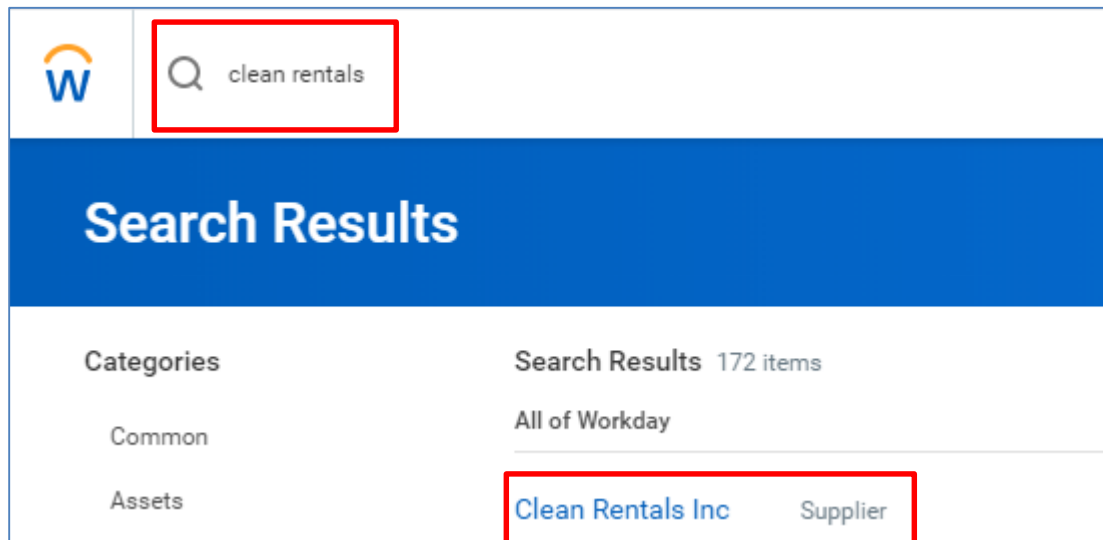


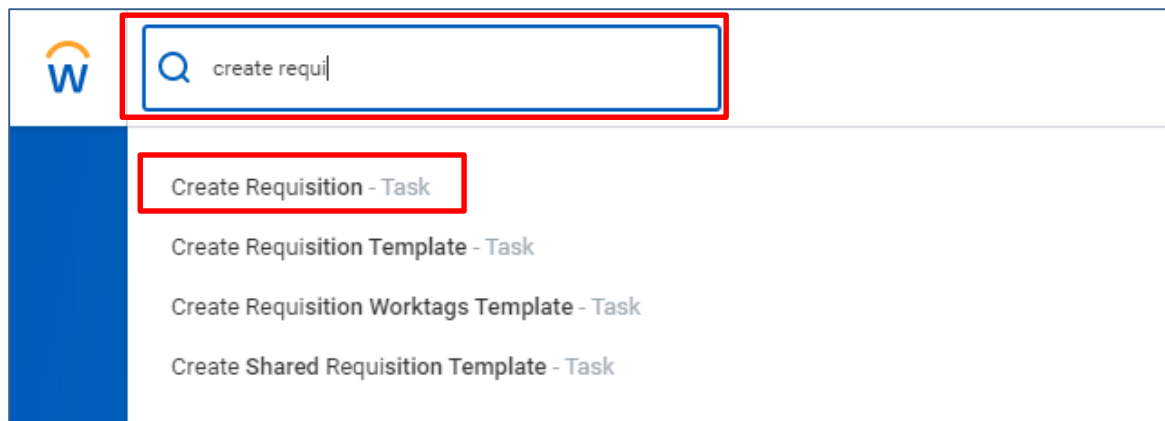
## Submitting a Requisition

Before creating a requisition, you need to check if the supplier already exists in Workday. To do this, type the name of the supplier in the search bar in the top left-hand corner of the screen.

If the supplier you searched for appears with the word “supplier” to the right of their name, they have been set up, and you can proceed with the steps below. If the supplier does not exist, you will need to set them up using the [Wellesley College Supplier Registration Form](#).



