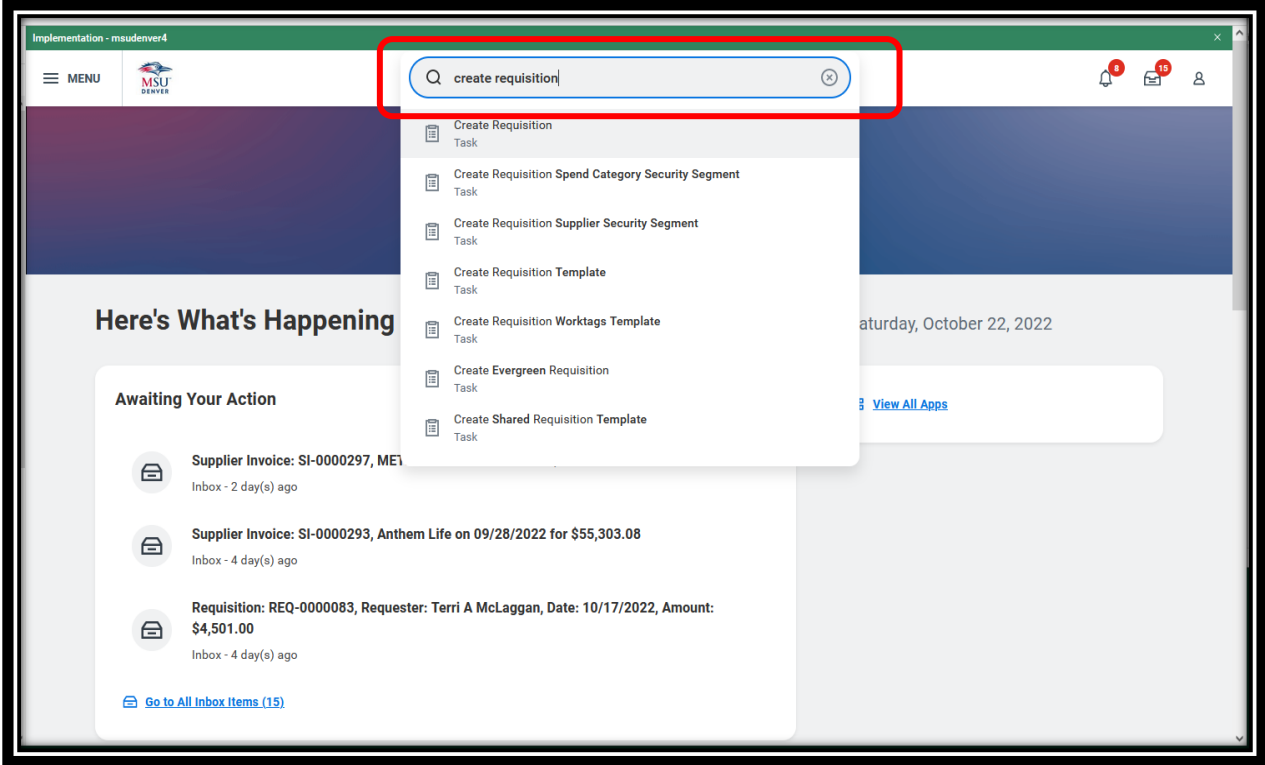
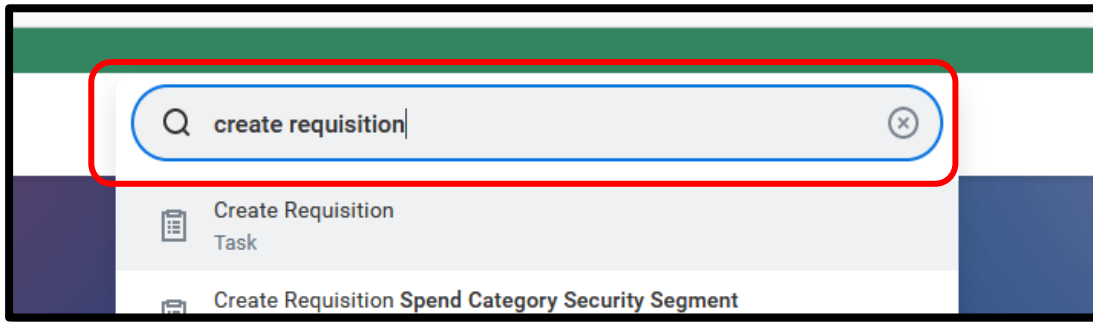


