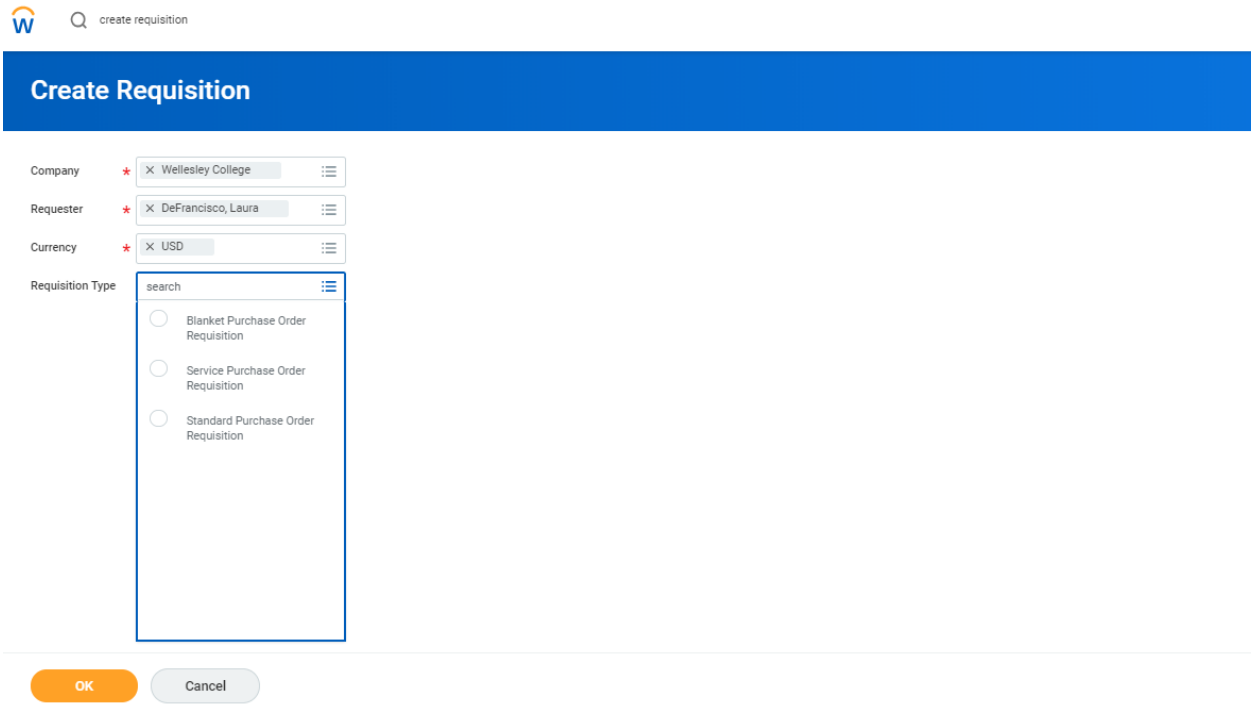
# SUBMITTING A PURCHASE ORDER REQUISITION IN WORKDAY

Please follow the steps below for submitting a purchasing requisition:

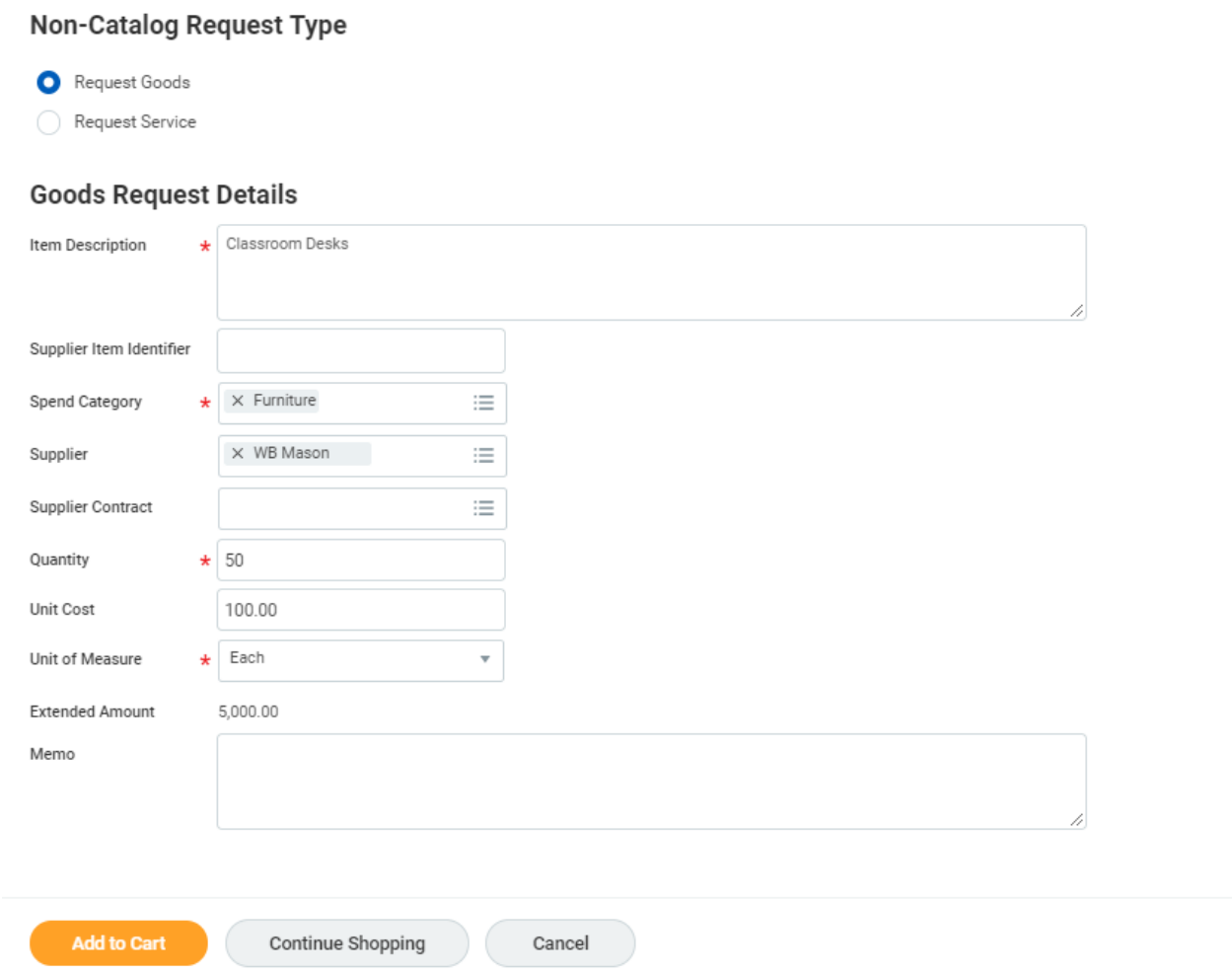
- Log into Workday
- Before creating a requisition, you will need to check if the supplier has been created in Workday:
    - In the search bar, type the name of the supplier. If the supplier appears, they have been set up as a supplier and you can proceed with the steps below.
    - If the supplier does not exist, you will need to set them up using the Wellesley College Supplier Registraton Form.
- 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.
- Select desired type and click OK to continue.