1. In the Workday search bar, type “Create Requisition” and select this option from the pull down menu.



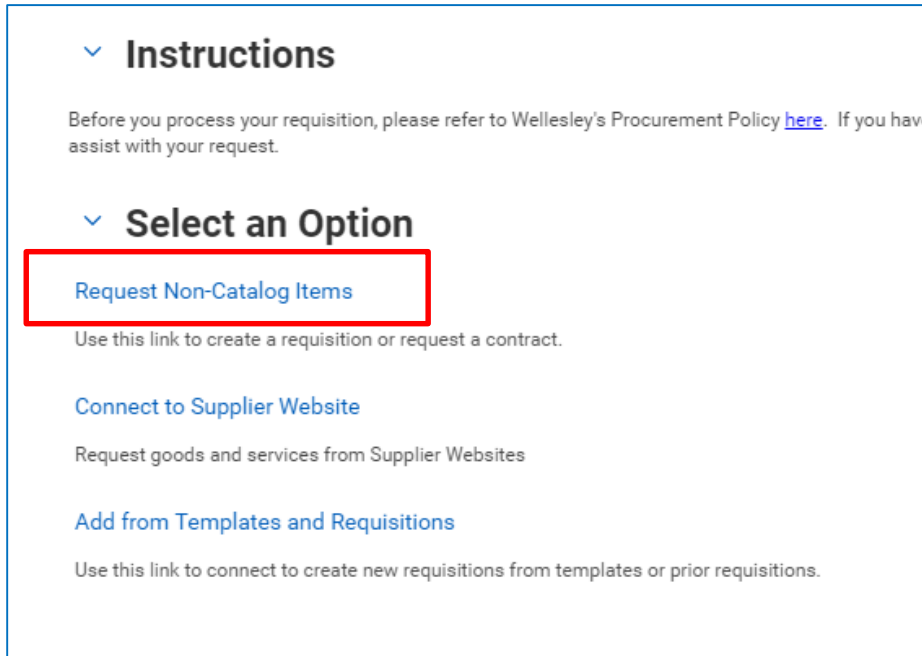
2. The “Default Deliver-To” address should **ALWAYS REMAIN** Wellesley College.
  - Change the “Ship-To” field to your building location by typing into the field, or using the 3 bars on the right-hand side to search.
  - Click into the “Requisition Type” field and select the appropriate type of requisition. (*Blanket and Standard are the most common*)
  - Change the default Cost Center if necessary and add any worktags if applicable.

The screenshot shows the 'Create Requisition' form with the following fields and values:

- Company: \* X Wellesley College ...
- Requester: \* X O'Brien, Kerri ...
- Currency: \* X USD ...
- Deliver-To: X Wellesley College ...
- Ship-To: \* X 106 Central St. Wellesley, MA 02481 United States of America ...
- Requisition Type: X Blanket Purchase Order Requisition ...
- Gift: (empty)
- Grant: (empty)
- Cost Center: X CC2360 Purchasing ...
- Fund: X FD100 Operating ...
- Division: X FIN Finance and Administration ...
- Program: X PG150 Institutional Support ...
- Additional Worktags: (empty)

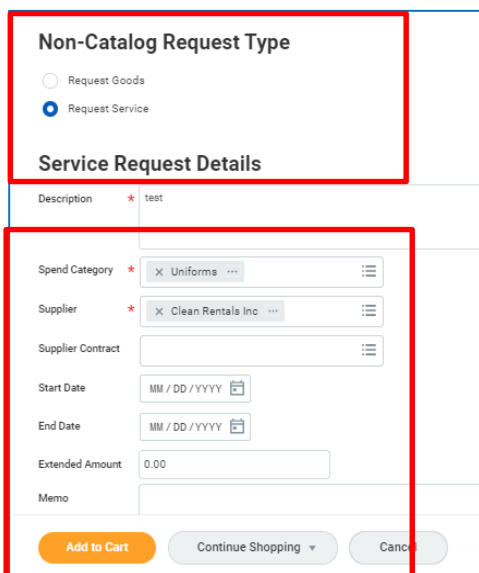
At the bottom, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.

