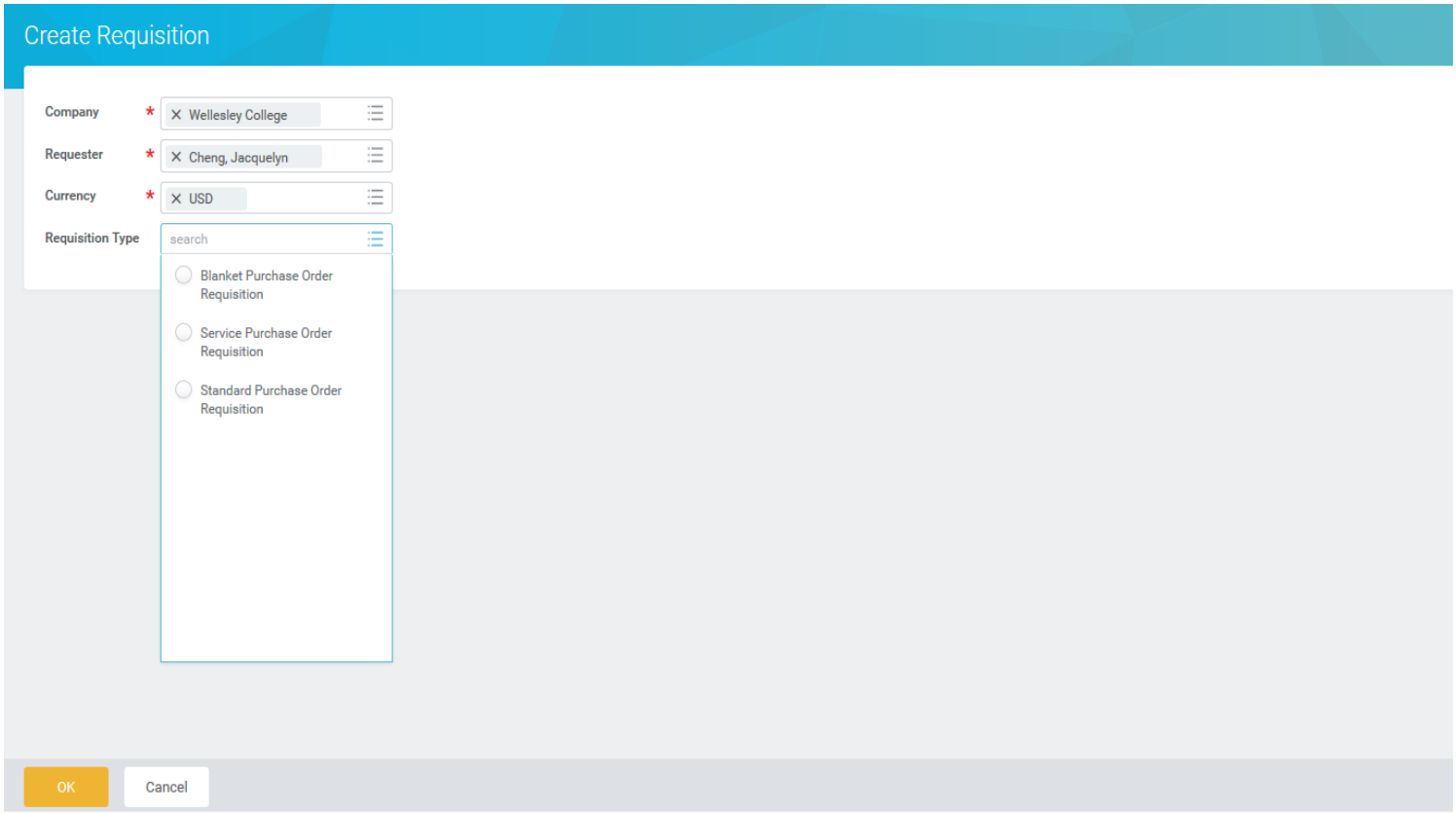
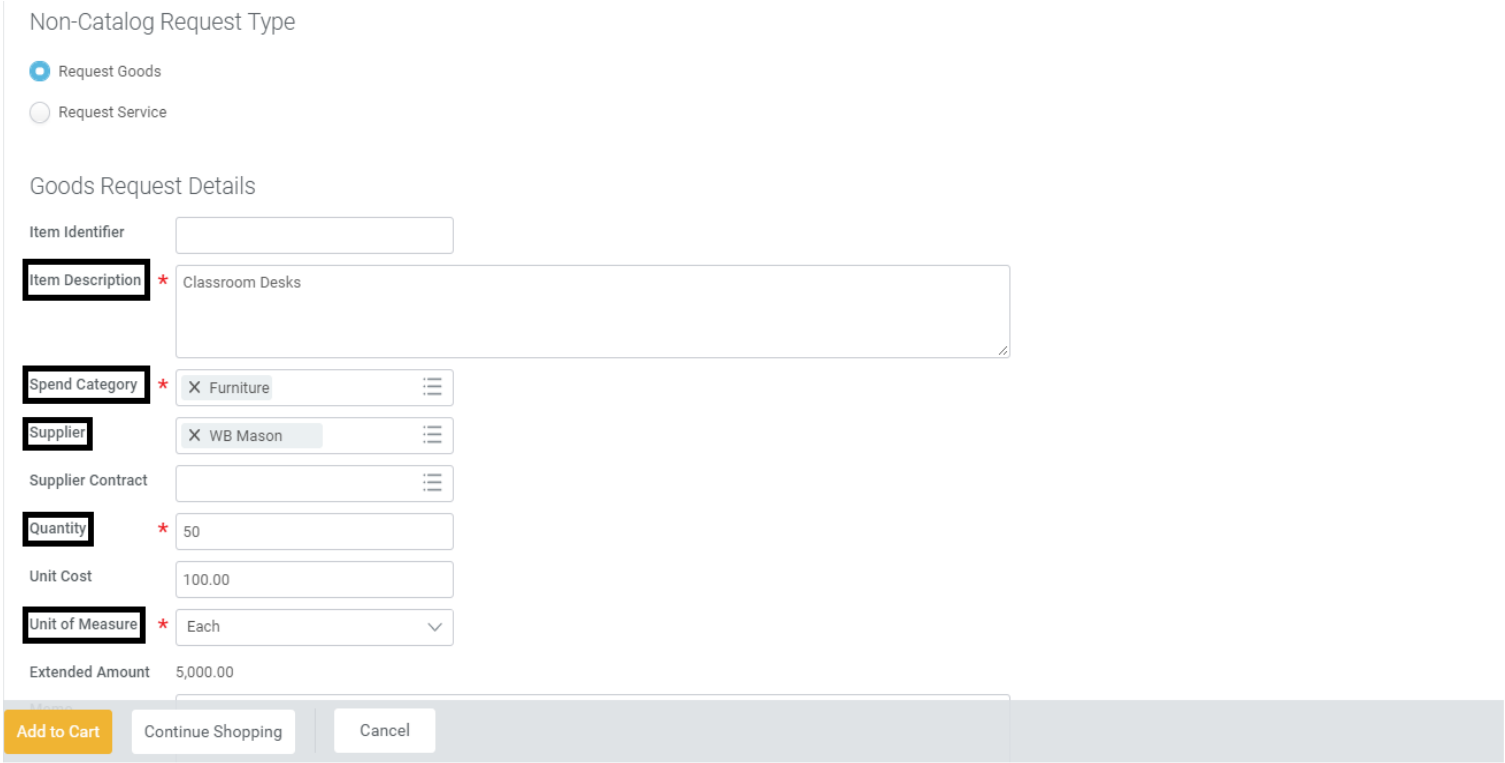
SUBMITTING A PURCHASE ORDER REQUISITION IN WORKDAY