# How to Create a Requisition in Workday



**Step 1: Start with "Create Requisition" in the search bar.**

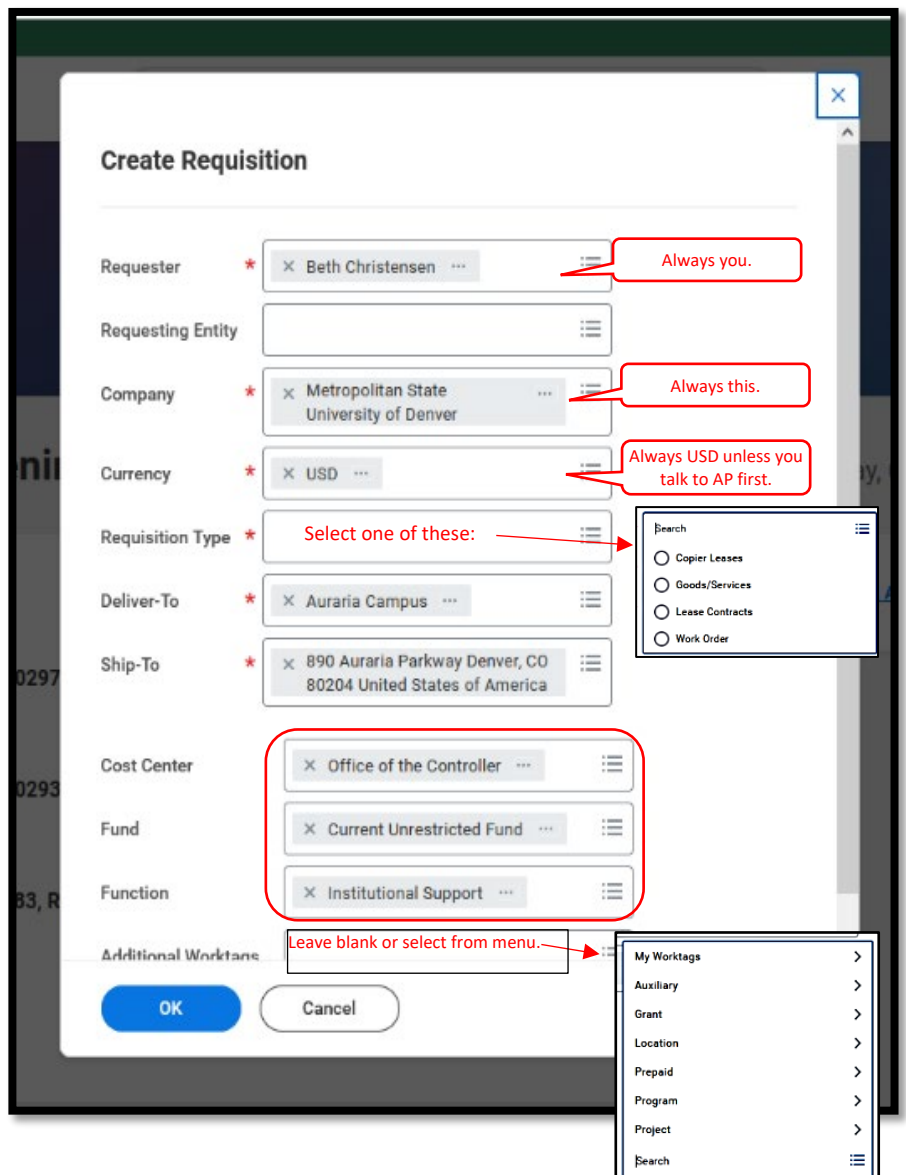


The Create Requisition prompt screen will pop up. Much of the information will be filled in by default based on your position. You can change any of these as necessary. Anything with an asterisk must be filled in here or you will not be able to move on.

Note that you can change any of these later in the process.