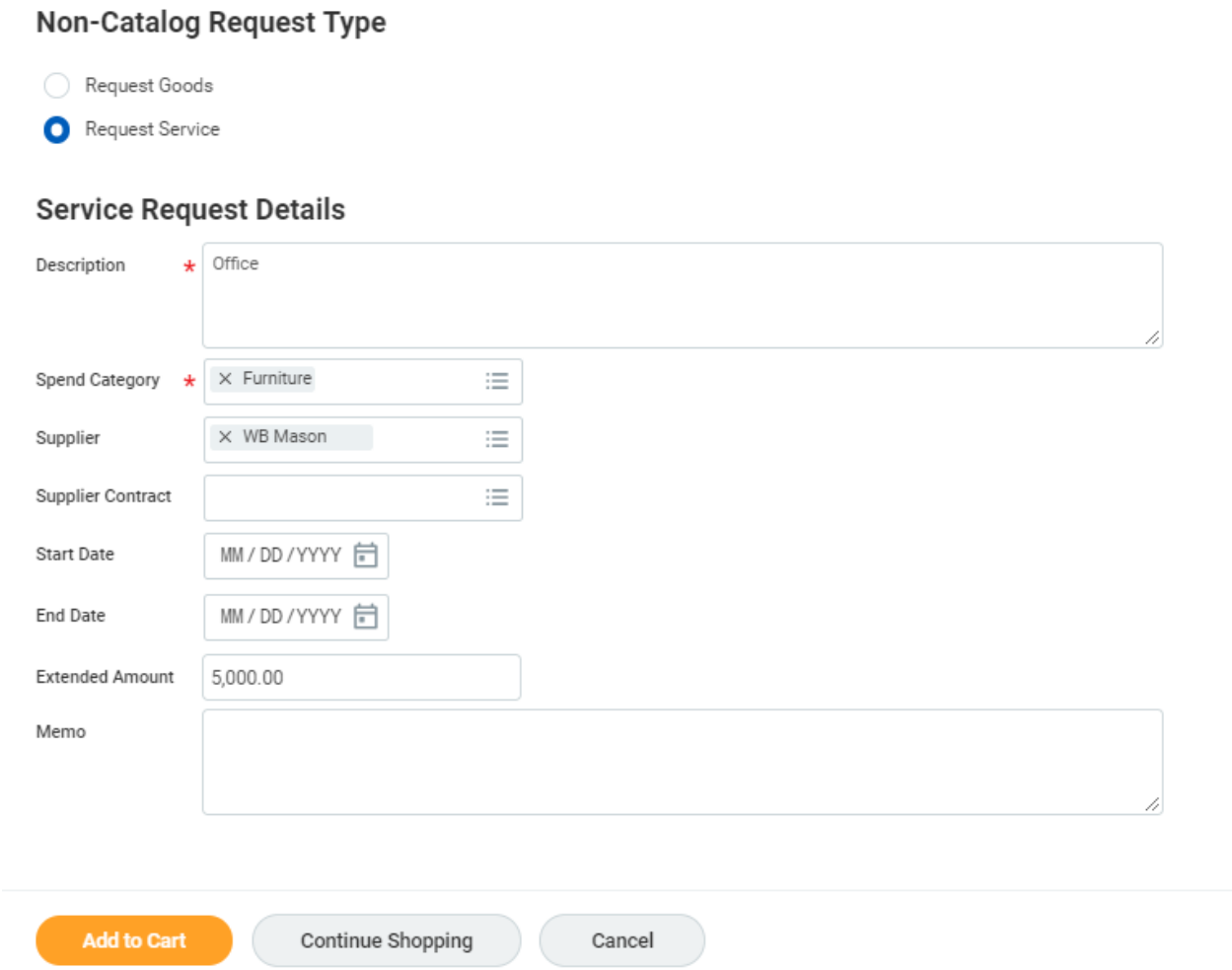

- Select "Request Non-Catalog Items" to create a requisition or to request a contract.
- Select "Add from Templates and Requisitions" to create a new requisition from templates or prior requisitions.

- 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”. **PLEASE NOTE: IF YOU ANTICIPATE YOU WILL RECEIVE MORE THAN ONE INVOICE AGAINST YOUR PURCHASE ORDER, YOU MUST SELECT “REQUEST SERVICE”.**
- Under Request Details, enter the business description in the “Description” box.
- Select the correct “Spend Category” (this was previously the “Account” in Banner) from the drop-down list.
    - **If requesting goods**, select “Supplier”, Supplier Contract if one exists, enter the correct “Quantity”, “Unit Cost”, and “Unit of Measure”.
    - **If requesting service**, select “Supplier” and “Extended Amount”.