Please follow the steps below for submitting a purchasing requisition:

- Log into Workday
- Before creating a requisition, you will need to check if the supplier has been created in Workday
    - In the search bar, type “Find Supplier”
    - Enter the name either in “Supplier” or “Supplier Name” and click OK to continue
    - If the supplier does not exist, please see the instructions for how to submit a supplier request here
    - If the supplier does exist, proceed with the steps below
- In the search bar, type “Create Requisition”
- Company will default to “Wellesley College”, Requester will default to your name, and Currency will default to USD.
- There are 3 Requisition Types you may select from:
    - Blanket Purchase Order Requisition
    - Service Purchase Order Requisition
    - Standard Purchase Order Requisition
- Click OK to continue

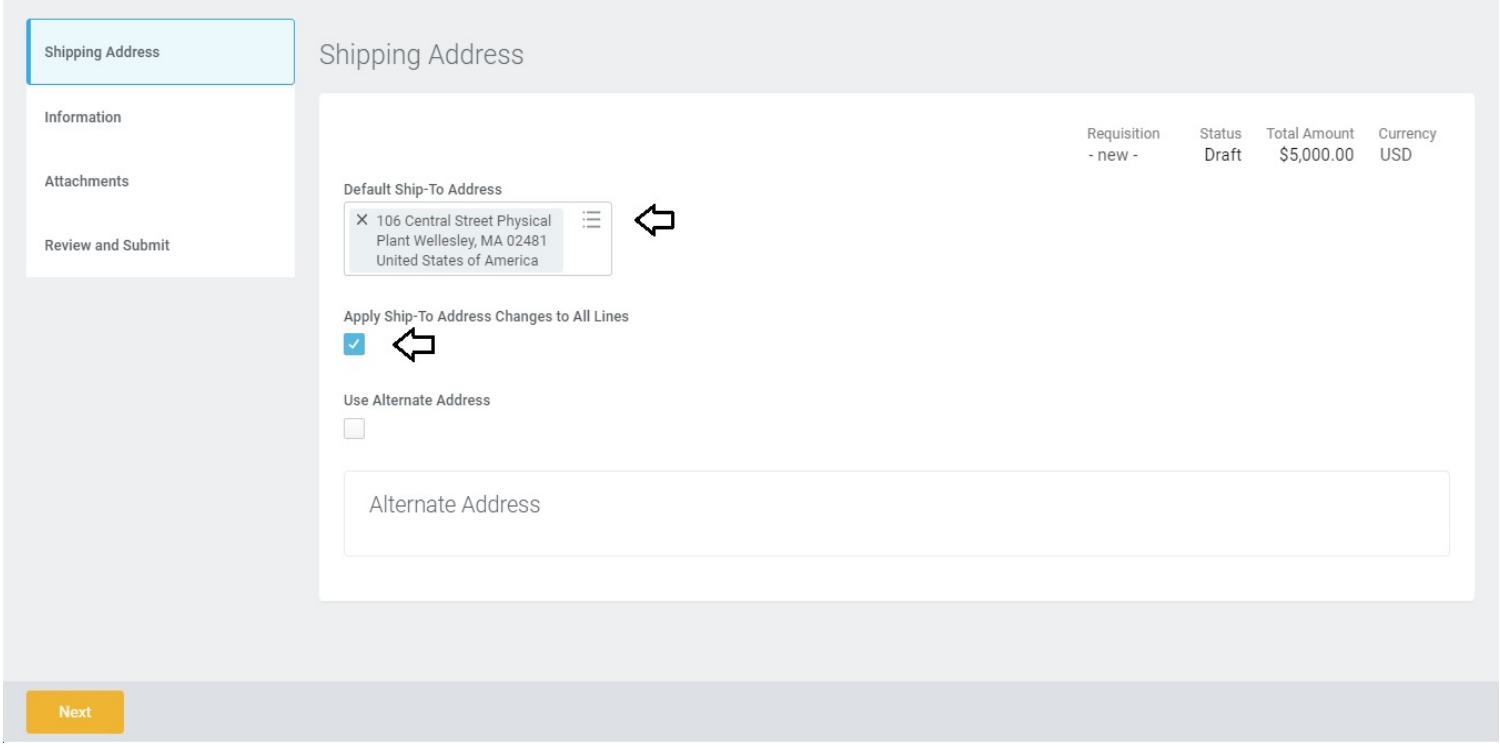


- Select “Request Non-Catalog Items” to create a requisition or request a contract
- Select “Add from Templates and Requisitions” to create a new requisition from templates or prior requisitions
- If you are creating a request for non-catalog items, the Company will default to “Wellesley” and the Requisition Currency will default to “USD”
- Non-Catalog Request Types consist of either “Request Goods” or “Request Service”
- Under Goods Request Details, enter the business description under “Item Description”
- Select the correct “Spend Category” (this was previously the “Account” in Banner) from the drop-down list
- Select the “Supplier”, select the Supplier Contract if one exists, enter the correct “Quantity”, “Unit Cost”, and “Unit of Measure”
- After all the correct information has been entered, click “Add to Cart”

