HOW TO CREATE A PURCHASE REQUISITION

A purchase requisition is needed to communicate requested items or services to a designated purchasing representative(s). Connect to Workday from University's homepage and login with your credentials.

From **search bar** enter *Create Requisition*, then select the **Create Requisition** task.

1. The **Company, Requester, Currency, Deliver To, and Ship to** will auto populate, but can be changed utilizing the related actions drop box. **Note:** The requester should be the person entering the requisition (not necessarily the Department Head).
2. Check the Cost Center, and Worktags for accuracy. Utilize related actions to select Gift, Grant, Program or Project if necessary. Related worktags will automatically populate. *Note: if this is a grant related purchase, select **Additional Worktags, Grant Treatment, and select if Equipment is > or < $5,000**.*
3. Click **OK**.
4. On the Instructions page select **Request Non-Catalog Items**.
5. Based on the selection of Non-Catalog Items, select **Request Goods** or **Request Service**.
6. All items with an * asterisk indicate required fields. Complete the **Item Description, Spend Category, Quantity** (for goods only)**, Unit of Measure, and Fill in Memo.** (Please see the Guideline for Submission section of the Purchasing Office's web page for proper specifications needed in the Item Description field.) Note: If a supplier is known, utilize the related actions drop box to select. You can easily search by typing in supplier and pressing enter. If supplier cannot be found, or if it is a new supplier, contact your University purchasing department for guidance.
7. Click **Add to Cart**.
8. To add additional items, follow steps 5-7.
9. When complete, click on shopping cart  from upper right-hand corner.
10. Review Cart and select **Checkout** when all line items are included.
11. Add requisition Information as needed. Adjustment can be made for Grant, Gift, Program, or Project if applicable. Split funding can be completed on this step. Review all lines for accuracy.
12. Add Attachments as necessary by Procurement guidelines.
13. Click **Submit. Cancel** ends the process.
14. View Details and Process and click **Done.**

VIEW AN EXISTING PURCHASE REQUISITION

1. From the Search Bar type *My Requisitions*.
2. Fill in one or more fields from My Requisition page.
3. Click **OK**.
4. Select desired requisition.
5. From this page you can view Goods & Services Lines, Process History, or Balances.
6. Or you can click **Edit Requisition.**