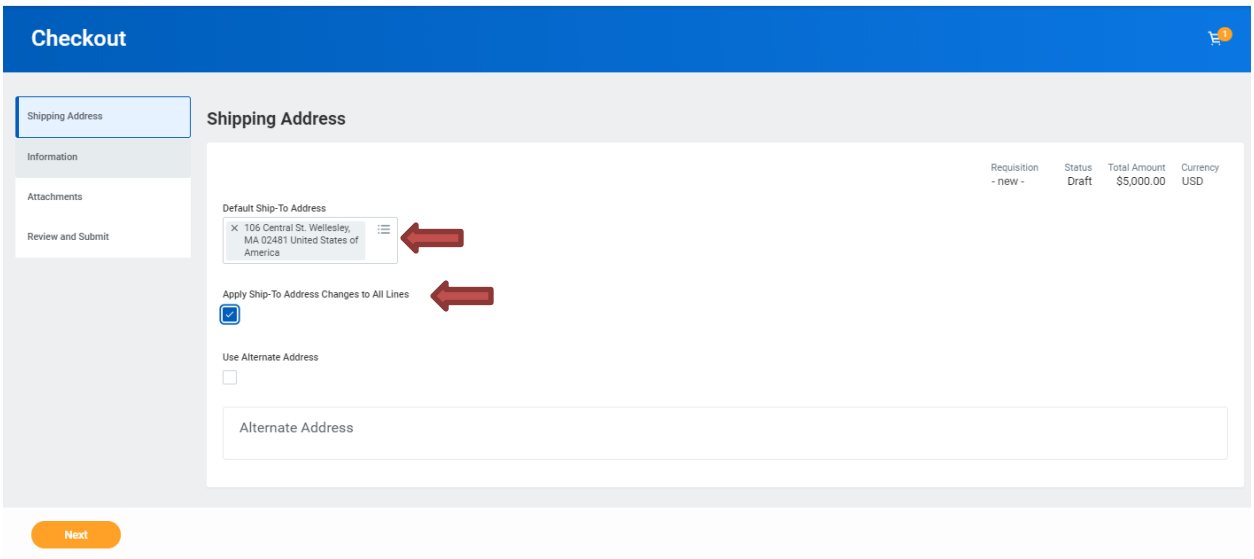
# Goods



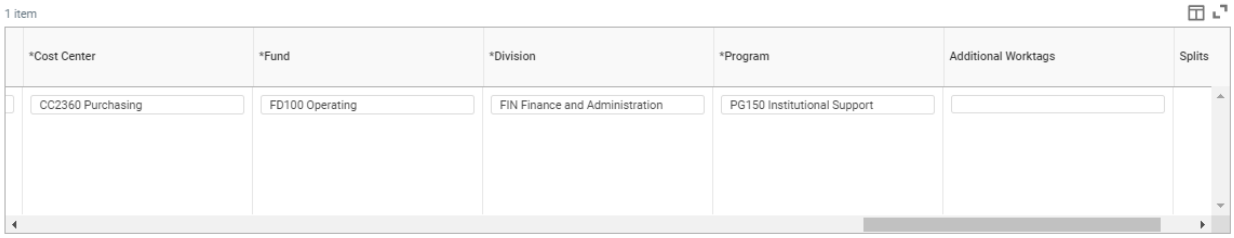
# Service




- After all the correct information has been entered, click “Add to Cart” and click “OK”.
- 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) is automatically populated.
    - Note: If you are reallocating to a different Cost Center other than your default, please select the new Cost Center <u>first</u> and the rest of the fields will auto-populate.




- After reviewing that all the entered information is correct and accurate, click “Submit”. The requisition will be routed to your cost center manager(s) for review. You can view the Process History by clicking on “Process” under “Details and Process”.

Up Next

Dolan, Tina M

Review Requisition
Due Date 08/21/2018

**Details and Process**

| | |
|---|---|
| For | RQ-0000826 |
| Overall Process | Requisition: RQ-0000826, Requester: DeFrancisco, Laura, Date: 08/20/2018, Amount: $5,000.00 |
| Overall Status | In Progress |
| Due Date | 08/27/2018 |

Details Process

Process History 3 items

| Process | Step | Status | Completed On | Due Date | Person | Comment |
|---|---|---|---|---|---|---|
| Requisition Event | Requisition Event | Step Completed | 08/20/2018 02:54:16 PM | 08/27/2018 | DeFrancisco, Laura | |
| Requisition Event | Review Requisition | Not Required | | 08/27/2018 | | |
| Requisition Event | Review Requisition | Awaiting Action | | 08/21/2018 | Dolan, Tina M (Cost Center Manager) | |

- After the Cost Center Manager approves the requisition, it will be routed to Purchasing for creation.
    - Note: You will receive a notification in your "Notifications" Workday inbox when your requisition has been approved with the purchase order number
        - The notification will read for example: "The following purchase order has been approved: [PO number].