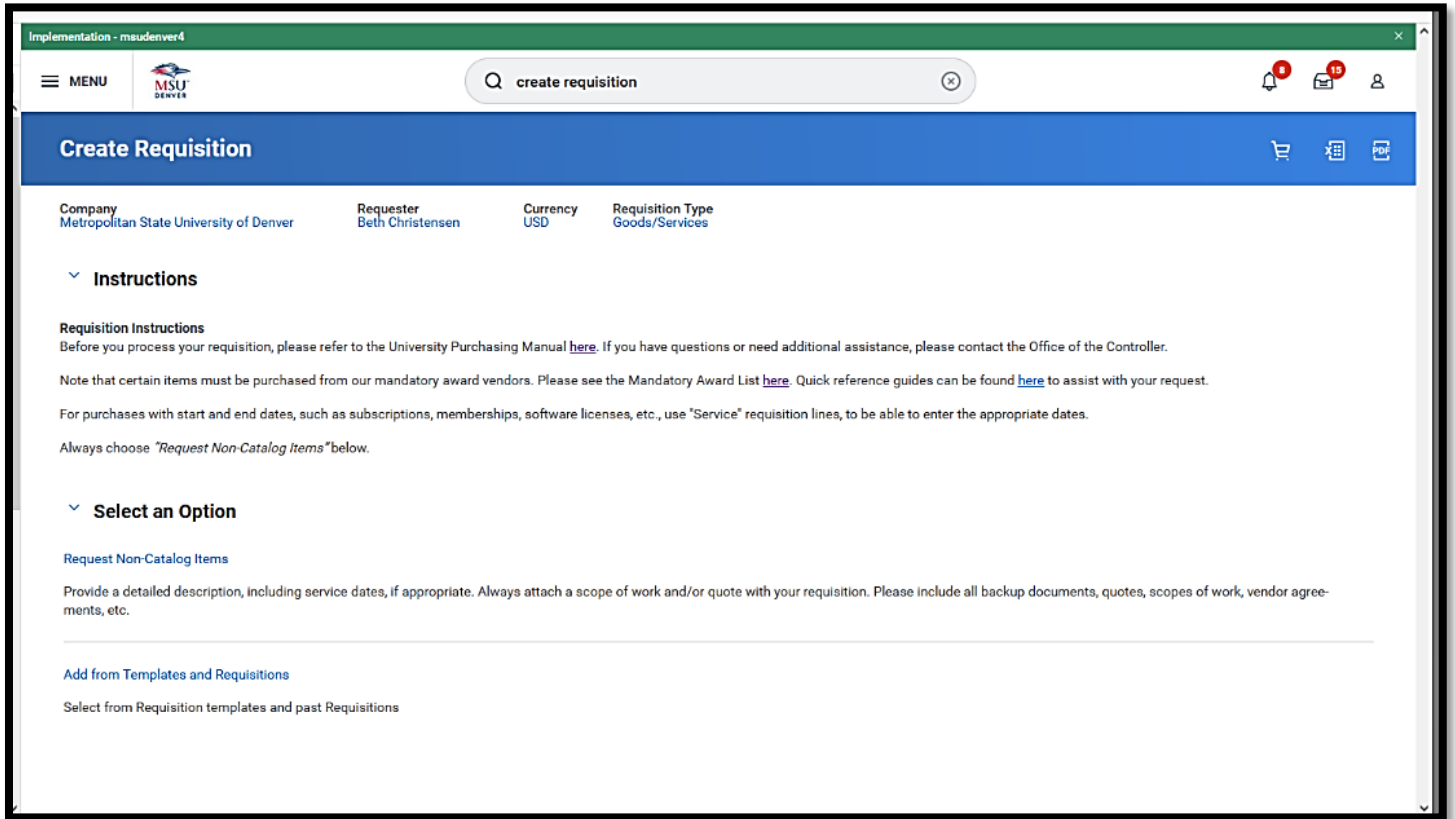
- a. Requesting entities are not currently set up.
- b. Paying in anything other than US dollars requires help from Accounts Payable.
- c. The requisition types are fairly self-explanatory. You will probably not use Work Order and rarely, if ever, Lease Contracts.
- d. Deliver to and Ship to default to campus and will default to the Receiving dock. If you are located off campus or get deliveries to your own loading dock, like Athletics, you can change this.
- e. Cost Center, Fund, and Function will default to the ones used to set up your position, which might not be the ones you use for purchasing. Change them, if necessary.
- f. Additional Worktags – If you know you need them, you can select from the menu, or you can leave this blank for now and fill it in later, if necessary.

Click on the OK button.



Now, the Create Requisition page will appear.

Read the Instructions section. It includes links to helpful resources, a reminder about mandatory awards, and additional information about certain purchases.



Always click on Request Non-Catalog Items.

Later, when we are more accustomed to the system and have more requisitions in the history, we will work on creating templates.

The Request Non-Catalog Items screen will open.

First, you have to choose between Request Goods and Request Services. There will be some different fields to populate based on which you choose; *however*, when you go to check out, you can change almost everything, if you have made a mistake. You can add services to a goods purchase and vice versa, or remove one or the other, as well. Basically, don't worry too much about which you choose, but for convenience, it's best to try to pick the right one.

# REQUEST GOODS

Adobe Acrobat Pro (32-bit)

https://impl.workday.com/msudenver4/d/task/299751676.html

Implementation - msudenver4

MENU create requisition

## Request Non-Catalog Items

Company: Metropolitan State University of Denver  
Requester: Beth Christensen  
Requisition Type: Goods/Services

Requisition Currency: USD

**Non-Catalog Request Type**

Request Goods  
 Request Service

**Goods Request Details**

Item Description \*  Provide enough detail to clearly identify what you are getting.

Supplier Item Identifier

Spend Category \*  Equivalent to "Account" in Banner, but words; searchable.

Supplier  Vendor/contractor/supplier; searchable, can be left blank.

Supplier Contract: (empty)

Quantity \*

Unit Cost

Unit of Measure \*

Extended Amount: 0.00

Memo  Anything you put here will NOT show up on the printed PO, but will be shown on the information page for the PO in Workday.

Click to add to your cart.

[Add to Cart](#) [Continue Shopping](#) [Cancel](#)

Your Cart - Click to check out.

## REQUEST SERVICES

**Request Non-Catalog Items**

Company: Metropolitan State University of Denver | Requester: Beth Christensen | Requisition Type: Goods/Services

Requisition Currency: USD

**Non-Catalog Request Type**

Request Goods  
 Request Service

**Service Request Details**

Description \*

Spend Category \*

Supplier

Supplier Contract (empty)

Start Date MM/DD/YYYY

End Date MM/DD/YYYY

Extended Amount 0.00

Memo

**Callout:** This is the difference between goods and services – Services require start and end dates and just the total amount for the services. You can add information about hourly rates, etc, in the Memo field.

