REGULAR REQUISITIONS

Most requisitions will be Non-Catalog Items requisitions and will be Regular Requisitions. These will go through a 3-way match requiring a PO, Receipt, and Invoice prior to payment. **Please read the help text.**

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.

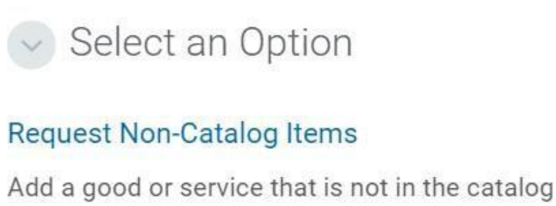
3. The **Company** and your **name** will default into the fields. Note that the Company field will default in from your last Requisition transaction.
4. Use the **Prompt** icon or type to indicate the **Requisition Type** of **Regular Requisitions.**

5. Click 

REQUEST NON-CATALOG ITEM

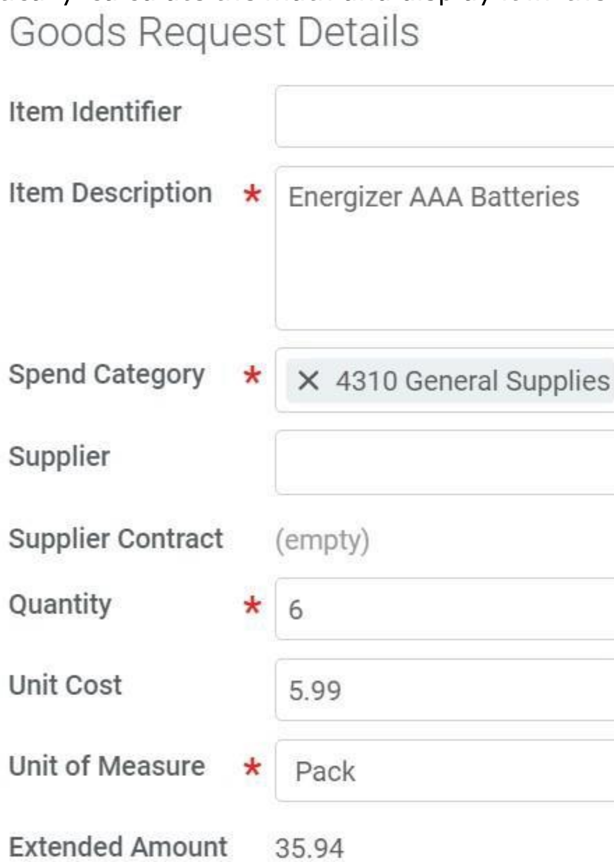
From the **Create Requisition** screen

1. Click the **Request Non-Catalog Items** link.



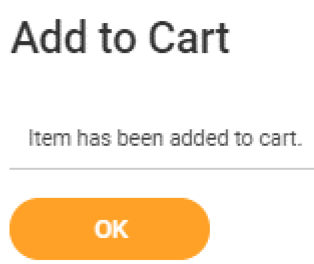
2. The **Request Goods** radio button will default.
3. Leave the **Item Identifier** blank.

4. Type in an **Item Description**. Make sure that the description is sufficiently detailed (e.g. including part number, brand, color, etc.) enough for Purchasing to find a similar product, if needed.
5. Use the **Prompt** icon or type to indicate the **Spend Category**.
6. 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.
7. Type to indicate the **Quantity, Unit Cost**. Use the **Prompt** icon or type to select the appropriate **Unit of Measure**.
8. Workday will automatically calculate the math and display it in the Extended Amount.



9. Click 

to add the line to the Requisition.



10. Click 

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

11. Repeat steps 3 – 10 until all lines have been added to your Requisition.

    NOTE: List each item separately and include all description information for each line item. Do NOT simply type "refer to attached quote".

12. Once you are ready to continue, click on the **Cart** icon 
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13. The Cart screen displays. Click 
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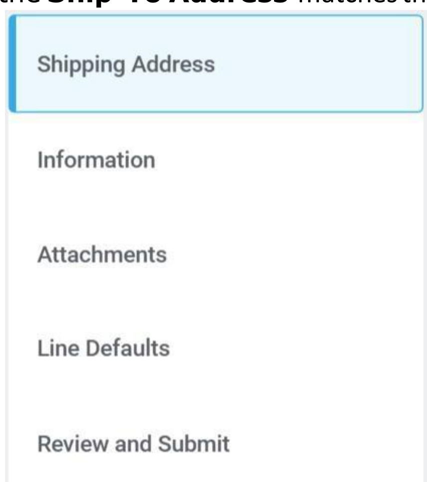
CHECKOUT REQUISITION