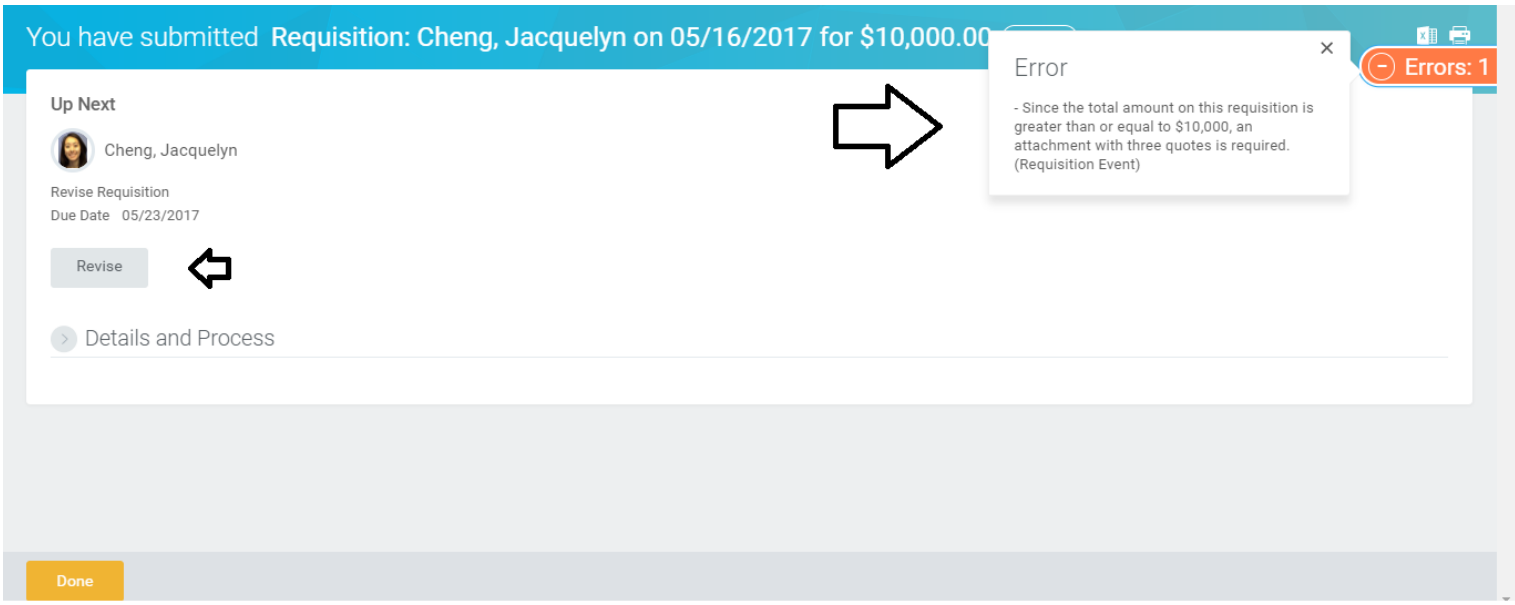


- If there are no additional lines in your requisition, click on the shopping cart in the upper right hand corner
- Review the information on the page and click “Checkout”