## Purchase Order: PO-0000785, Supplier: WB Mason, Date: 08/20/2018, Amount: $5,000.00

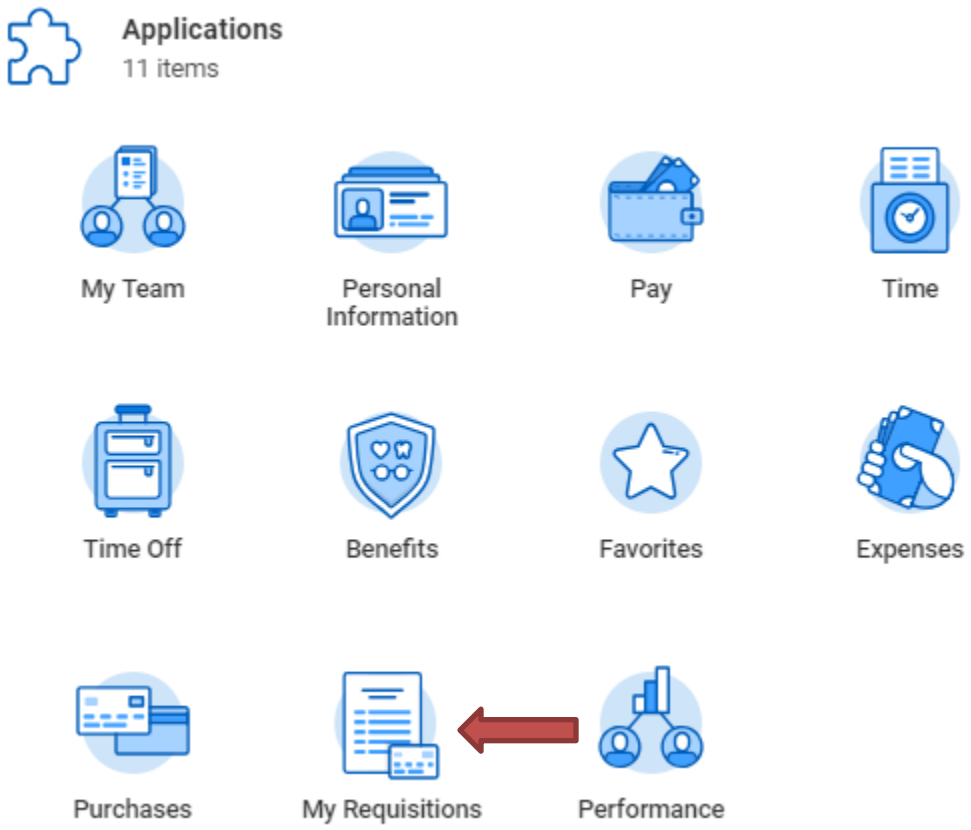
26 minute(s) ago

The following direct purchase order has been approved: PO-0000785

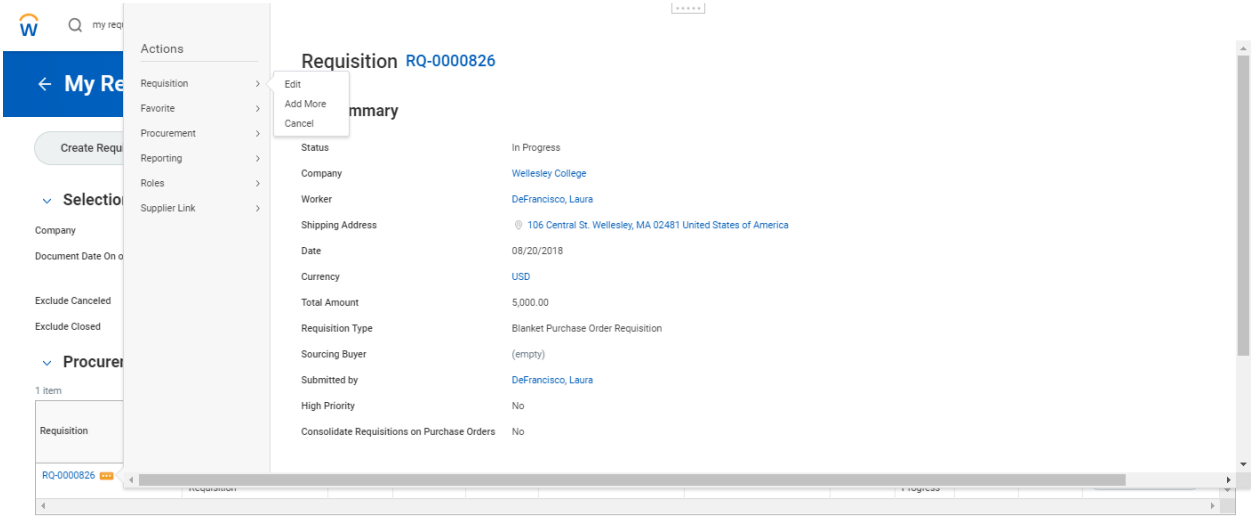
Details Purchase Order: PO-0000785, Supplier: WB Mason, Date: 08/20/2018, Amount: $5,000.00

If you wish to change or cancel a requisition prior to your cost center manager approving it, please follow the steps below:

- Log into Workday.
- On your home page click on “My Requisitions”, or type “My Requisitions” in the search bar.



- Click on the “Related Actions and Preview” (orange “twinkie”), hover your cursor over “Requistion”, and click either “Edit” or “Cancel”.




*Please note, once a requisition has been approved and a PO has been issued by Purchasing, the requisitioner can no longer make any changes. All changes must be requested by email and sent to Tina Dolan and Laura DeFrancisco for a PO change order.