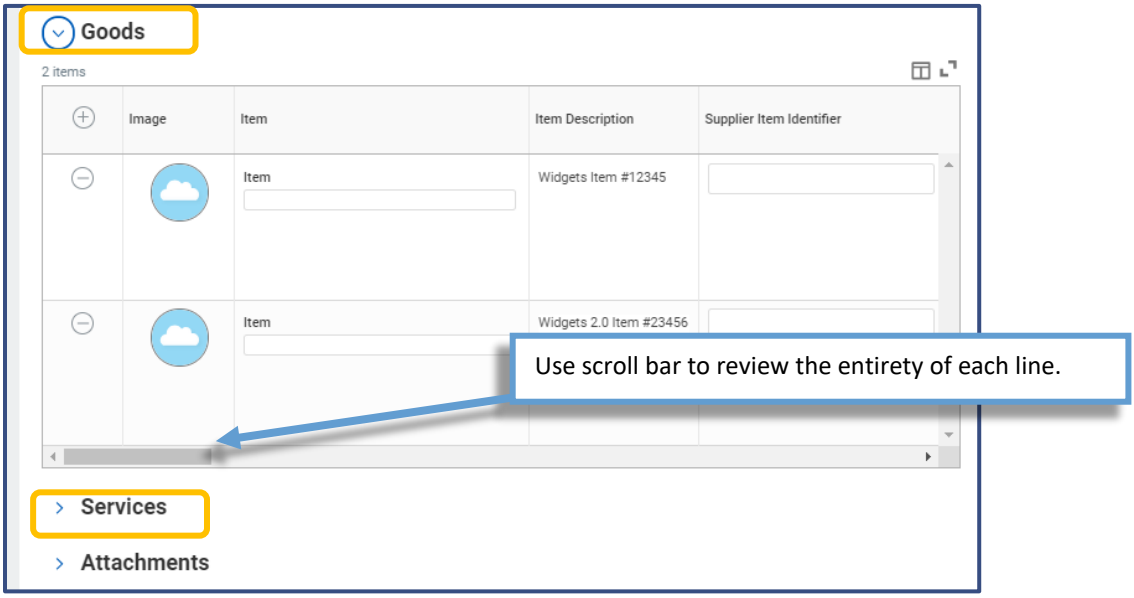
Internal Memo: This memo relates to the entire order and should be used to give any additional information to approvers and/or the Purchasing department

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.

Goods

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 Goods (WB Mason punch out orders are always Goods POs) 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 – 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.

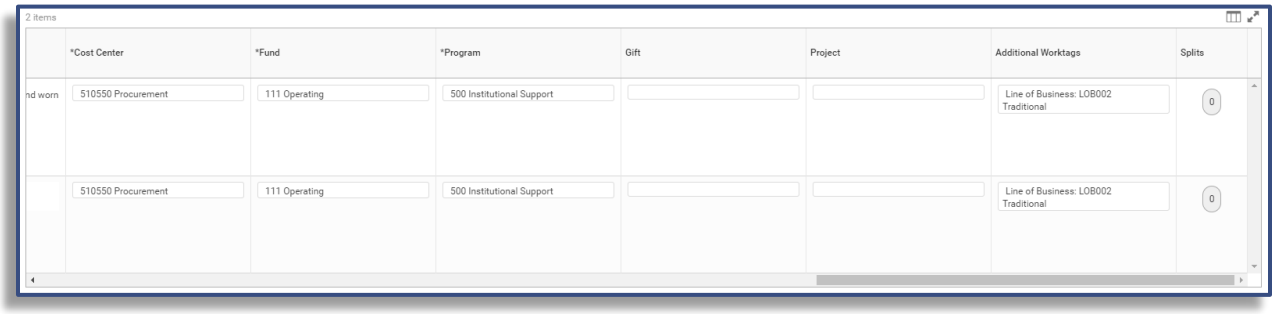
Fund – DO NOT CHANGE THIS FIELD – This will autofill based on the cost center, project, or worktag entered.

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.

