

# Procurement: Requisition Management



This job aid details actions to Create a Requisition, Edit a Requisition, Cancel a Requisition, and Review / Approve a Requisition.

## PROCUREMENT MANAGEMENT

You have been asked to create a purchase requisition which will subsequently need to be approved. You can edit your requisition until its status is “Successfully Completed” (a PO is created for the requisition). Once the status is “Successfully Completed” you cannot edit your requisition.

### TABLE OF CONTENTS:

Create Requisition Guidelines .....	Page 1
Create Requisition – Goods.....	Page 1
Checkout Requisition – Goods .....	Page 2
Create Requisition – Services .....	Page 2
Checkout Requisition – Services .....	Page 2
Create Punchout Requisition – Staples Only.....	Page 3
Create Punchout Requisition – Non-Staples .....	Page 3
Find My Requisition / Edit Requisition .....	Page 4
Cancel a Requisition.....	Page 4
Review and Approve a Requisition (only for Approvers) .....	Page 5

## CREATE REQUISITION GUIDELINES

**Requisition Type:** Below are Requisition types available in Workday.

- **Goods:** Select this type if you are creating requisition for physical goods.
- **Punchout:** Select this type if you are going to Supplier website (via Workday) to create Punchout Requisition.
- **Service:** Select this type if you are creating requisition related to service such as Repair, Consulting, etc.
- **General:** Select this option if the requisition will require **both** Goods and Service

**Ship-To:** The default Ship-To address is Central Services-Loading Dock. Please do not change this unless you are creating a requisition to buy Office Supplies items from Staples. For Staples Office Supplies, you must change this Ship-To address to your own office address to receive the items directly from Staples.

**Worktags:** The default worktags list **your** Cost Center, Function, and Fund.

If you are creating a requisition for a Grant or any other Project, enter the applicable financial account information by clicking **Prompt** ☰ in the Worktags box and selecting the appropriate worktags: Grant (GRT number); Agency (A number); Gift (E, R1, R2, R3 number); Internally Designated (ID number-previously R4 and R5 number); Projects (C, U number).

**Memos:** When creating Memos to Suppliers and Internal Memos, please note that the **Internal Memo** will only be visible to Howard users.

## CREATE REQUISITION - GOODS

From the **Purchases** Worklet: Under **Actions** select **Request Non-Catalog Items**.

1. Under **Requisition Type** select **Goods**.
2. Click **OK**.
3. Select **Request Goods**.



4. Populate the required fields:
  - a. Item Description: **Details of the purchased goods (as mentioned in Supplier's Price Quote)**
  - b. Supplier Item Identifier: (Vendor Item ID)
  - c. Spend Category
  - d. Supplier
  - e. Quantity
  - f. Unit Cost
  - g. Unit of Measure
  - h. Memo: You can enter your delivery address for receiver so that she can deliver your items to your office. (Not required for Staples Office supplies)



Note: If the Requisition is associated with a **Gift** or **Grant**, reference it by using the **Worktags** dropdown on the Create Requisition task.

5. Click **Add to Cart**.

## CHECKOUT REQUISITION - GOODS



Navigate to the Cart Icon located in the top right corner of the page.

6. Select **View Cart**.
7. Review the requisition items.
8. Click **Checkout**.
9. Add a **Memo to Suppliers** (in Memo to Suppliers box) if needed and an **Internal Memo** for Howard Users –approvers/buyer as needed.
10. Add an **Attachment**. You must attach a justification document to the Requisition/PO. (ex. Price Quote, Scope of Work, Memo to create requisition)
11. Click **Submit**. Your requisition is created and submitted for further processing. You can access the submitted requisition via Workday Inbox-Archive tab.

## CREATE REQUISITION - SERVICES

From the **Purchases** Worklet: Under **Actions** select **Request Non-Catalog Items**.

1. Under **Requisition Type** select **Service**.
2. Click **OK**.
3. Select **Request Services**.
4. Populate the required fields:
  - a. Description: **Enter details of the provided services**
  - b. Spend Category
  - c. Supplier
  - d. Start Date: Date when the service starts
  - e. End Date: Date when the service ends
  - f. Extended Amount: **Total Amount of the service**
  - g. Memo: Enter the delivery information in the Memo box related to this requisition line delivery.



Note: If the Requisition is associated with a **Gift** or **Grant**, reference it by using the **Worktags** dropdown in Create Requisition page.

5. Click **Add to Cart**.

## CHECKOUT REQUISITION - SERVICES

Navigate to the Cart Icon located in the top right corner of the page.

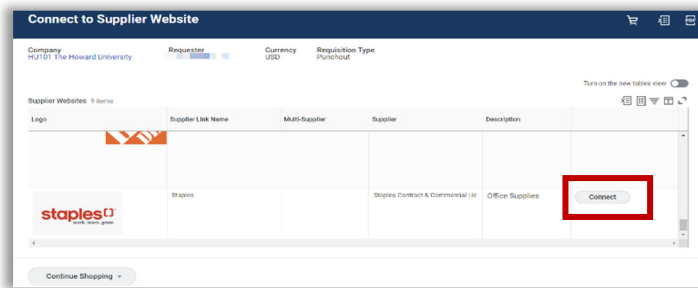
6. Select **View Cart**.
7. Review the requisition items.
8. Click **Checkout**.
9. Add a **Memo to Suppliers** (in Memo to Suppliers box) if needed and an **Internal Memo** for Howard Users –approvers/buyer as needed.
10. Add an **Attachment**. You must attach a justification document to the Requisition/PO.
11. Click **Submit**.