**Buttons:** Add to Cart, Continue Shopping, Cancel

### **NOTES ON FILLING OUT THE REQUEST GOODS/SERVICES SCREENS:**

- In the Description box, include enough detail to be clear about what you are purchasing. If you have a quote from the supplier, you can copy the line items from there, but if they are not clear because the supplier description is very technical, you should add what it is in plain language, too. While it is possible to just put in something general, like “supplies,” that will mean AHEC Purchasing will have to go back and fill it in with the detail, which will just make the process take longer.
- If you need an open PO for the year, use the Request Services type, even if it is for goods. That way, you can enter beginning and end dates and a total amount, without needing specific items or unit prices. The end date will always be the end of the current fiscal year, and these will have to be renewed each fiscal year.
- Also use Request Services for copier leases, equipment or space leases, software licenses, subscriptions, etc – things that are based on time periods, rather than specific items.
- Supplier – The list of suppliers is searchable by typing in all or part of the supplier’s name. If the supplier you need is not in the list, you should leave this blank and add a Memo either here or in the Internal Memo field of the Checkout page identifying the supplier you want to use and the date you initiated a Supplier Request in Workday, which is the next step. See the section titled **“Suppliers”**.
- Once you have filled it out, click “Add to Cart”. The cart in the upper right will show that you’ve added something to it. When you click on Add to Cart, you will get a new blank request screen and a message that says it was added to the cart, but the message goes away quickly, so if you miss it, you might think you need to do it over. If you accidentally double up, you can take it off in the checkout screen.
- If you are buying multiple items from the same Supplier, you can continue with this screen, OR you can go to the cart and “check out”, which will bring up the following pages, where you can make changes to anything you entered here or add additional line items, split payments, etc.
- **VERY IMPORTANT:** If you are doing several purchases from different suppliers, it is easy to accidentally put multiple suppliers on one requisition. The system allows this, but we do NOT. This is why we recommend only filling out the page for the first item, then going to checkout and adding any additional items/services on that page.

# Step 2: CHECKOUT

https://impl.workday.com/msudenver4/d/task/299751650.html

**Checkout** 1 Error and 1 Alert

Company: Metropolitan State University of Denver | Requester: Beth Christensen | Requisition: new | Status: Draft | Total Amount: 3,000.00 USD

If you have questions or need assistance with filling out the requisition form, please contact us at [business\\_services@msudenver.edu](mailto:business_services@msudenver.edu)

**Shipping Address**

Deliver-To: \* Auraria Campus

Ship-To Address: 890 Auraria Parkway, Denver, CO 80204, United States of America

**Requisition Information**

Request Date: \* 12/27/2022

Currency: \* USD

Credit Card: DO NOT USE

Requisition Type: \* Goods/Services

Options are:  
• Copier Leases  
• Goods/Services  
• Leases  
• Work Orders

High Priority:

Sourcing Buyer: [Dropdown]

Submitted by: Beth Christensen

Freight Amount: 0.00

Other Charges: 0.00

Memo to Suppliers: This will show up on the PO.

Internal Memo: This will not.

**Goods** You can modify things in these tables.

Order	Image	Item	Item Description	*Spend Category	*Quantity	Unit Cost	Exten Amc
		Do not use.	Alto Saxophone	* Equipment - Non-Computer, Purchased	Quantity * 5	Unit Cost 600.00	3,000

Add/delete line items

**Goods** Scrolled right.

Deliver-To	*Ship-To Address	Ship-To Contact	Requested Delivery Date	Supplier	Supplier Item Identifier	RFQ Required	Mem
* Auraria Campus	* 890 Auraria Parkway, Denver, CO 80204, United States of America	* Beth Christensen		* Bold Org, Inc	123XYZ	<input type="checkbox"/>	St sc

**Goods** Scrolled right.

RFQ Required	Memo	*Cost Center	*Fund	*Function	Additional Worktag	Splits
<input type="checkbox"/>	Second one for screen shots	* Office of the Controller	* Current Unrestricted Fund	* Institutional Support		0

Split payment accounts

**Services** You can add services to the purchase here. It will look similar to the Goods table.

Order	Image	Item	Description	*Spend Category	Extended Amount	Date	Deliver-To
No Data							

**Attachments** Drag and drop attachments

**Activity (0)**

Type "@@" to tag someone.

You can tag someone here, who will then get a notification with your message.