3. On the next screen, select “Request Non-Catalog Items” or select “Add from Templates and Requisitions.”

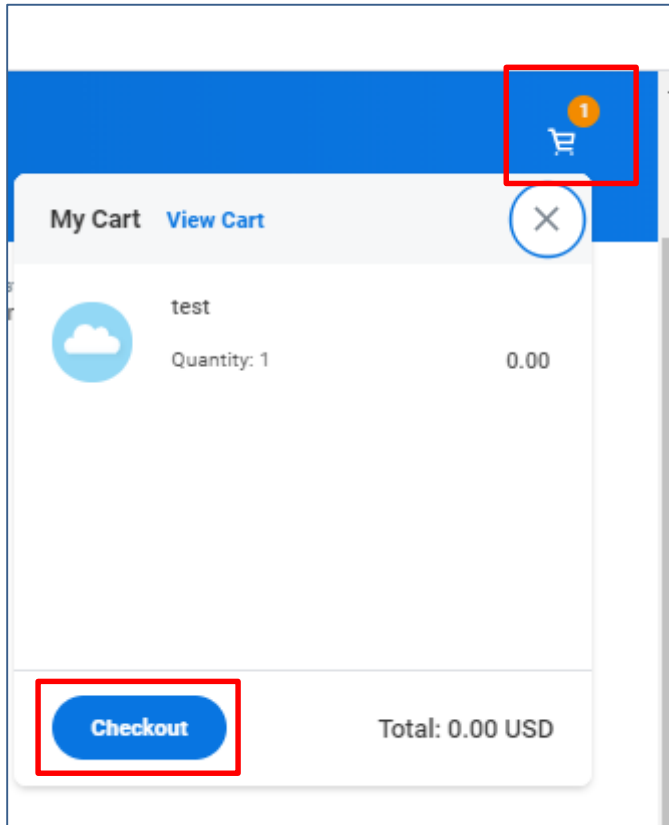


4. On the next screen:

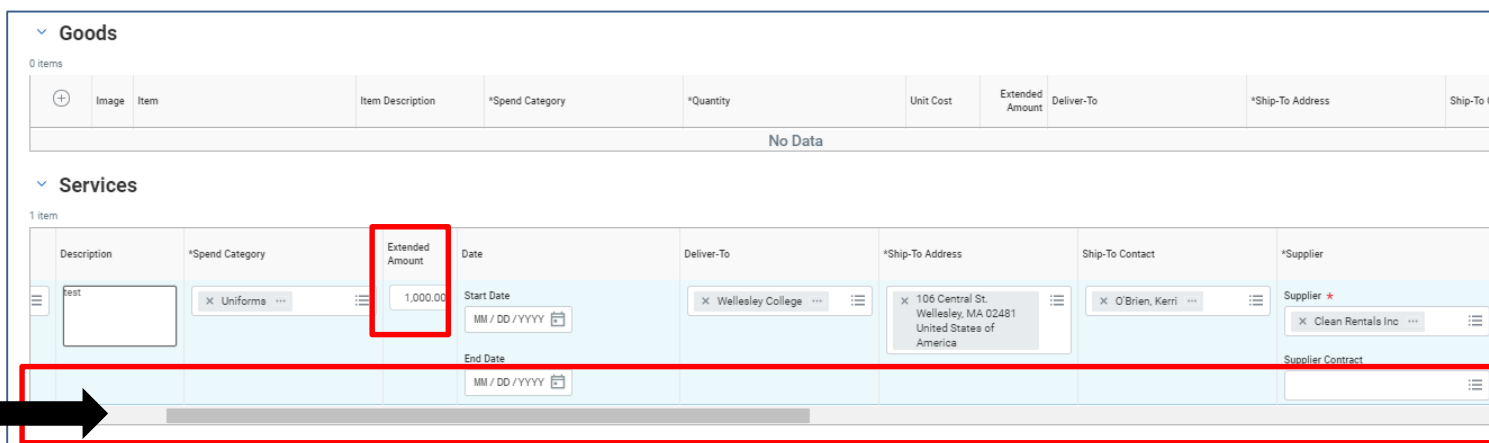
- Under “Non-Catalog Request Type”, select either “Request Goods” or “Request Services.” (*In this example, we will select “Request Services”*). **PLEASE NOTE: IF YOU ANTICIPATE YOU WILL RECEIVE MORE THAN ONE INVOICE AGAINST YOUR PURCHASE ORDER, YOU MUST SELECT “REQUEST SERVICE”.**
- Under “Service Request Details”, type a description in the “Item Description” box.
- Select the appropriate “Spend Category” from the drop-down list.
- Click into the “supplier” field, and search for the appropriate supplier.
- Enter the amount into the “Extended Amount” Field.
- If there are no additional lines in your requisition, click “Add to Cart” at the bottom.