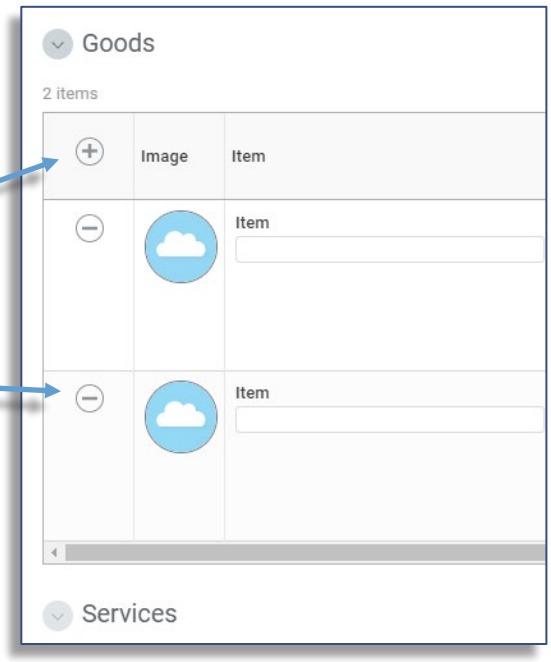


*Fields not listed are not used and should be left blank or as is.

NOTE: You can 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 "-"



Attachments

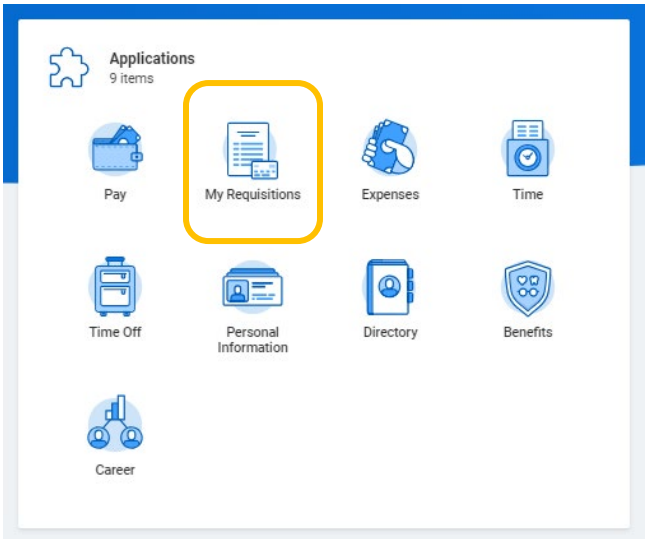
Attachments are not required for WB Mason Punchout orders.

13. Once all the coding is entered and verified, please double check that you included the delivery location in the Memo to Supplier, then click Submit on the bottom left. This begins the Business Process. The requisition is now in approval queues.

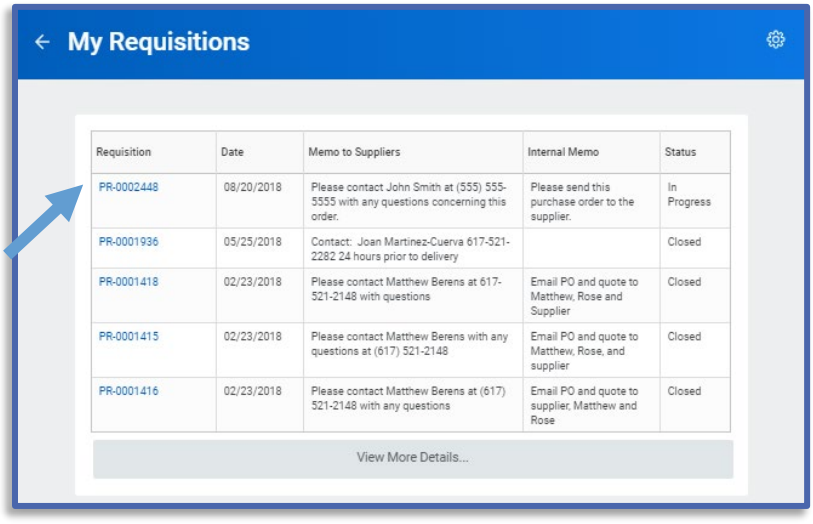
Budget Check and Approvals Review

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:

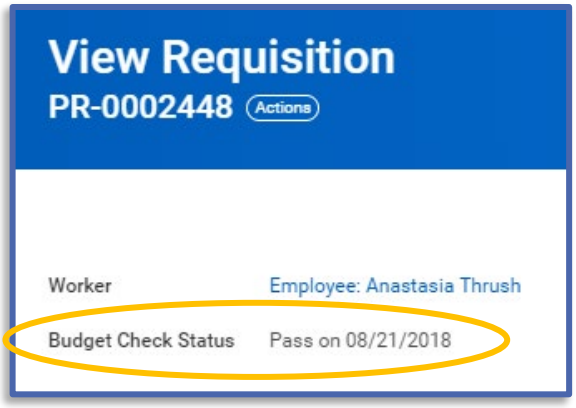
1. Click the Workday symbol to go the home page, then click “My Requisitions”



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



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.