**Submit** Save for Later Continue Shopping ...

## NOTES on the Checkout Page:

- Errors and Alerts – Always check to see what these are. Errors will prevent you from completing the PR. Alerts just let you know something you might have missed or should consider.
  - You will always get an alert to remind you to add attachments, because the vast majority of PR's should have some kind of backup to verify things like price, scope of work, item descriptions, vendor agreements, etc. If a PR comes through without any attachments, and we think there should be, we will send it back to you with a note asking for it, which will just delay the process.
- Credit Card – Do NOT enter your corporate card information here. It will not generate a credit card payment and is not linked to the corporate card process. All it will do is put your credit card number on the PO and send it through the email, where it is potentially unsafe.
- Sourcing Buyer – the Buyers are the AHEC Procurement staff, and the Sourcing Buyer is the one who will be issuing the PO. However, this particular field does not actually *do* anything (like send it directly to them) other than identify who that is, so unless you know for a fact who that will be, you should just leave this blank and AHEC will fill it in when they get it.
- Memo to Suppliers – What you put here will show up on the PO, but as a general memo for the whole PO, not particular to any line items. Use this for special delivery instructions or discounts to apply or things like that.
- Internal Memo – This will only show up within Workday when people are looking at the requisition. Use it for notes to yourself or others that you want to keep for posterity, like who you purchased it for or other context. You can also put messages/instructions for AHEC Procurement here, but you can also do that in the Activity field with a tag to the person, if you know who that is.
- Goods and Services Lines – You can change pretty much anything in these lines, regardless of what you might have put in on the requisition screen or what auto-populates. You can add additional lines, remove lines, and even add services lines to goods or goods lines to services.
  - We do not use the Item field. We use the spend categories to cover this information.
  - Check your Item Description again to make sure it has enough information to identify what you are purchasing. Balance info that the supplier will need with descriptions that make sense to everyone else looking at it. NOTE – there is field later in the line for entering the supplier's item/catalog number, so you don't need to put it in the Item Description.
  - Spend Category equates to what we called Accounts in Banner. It is the general category of what you are purchasing, such as "Supplies – Janitorial" or "Services – Advertising". It is searchable by typing in key words. If nothing seems appropriate, you can contact Business Services to figure out what to use.
  - Here you can change the Deliver To and Ship To locations. "Deliver To" is where it needs to go on campus, eg your office or a storage location, etc. Ship To should almost always be AHEC Receiving, unless you are off campus or have special arrangements with Receiving.
  - Supplier Contract is used when there is a master contract that you want to issue a PO against. We expect to use this for such things as multi-year software contracts, but we are still working out details. For the most part, you will not need this field.
  - Supplier Item Identifier is the supplier's item/catalog number.
  - Memo – this one is line specific, but does NOT show up on the PO. Use it for internal messages, such as who the item is for or where it's supposed to go, etc.
  - WORKTAGS –
    - Cost Center – Generally equates to Organization in Banner. Usually the department or organizational unit.
    - Fund – These are now limited to a few, including Current Unrestricted Fund, Current Restricted Fund, Auxiliary, Plant Fund, etc. Use this to identify the funding source in a general sense, then use appropriate additional worktags to identify such things as the specific grant or project.

- Function – These generally equate to Program in Banner. It includes such things as Academic Support, Institutional Support, Instruction, etc.
- Additional Worktags. Some of these have requirements to be used with particular funds or spend categories; Workday will tell you when that is the case:
  - Auxiliary – Required if you use the Auxiliary Fund to identify which auxiliary program.
  - Grant – Required if you use the Current Restricted Fund to identify which grant.
  - Location – Required for all trackable spend categories. It is the physical location of the item being purchased.
  - Prepaid – This one is more complicated than it sounds. Talk to AP before using it.
  - Program – Very roughly equates to Activity in Banner. It is used to further categorize certain expenditures when needed for reporting.
  - Project – Generally, though not solely, used for construction projects.
- Splits – This is where you can split a line into multiple payers. The number identifies how many splits there are for the line, unless there are none, in which case it says zero. Splits can be by quantity, dollar amount, or percentage. See the section titled **“To Split the Order among Multiple Worktags.”**
- Attachments – You can drag and drop attachments into the Attachments area. NOTE: if an attachment should be included with the PO, such as a quote, scope of work, or vendor agreement, etc., you must check the “External” box for each one that needs to be attached. You can also include attachments that are just for internal use, such as emails related to the purchase or previous related purchases. For those, you would NOT check the External box, but they would remain available to anyone looking it up in Workday.
- Activity – Use this to tag specific people you want to send a note to about the PR. They will get a notification in their Workday inbox. This is a good way to notify a specific buyer that you want them to see your PR or let someone who is not in the approval chain know that something has been done with it.