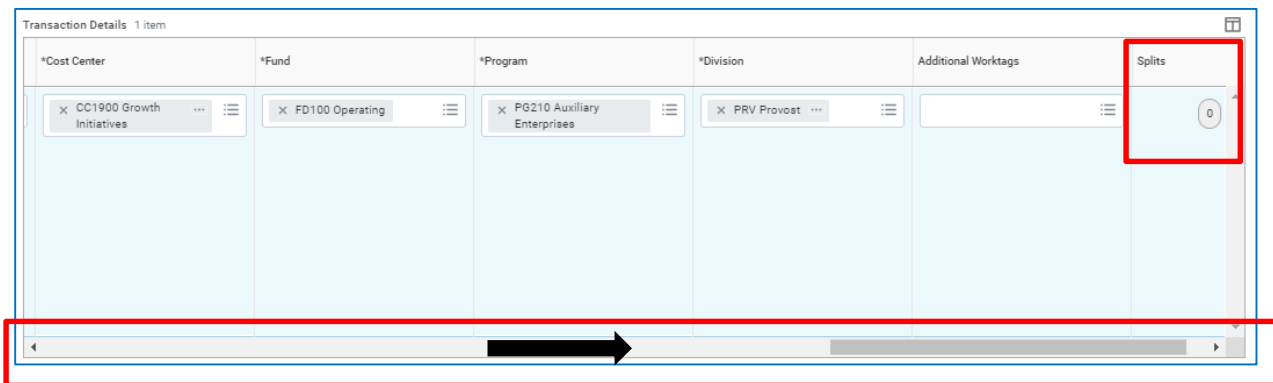
5. Click on the shopping cart in the upper right-hand corner of the screen, and click "Checkout."



6. In the “Checkout” screen, look under each section “to ensure the information entered is correct.
  - Scroll over to the right (using the bar at the bottom of the box) and ensure the appropriate Gift, Grant, or Cost Center is entered. *(you entered this information in Step 2, but can change it if necessary)*



- In some instances, you may need to split a charge between two different funding sources. To do this, scroll over to the far right of the transaction detail information and click on the zero below “splits”.
- You will then be prompted to select how to split the transaction, by “amount” or by “quantity”. We recommend selecting by amount.



- After clicking the zero and splitting by “amount”, a new window will open. First, you need to add an additional line by using the plus sign in the top left corner of the split screen.
- Once you have the number of lines you need, you can begin entering the dollar amount per line. *(the system will calculate the remaining balance for you in the top right-hand corner)*
- When you have finished entering the amounts, scroll over to the right. If necessary, change the default cost center to the appropriate Gift, Grant, or Cost Center you are splitting the transaction between.

- When you have finished entering the amounts and funding information for the split, click “done” at the bottom and you will return to the verification screen.

The screenshot shows a mobile application interface for entering a split. At the top, there is a dropdown menu labeled "Split by" set to "Amount". To the right, a summary shows "(empty) Item", "23.01 USD Amount Split", and "0.00 USD Remaining Amount to Split". Below this, a table lists "2 items". The first item is highlighted with a red box and contains a plus sign icon. The second item is also highlighted with a red box and contains a minus sign icon, a "Percent" field with the value "50", and an "Amount" field with the value "11.51". The third item is highlighted with a red box and contains a minus sign icon, a "Percent" field with the value "49.9782703", and an "Amount" field with the value "11.50". At the bottom of the form, there are two buttons: "Done" and "Cancel". The "Done" button is circled in red. A right arrow icon is also circled in red.


