

## BLANKET PURCHASE ORDER REQUISITIONS

**Please read the help text.** Blanket POs used to be known as Open POs and follow the same rules as Open POs in IFAS.

## CREATE A REQUISITION

From the Home page:



1. Type **cre req** in the search bar and hit **Enter**.
2. Click the **Create Requisition** link from the Tasks and Reports list.



3. The **Company** and your **name** will default into the fields. Note that the Company field will default in from your last Requisition transaction.
4. Use the **Prompt** icon  or type to indicate the **Requisition Type** of **Blanket Purchase Order Requisitions**.

Company	*	X Grossmont-Cuyamaca Community College District	
Requester	*	X John Doe	
Currency	*	X USD	
Requisition Type		X Blanket Purchase Order Requisitions	

5. Click 

## REQUEST NON-CATALOG ITEMS

From the **Create Requisition** screen:

 Select an Option

[Request Non-Catalog Items](#)

1. Click the **Request Non-Catalog Items** link Add a good or service that is not in the catalog

- The **Request Goods** radio button will default.
- Leave the **Item Identifier** field blank.
- In the **Item Description** field, type to indicate what the Blanket PO will be for, which Fiscal Year dates, and the Authorized Signatories.
- Use the **Prompt** icon  or type to indicate the **Spend Category**.
- Leave the **Supplier** field blank. You'll have an option to input the supplier later and will only need to do it once to apply to all lines.
- The **Quantity** field should reflect the total dollars of the Blanket PO. For example, if this is a \$1000 Blanket PO, then the Quantity should say 1000.
- The **Unit Cost** for a Blanket PO will always be 1.00.
- Use the **Prompt** icon  or type to select the appropriate **Unit of Measure**. The **Unit of Measure** for a Blanket PO will always be **Each**.

#### Goods Request Details

Item Identifier	<input type="text"/>
Item Description *	Blanket PO for custodial supplies. From 07/01/16 through 06/30/17 Authorized Signatories: - Bobbie Joe - Billie Jean
Spend Category *	X 4310 General Supplies 
Supplier	<input type="text"/> 
Supplier Contract	(empty)
Quantity *	<input type="text" value="1000"/>
Unit Cost	<input type="text" value="1.00"/>
Unit of Measure *	Each 
Extended Amount	1,000.00

- Workday will automatically calculate the math and display it in the Extended Amount.

**Add to Cart**

- Click  to add the line to the Requisition.

**OK**

- Click . Notice how that item was added to the cart in the top right of the screen.



Requisition Type  
Blanket Purchase Order Requisitions

- Repeat steps 4 – 12 until all lines have been added to your Requisition, if needed. Typically, Blanket POs only have one line item.

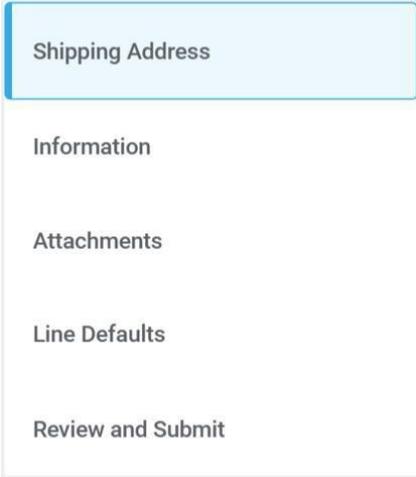
14. Once you are ready to continue, click on the **Cart** icon .

15. The Cart screen displays. Click .

## CHECKOUT REQUISITION

From the **Checkout** screen:

1. Double-check that the **Ship-To Address** matches the requester's campus location.

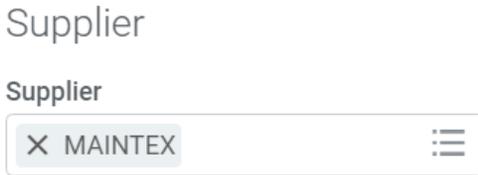


The screenshot shows a sidebar menu with the following items: Shipping Address (highlighted with a blue border), Information, Attachments, Line Defaults, and Review and Submit.

2. Click  or click on the **Information** section.
3. Leave the **Memo to Supplier** field blank. Purchasing will determine what special notes need to be added here.
4. Type to input any special notes for Purchasing in the **Internal Memo** field. These notes will not print on the PO.

5. Click  or click on the **Attachments** section. Drag and drop documents that need to be attached to the requisition. Blanket POs will require the Signatures Attachment.

6. Click  or click on the **Line Defaults** section.
7. Use the **Prompt** icon  or type to select the **Supplier** field. This will apply to all Requisition lines.



The screenshot shows a text input field labeled 'Supplier' with a dropdown menu. The dropdown menu is open, showing 'X MAINTEX' and a menu icon.

8. Scroll down to the **Default Worktags and Splits** portion of the Line Defaults section.

## Default Worktags and Splits

Select worktag defaults for all lines on the any changes you may have made at the lin

### Copy from Worktags Template

- If you have saved a Worktags Template prior: select the applicable worktag combination by using the **Prompt** icon  or typing. If you do not have a saved template, then see Activity 6.1.
- If you are using a worktag combination that has not been saved as a template: check the **Use Default Worktags** radio button. Default worktags will display. Use the **Prompt** icon  or type to input the correct **SmartKey** worktag.

- Use Default Worktags  
 Use Default Splits  
 None of the above

1 item

*Location	*SmartKey	*Fund	*Cost Center
<input type="text" value="X DS District Offices &gt; DS_80 District Annex &gt; DS_80_861_A"/>	<input type="text" value="X 1113501_IS-General"/>	<input type="text" value="X 11 Unrestricted General Fund"/>	<input type="text" value="X CST_1135 DS Information Systems"/>

**NOTE:** The **Location** field is to assist the Warehouse to deliver the goods. This should be the **office number where the items will be delivered**, NOT the building and NOT the college/district. Check the [staff](#) directory for your exact room number.

- Use the **Prompt** icon  or type to input the **Location**. It is recommended to type to room **number** (e.g. 142) and click **Enter** to see your options.

Next

- Click **Next** or click on the **Review and Submit** section.
- The **Request Date** defaults to today.
- Review the Requisition.
- Scroll on the line items and remove the **Ship-To Contact** and **Deliver-To** values by clicking on the **X**.

*Ship-To Address	Ship-To Contact	Deliver-To
<input type="text" value="X 8800 Grossmont College Drive El Cajon, CA 92020 United States of America"/>	<input type="text" value="X hill [C]"/>	<input type="text" value="X Offices"/>

Once you have resolved all error messages and made any further edits on the line level,

Submit

click **Submit** to run the budget check and move this along for approval.