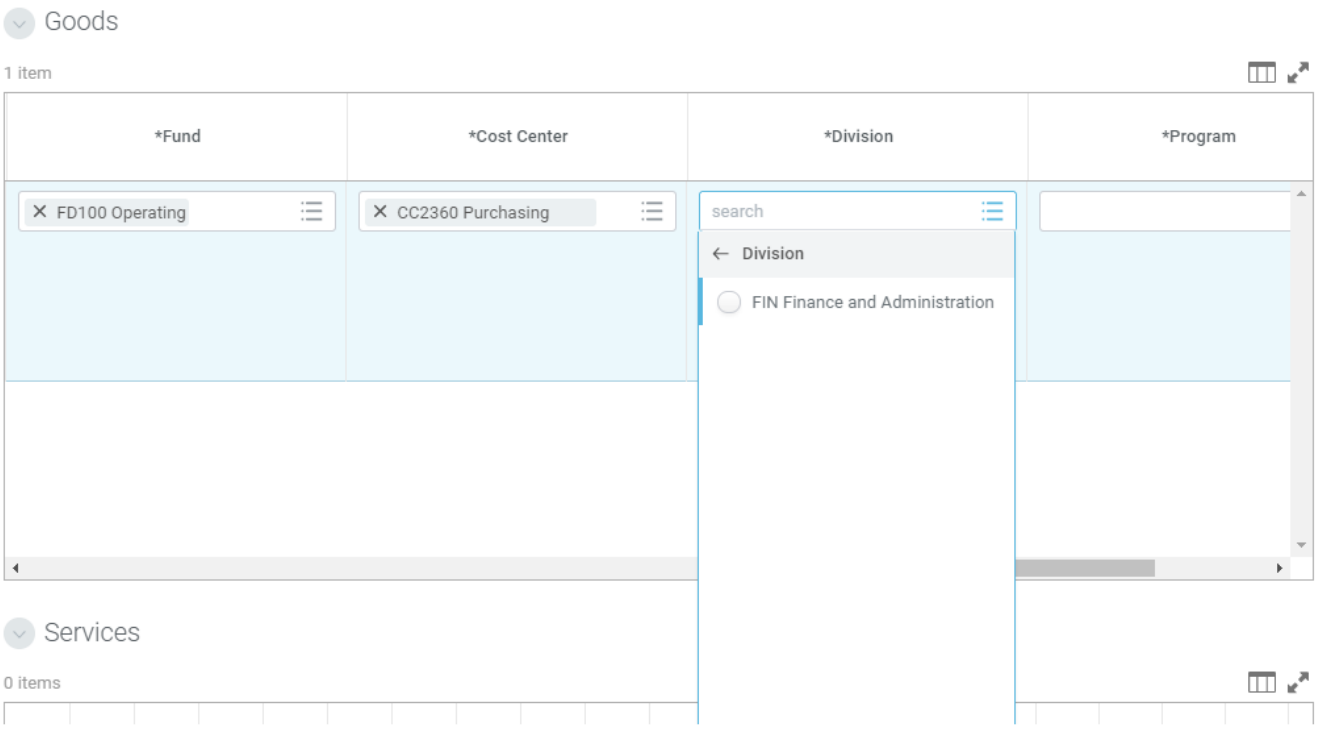
- Under “Default Ship-To Address” search for your building location on campus using the available drop-down list
    - Note: “Apply Ship-To Address Changes to All Lines” will automatically be checked off. If it is not, please manually select it or the building location will not be reflected on the Purchase Order.



- Click “Next” to proceed to the Information tab.
- After reviewing, click “Next” to proceed to the Attachments tab to upload any necessary documents
    - Note: Any requisition greater than or equal to $10,000 will require an attached Bid Form. If you are missing this required attachment you will receive an error message when you attempt to submit your request and be prompted to revise your requisition.



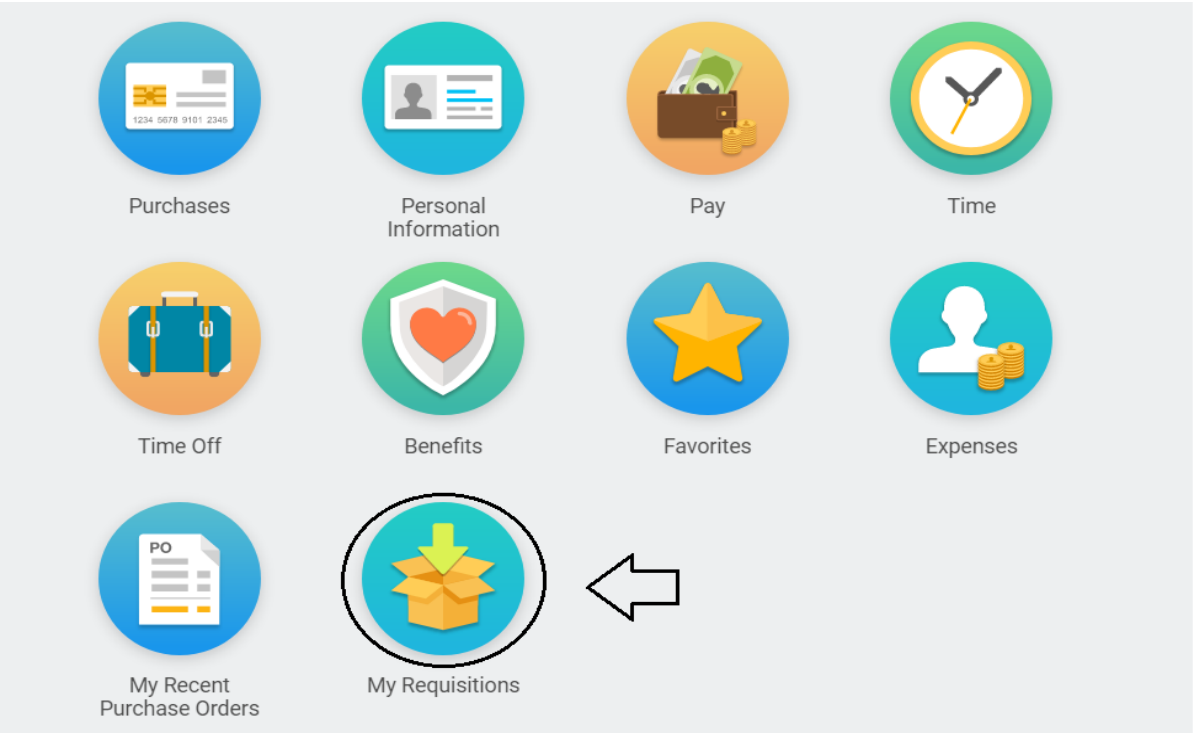
- Click “Next” to proceed to the Review and Submit tab
- Your default “Cost Center” (this was previously the “Org” in Banner) and your default Fund are automatically populated. Enter the correct “Division” and “Program” numbers.
    - Helpful tip: If you use the available drop-down list, there is only one division and one program associated with your Cost Center that can be selected.
    - Note: If you are reallocating to a different Cost Center other than your default, please select the new Cost Center first and the rest of the fields will auto-populate.