7. After carefully reviewing and editing, upload any necessary documents in attachments. **All requisition greater than or equal to \$10,000 will require an attached Bid Form (Refer to the Purchasing Website for the forms).** If you do not upload the required documents, you will receive an error message when you attempt to submit your request and be prompted to revise your requisition.

When you are finished, click “submit” at the bottom of the page. A message will appear saying you have submitted your requisition, and where it is going next for approval.

The screenshot shows a mobile application interface for adding services and attachments. At the top, there is a section titled "Services" with a dropdown arrow and "0 items" below it. Below this is a table with columns: "Image", "Item", "Description", and "\*Spend C". Below the table, there is a section titled "Attachments" with a right arrow. At the bottom of the form, there are four buttons: "Submit", "Save for Later", "Continue Shopping", and a three-dot menu icon. The "Submit" button is highlighted with a red box.

**You have submitted**  
Requisition: RQ-0002037, Requester: O'Brien, Kerri, Date: 03/06/2020, Amount: \$1,000.00 [Actions](#)

**Up Next**

 Dolan, Tina M  
Review Requisition  
Due Date 03/07/2020

> **Details and Process**

8. After the Cost Center Manager approves the requisition, it will be routed to the Purchasing Team. The Purchasing Team will create and issue the Purchase Order. You will receive a notification in your Workday Inbox like the one below:

**Purchase Order: PO-0000785, Supplier: WB Mason, Date: 08/20/2018, Amount: \$5,000.00**

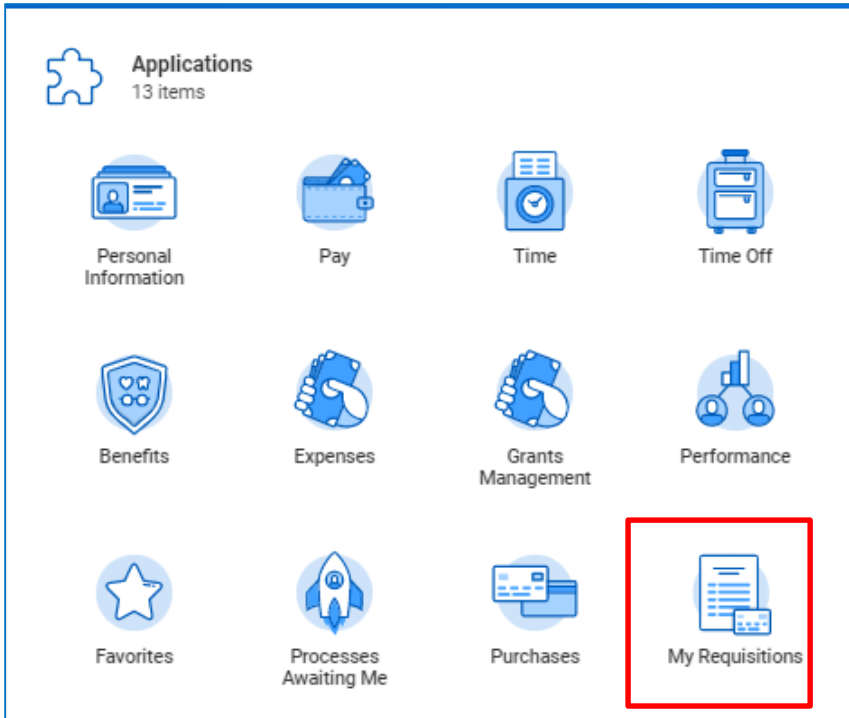
26 minute(s) ago

The following direct purchase order has been approved: PO-0000785

Details [Purchase Order: PO-0000785, Supplier: WB Mason, Date: 08/20/2018, Amount: \\$5,000.00](#)

If for some reason, you need to change or cancel the Requisition before the Cost Center Manager approves it, please follow the steps below:

- Under “Applications”, select “My Requisitions.”



- On the next screen, hover your mouse to the right of the RQ number and click the orange “Twinkie.” A sub-menu will appear. Under “Actions”, hover your mouse over the word “requisition” and click edit.
- Please note, once a requisition has been approved and a PO has been issued by Purchasing, the requisitioner can no longer make any changes. All changes must be requested by email and sent to Joe Gibree for a PO change order.