# Procurement: Requisition Management

## CREATE PUNCHOUT REQUISITION – STAPLES ONLY

From the **Purchases** Worklet: Under **Actions** select **Connect to Supplier Website**.

1. **Requisition Type:** select **Punchout**.
2. Click **Ship-To** prompt
  - a. Select **Addresses by Ship-To Locations**
  - b. Scroll to select your location
  - c. Click on your address. You can directly enter your department address or select appropriate address
3. Click **OK**.
4. Scroll to find **Staples**. Click **Connect**.



5. Add the requested items to your cart via the website.
6. Hover over your cart  and then click **Review cart**.

*The minimum order is \$35 pre-tax. If your order is below the minimum, a \$5.99 minimum order fee will be applied.*

7. Click **Submit Order** to return to Workday.
8. Select **Checkout** on the Workday **View Cart**.
9. Add a **Spend Category** to the line item.



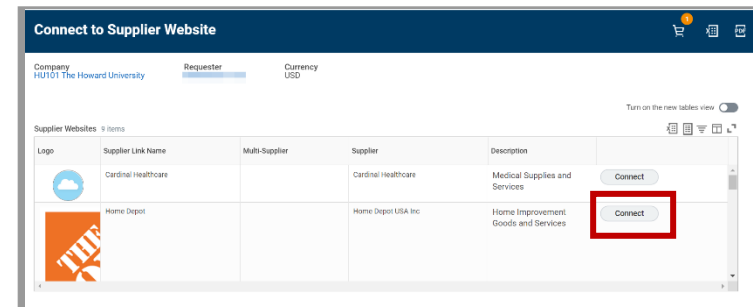
Note: If the Requisition is associated with a **Gift** or **Grant**, reference it by using the **Worktags** dropdown

10. Confirm worktags.
11. Click **Submit**.

## CREATE PUNCHOUT REQUISITION – NON-STAPLES

From the **Purchases** Worklet **Actions:** select **Connect to Supplier Website**.

1. **Requisition Type:** select **Punchout**.
2. Click **OK**.



3. Scroll to the Supplier
4. Click **Connect**.
5. Add the requested items to your cart on the supplier's site.
6. Navigate to your cart on the supplier's site.
7. Select **Checkout** on the supplier's site to return to Workday.
8. Select **Checkout** on the Workday **View Cart**.
9. Add a **Spend Category** to the line item.




Note: If the Requisition is associated with a **Gift** or **Grant**, reference it by using the **Worktags** dropdown

10. Click **Submit**.

## FIND MY REQUISITIONS / EDIT REQUISITION:

Requesters can find their requisitions by using “My Requisitions” report using **Search** or via “**Purchases**” application in View section: click **Requisitions**.)

From the **Search**: Type **My Requisitions** and navigate to the **My Requisitions** report.

1. Complete the following fields:
  - a. Enter **HU101 The Howard University**
  - b. Requisition: **Requisition Number**
  - c. Requester: **Your Name**
  - d. Document Date On or After: Enter a date before the date you created the requisition
  - e. Uncheck “Exclude Canceled”, and “Exclude Closed” checkboxes if you want to view Canceled, and/or Closed requisitions
2. Click **OK**.
3. Locate the requisition and click related actions  to the right of the magnifying glass.
4. Under **Requisition**, click **Edit**. Edit option will be available only for those requisitions which is in “Draft”, “In Progress” or in “Approved” status. If the status is “Successfully Completed” or “Denied” you cannot edit the requisition.
5. Edit requisition as needed.
6. Click **Submit**.


## CANCEL REQUISITION

Sometimes you need to cancel your requisition. Cancel any invalid requisition so that your active requisitions list has correct data.




Note: Once the requisition is canceled the cancellation cannot be reversed.

From the **Search**:

1. Type **My Requisitions** and navigate to the **My Requisitions** report.
2. Complete the following fields:
  - a. Company: **HU101 The Howard University**
  - b. Requestion: **Requisition Number**
3. Click **OK**.
4. Locate the Requisition you wish to close and click the related actions icon  to the right of the magnifying glass.
5. Under **Requisition**, click **Cancel**. *It is recommended to enter a reason for cancelling and any comment in the Comment box.*
6. Click **OK**.
7. Click **Done**.

## REVIEW AND APPROVE REQUISITION (ONLY FOR APPROVERS)

From the **Home** page:

1. Click the inbox  icon at the top right.
2. Scroll to select the requisition task awaiting your approval.

Review the requisition and select an action (Approve or Send Back or Deny) on this page.

3. Review and validate the following:
  - a. **Requisition Summary**
  - b. **Location Details**
  - c. **Memo:** Reminder - Internal memo is not visible to the supplier
  - d. **Line-item** details including cost center worktags: If the requisition is associated with a Grant, Gift or project, verify the proper worktags are listed on the requisition
  - e. **Attachments:** verify the justification document is attached
4. Click to select the appropriate choice:
  - a. **Approve** button if you want to approve the requisition
  - b. **Send Back** if you want Requester to edit or update and resubmit the requisition
  - c. **Deny** if you don't want this requisition to be processed.  
***Denied requisitions cannot be updated for resubmission.  
A new requisition must be initiated.***



**Note:** You must enter a comment with valid reason for the **Send Back** or **Deny** options.