

SERVICE REQUISITIONS



Please read the help text. Service Requisitions will be replacing the Request for Contract (aka RFC) form. You will no longer need to submit this form to Purchasing and you will not need to attach it to the requisition in Workday.


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.



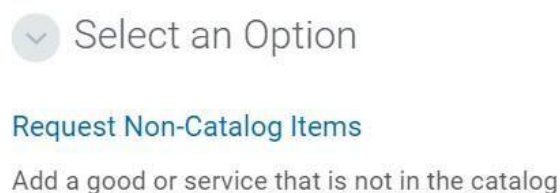
3. The **Company** and your **name** will default into the fields. Note that the Company field will default in from your last Requisition transaction.
4. Use the **Prompt** icon  or type to Use the **Prompt** icon  or type to indicate the **Requisition Type** of **Service Requisitions**.

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

5. Click .

REQUEST NON-CATALOG ITEMS

From the **Create Requisition** screen:






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





- Click to select **Request Service**


Non-Catalog Request Type


- ☐ Request Goods
- ☒ Request Service

- Leave the **Item Identifier** field blank.
- In the **Item Description** field, type to include a description of the service or the work to be performed. This information should be as detailed as the information previously provided on the RFC and should also include the fiscal impact statement specifying the funding source.
- Use the **Prompt** icon  or type to indicate the **Spend Category**. This will need to correspond with the appropriate service (e.g. Contract, Professional Services).
- 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.
- Use the **Calendar** icon  or type to indicate the **Start Date** of the service.
- Use the **Calendar** icon  or type to indicate the **End Date** of the service.
- Type to fill the **Extended Amount** for this service. This could be **0.00** for certain types of services such as no cost memorandums of understanding or clinical education agreements.

Service Request Details

Item Identifier	<input type="text"/>
Description	<div><div>*</div><div>The supplier will provide training support for the Workday project including the facilitating of in-person training sessions, the creation and maintenance of the training manuals and videos.</div></div>
Spend Category	<div><div>*</div><div>X 5110 Consultants</div><div></div></div>
Supplier	<div><div></div></div>
Supplier Contract	(empty)
Start Date	<div>01 / 01 / 2017 </div>
End Date	<div>06 / 30 / 2017 </div>
Extended Amount	<input type="text" value="1,000.00"/>

- Click  to add the line to the Requisition.

- Click . Notice how that item was added to the cart in the top right of the screen.
- Repeat steps 4 – 11 until all lines have been added to your Requisition, if needed. Typically, service requisitions are only one line item.



Requisition Type
Service Requisitions

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



14. The Cart screen displays. Click

Checkout

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. Blanket POs will require the Signatures Attachment.

Next

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

X MAINTEX





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


- 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
 DS District Offices > DS_80 District Annex > DS_80_861_A 	 1113501_IS-General 	 11 Unrestricted General Fund 	 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.

9. 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

10. Click  or click on the **Review and Submit** section.
11. The **Request Date** defaults to today.
12. Review the Requisition.
13. 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
 8800 Grossmont College Drive El Cajon, CA 92020 United States of America 	  hill [C] 	  Offices 

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

Submit

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