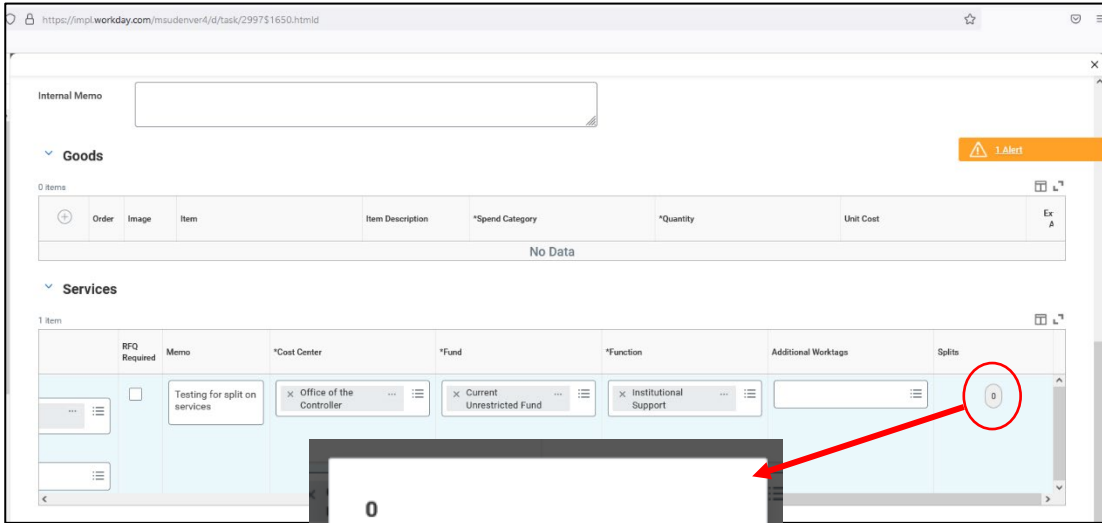
Once you are done, click “Submit” to send it through the routing process.

NOTE: If you are in the middle of a requisition and need to put it aside for some reason before completing it, click “Save for Later” to put it in draft mode. You can come back to it later by using My Requisitions. See the section titled **“Finding a Requisition.”**



## TO SPLIT THE ORDER AMONG MULTIPLE WORKTAGS

At the far right of the Goods or Services table is a column titled "Splits" with an oval under it that has a number inside. That number is how many splits that *line* has. If you want to split a whole PO that has several line items, you need to do it for each line item.



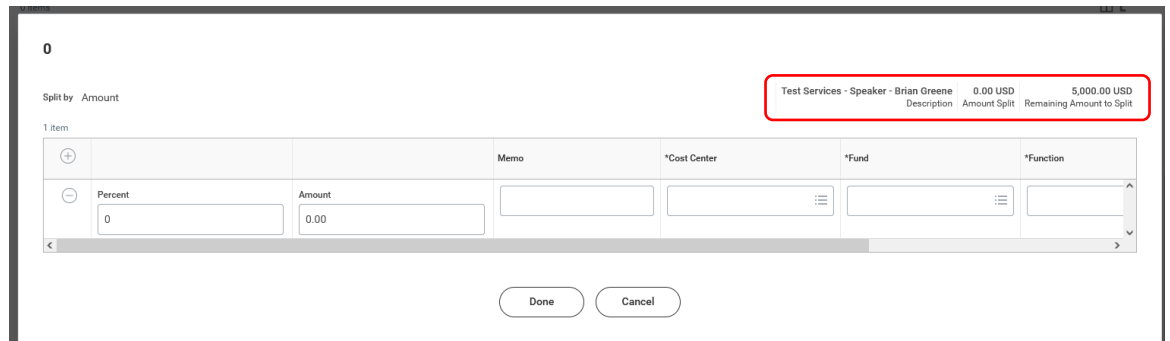
Click the oval like a button and a popup window opens.

For **Goods**, it will ask whether you want to split the line by quantity or amount. Select which one you want.

A new window will open where you will enter the information about the split.

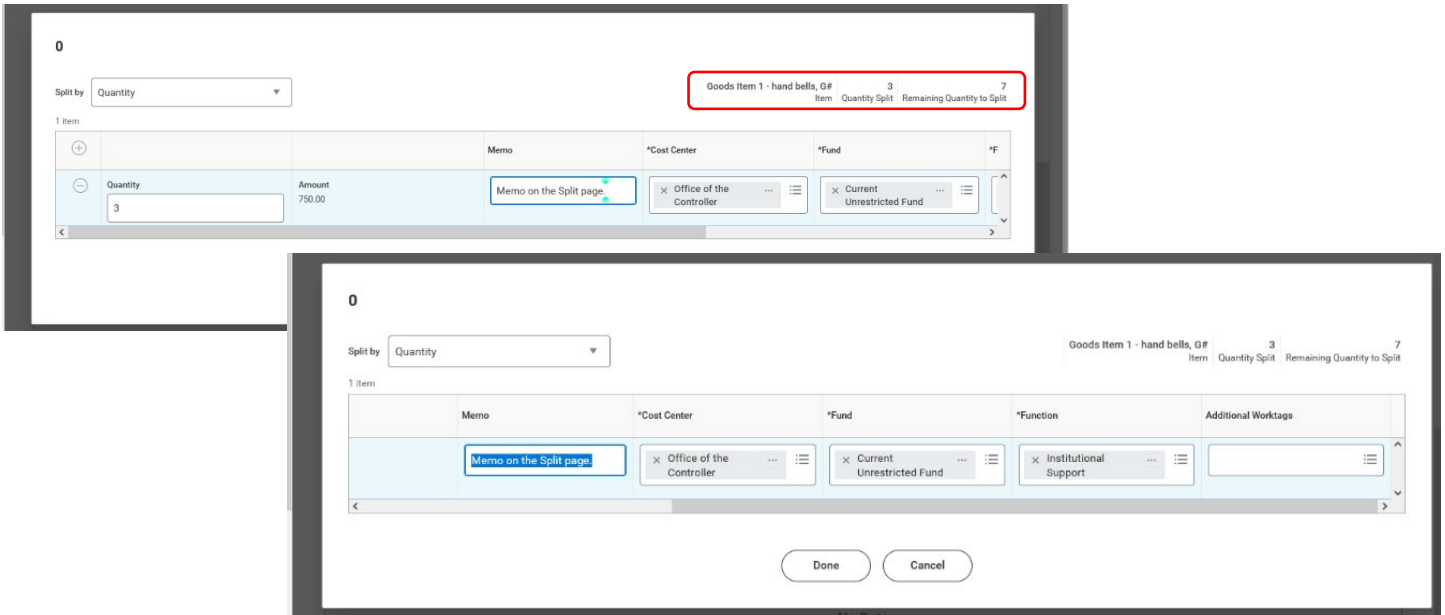
For **Services**, it will just open the split window.