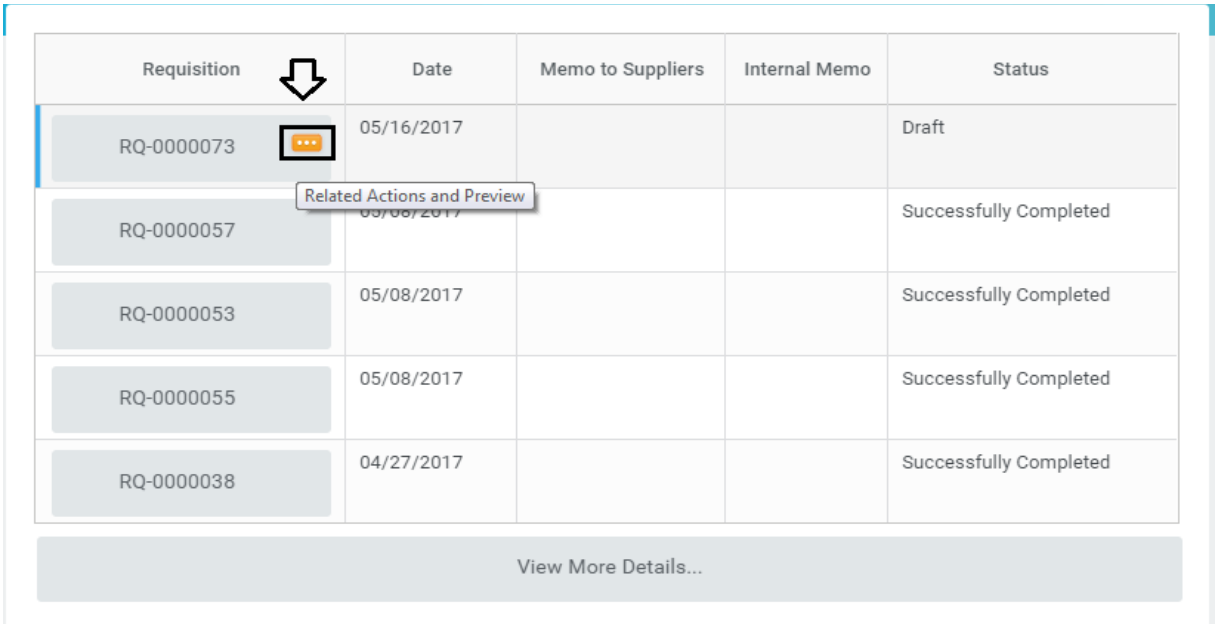
- After reviewing that all the entered information is correct and accurate, click “Submit”
- The “Next Step” is for the transaction to be routed to your Cost Center Manager for review
- After the Cost Center Manager approves the requisition, it will be routed to Purchasing for creation
    - Note: You will receive a notification when your requisition has been approved with the purchase order number
        - The notification will read for example: “The following purchase order: PO-0000073 Has been created for RQ-0000073”

If you wish to cancel or delete a requisition prior to submission, please follow the steps below:

- Log into Workday
- On your home page, if you already have this worklet saved, click on “My Requisitions”



- On your home page, if you do not have any worklets saved, type “My Requisitions” into the search bar
- Click on the “Related Actions and Preview” for the req you wish to delete



- Under “Actions” and “Requisition”, select “Cancel”