

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.


Tasks and Reports

Create Requisition Worktags Template

Create Supplier Invoice Request

Create Requisition Template

Create Requisition

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**.

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


OK

5. Click

REQUEST NON-CATALOG ITEM

From the **Create Requisition** screen



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

 Select an Option

Request Non-Catalog Items

Add a good or service that is not in the catalog

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.

Goods Request Details


Item Identifier	<input type="text"/>
Item Description *	<input type="text" value="Energizer AAA Batteries"/>
Spend Category *	<input type="text" value="X 4310 General Supplies"/>
Supplier	<input type="text"/>
Supplier Contract	(empty)
Quantity *	<input type="text" value="6"/>
Unit Cost	<input type="text" value="5.99"/>
Unit of Measure *	<input type="text" value="Pack"/>
Extended Amount	35.94

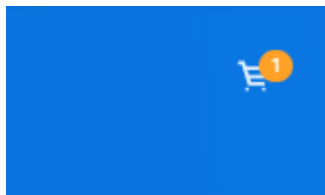
9. Click  to add the line to the Requisition.

Add to Cart

Item has been added to cart.

OK

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



Requisition Type
Regular Requisitions

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 .

Checkout

13. 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.

Shipping Address

Information

Attachments

Line Defaults

Review and Submit

Next



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.

Next

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).

Next

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.

Supplier

Supplier

X

OFFICEMAX NORTH AMERICA

⋮



9. 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

⋮

- 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.

☒ Use Default Worktags



☐ Use Default Splits

☐ None of the above



1 item

*Location	*SmartKey	*Fund	*Cost Center
<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> X <div style="flex-grow: 1;">DS District Offices > DS_80 District Annex > DS_80_861_A</div> ⋮ </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> X <div style="flex-grow: 1;">1113501_IS-General</div> ⋮ </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> X <div style="flex-grow: 1;">11 Unrestricted General Fund</div> ⋮ </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> X <div style="flex-grow: 1;">CST_1135 DS Information Systems</div> ⋮ </div>

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 Next 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**.

*Ship-To Address	Ship-To Contact	Deliver-To
<div>✕ 8800 Grossmont College Drive El Cajon, CA 92020 United States of America</div>	<div>✕  hill [C]</div>	<div>✕  Offices</div>

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

Submit

level, click
approval.

to run the budget check and move this along for