Either way, the new window will open with a blank line. This can seem confusing, but as soon as you put in your first division, it will auto-populate the rest of the line with what is in the original line item.

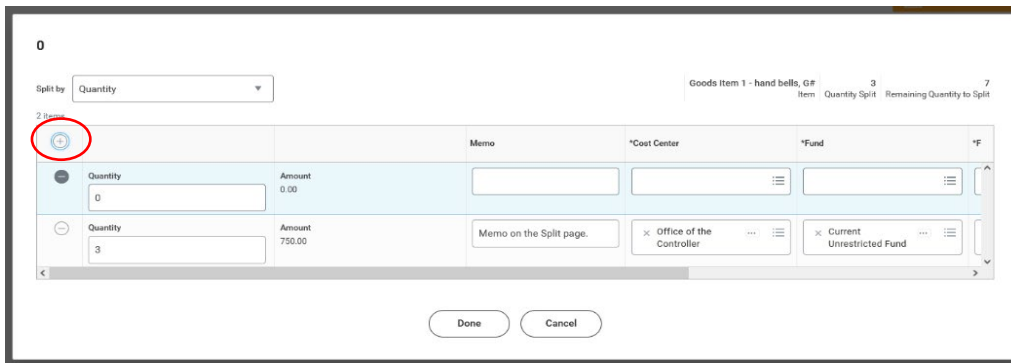


NOTE: In the upper right hand corner, you will see information from the PR line as it relates to how you decided to split the line. If you chose Amount, it will show you the total dollar amount available. Once you add a split, it will update to the remaining amount. If you chose Quantity, it will show how many things are available to split and will update to the remaining amount when you enter the first split line.

As soon as you enter your first split quantity/amount/percentage, the line populates with the information you already entered in the PR line and the upper right corner updates to what is left to be split. Scroll to the right to see the applicable worktags.



Click the plus sign in the header row to add a new line for the split.  
 NOTE: The new line will appear *above* the original line.

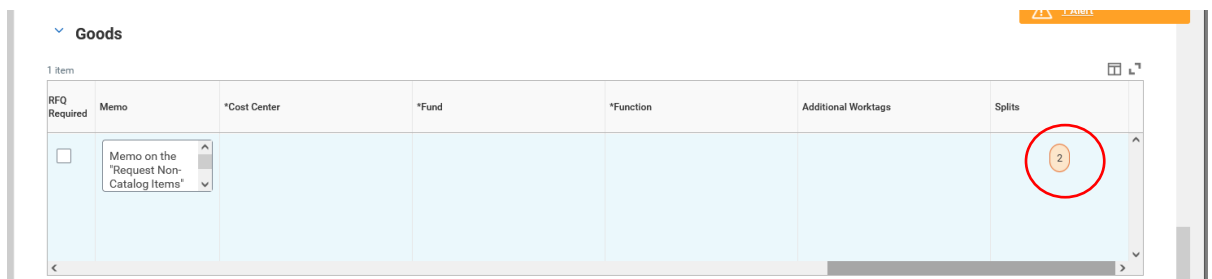


Fill in the split quantity/amount/percentage for the new line and the worktag information. You can add memos to each split line, if you want to leave an internal note. They will not show up on the PO.

You can continue adding lines until the split is complete. You can keep adding lines as needed.

