

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.


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 **Blanket Purchase Order Requisitions**.

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

OK

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 

2. The **Request Goods** radio button will default.
3. Leave the **Item Identifier** field blank.
4. In the **Item Description** field, type to indicate what the Blanket PO will be for, which Fiscal Year dates, and the Authorized Signatories.
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. 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.
8. The **Unit Cost** for a Blanket PO will always be 1.00.
9. 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 *	1000
Unit Cost	1.00
Unit of Measure *	Each 
Extended Amount	1,000.00

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

Add to Cart

11. Click to add the line to the Requisition.


OK


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



Requisition Type
Blanket Purchase Order Requisitions

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

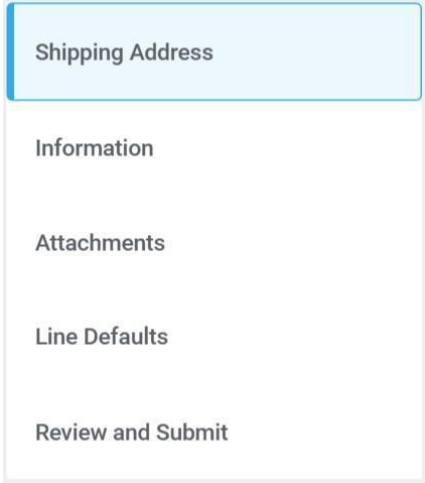
14. Once you are ready to continue, click on the **Cart** icon .


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.



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.

Supplier

Supplier





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
X DS District Offices > DS_80 District Annex > DS_80_861_A	X 1113501_IS-General	X 11 Unrestricted General Fund	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
X 8800 Grossmont College Drive El Cajon, CA 92020 United States of America	X  hill [C]	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.