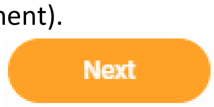
From the **Checkout** screen:

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



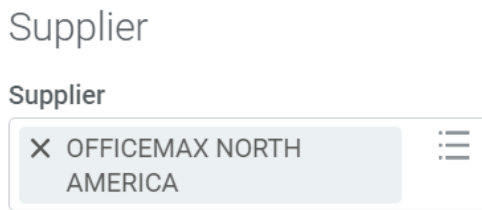
2. Click 

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 

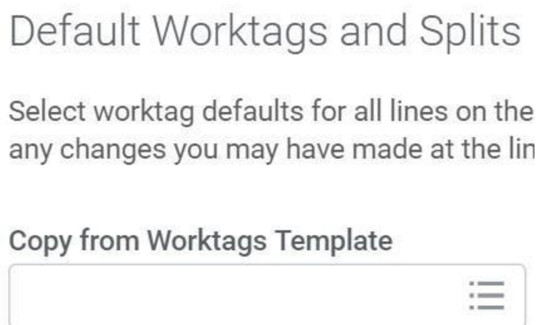
or click on the **Attachments** section. Drag and drop documents that need to be attached to the requisition (such as quotes, emails, or any electronic document).
6. Click 

or click on the **Line Defaults** section.

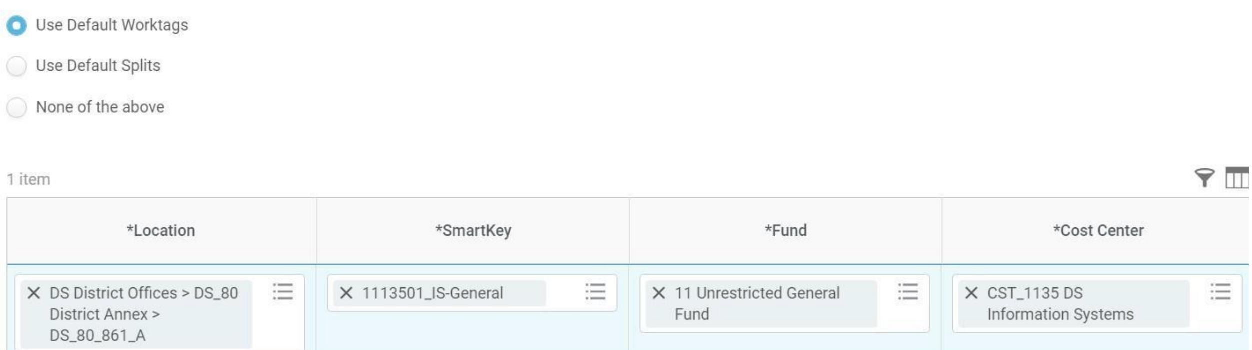
7. If applicable, use the **Calendar** icon or type to enter a **Requested Delivery Date**.
8. Use the **Prompt** icon or type to select the **Supplier** field. This will apply to all Requisition lines.



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



   a. 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.
   b. 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.

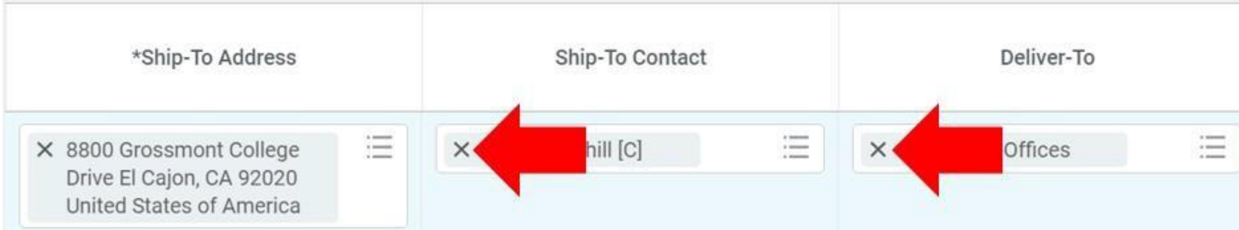


NOTE: The **Location** field is to assist the Warehouse to deliver the goods. This should be the **office number where the items will be delivered,** NOT the building and NOT the college/district. Check the staff directory for your exact room number. This should also be where the item ultimately needs to reside. The Warehouse will not move items multiple times.

10. 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.
11. Click 

or click on the **Review and Submit** section.
12. The **Request Date** defaults to today. Select the **Calendar** icon or type to change this as applicable.

13. Review the Requisition.
14. Scroll on the line items and remove the **Ship-To Contact** and **Deliver-To** values by clicking on the **X**.



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

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