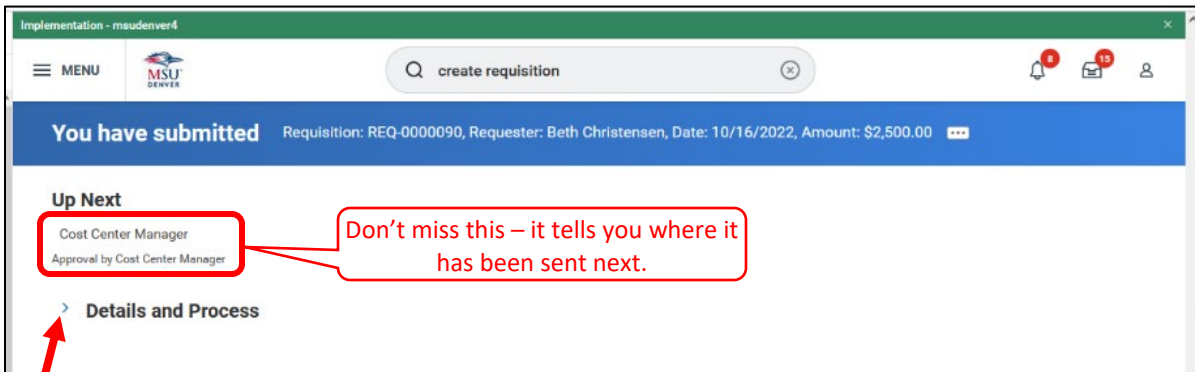
Click "Done" when finished.

When a line is split, the original worktags will show blank on the main Requisition page, and you can click on the split number to see the divisions.

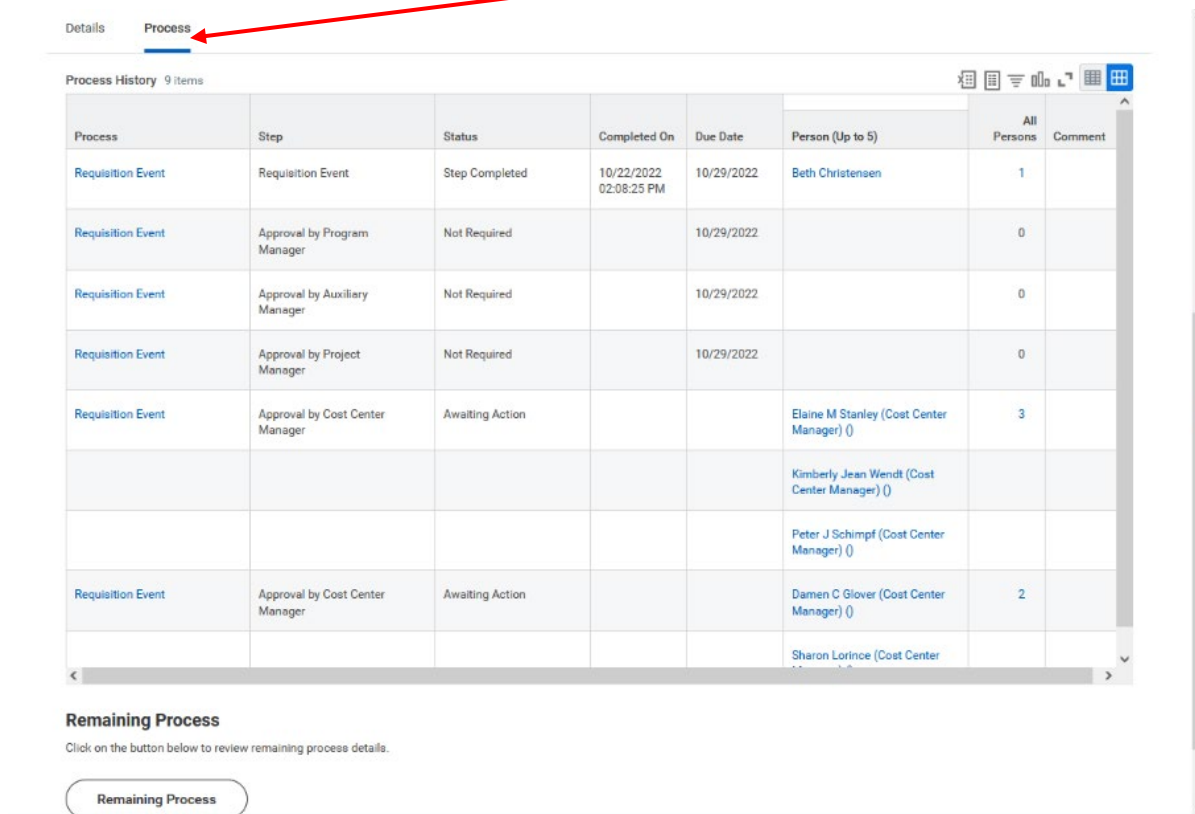


### Step 3: After Submission

Once you click Submit, this screen will appear, showing the requisition number and who is next to review and approve it.



Click the arrow by Details and Process and then the Process tab to see the route it is taking.



This shows you all possible steps, not just the ones that apply to this purchase, but it also says if some of them are skipped because they are not required. The end of the list is where it is at that moment.

NOTE: Most of the approvers, up to and including the Buyers, can either make changes to a requisition or send it back to the initiator with a note to make changes and resubmit it.

There's no X to close this window. You have to use the browser's back arrow or else just go to your inbox.