

## Creating Requisitions in Workday 2020R1

The new release of Workday (2020R1, implemented March 9, 2020) includes updates to the Requisition User Interface, streamlining the requisition process for end users. Some of the screens that users are used to seeing will look different, even though they contain the same information as they did prior the March 9 release. The changes are reflected below, along with notes and highlighted areas of importance.

- !  Steps marked with the “New” icon, , indicate interface updates.



Use the steps below to create a requisition.

1. Type “Create REQ” in the search bar and press enter.

2. Select task

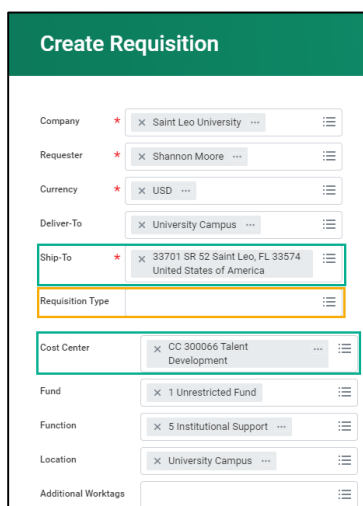
Create Requisition



Page level help is now available when creating requisitions. To use this feature, click the **question mark**,  , located on the right side of the page, then click  next to the field you need help with.



“Ship-To”, “Requisition Type” and “Cost Center” details now display on the “Create Requisition” page.



Create Requisition	
Company	✕ Saint Leo University ...
Requester	✕ Shannon Moore ...
Currency	✕ USD ...
Deliver-To	✕ University Campus ...
Ship-To	✕ 33701 SR 52 Saint Leo, FL 33574 United States of America
Requisition Type	
Cost Center	✕ CC 300066 Talent Development
Fund	✕ 1 Unrestricted Fund
Function	✕ 5 Institutional Support ...
Location	✕ University Campus ...
Additional Worktags	

3. Verify “Ship-To” details.
4. “Requisition type” can be left blank.
5. “Cost Center” details default from your profile, but this information can be updated.

(Continued)

6. Click  to continue.

7. Select:

- “Non-Catalog Request Type” for all requisitions *except* Office Depot; or
- “Connect to Supplier Website” for Office Depot requisitions.

8. Select Goods or Service “Non-Catalog Request Type”.



**Goods** are tangible products or physical items for delivery or pickup, e.g., office supplies, computers, furniture, etc.

**Services** are non-tangible expenses, e.g., hotel stays, catering, memberships, guest speakers, etc. **Dates are required in 2 separate sections of the requisition for ALL Service requisitions.**

9. The **Item Description** is a required field.



- **Item descriptions should be clear and specific and detailed to prevent the requisition from being returned to you.** Do NOT write “supplies” or “item number 5436tyh,” or “Invoice #445892,” as the only description.



- **The item description will be reviewed by the approver and by the check signer. If they cannot clearly determine what they are approving, they will send the requisition back to you which will delay your order.**


10. Select the appropriate **Spend Category**.

11. Enter the **Supplier** company name in the supplier field.



- Although the **Supplier** field does not have an asterisk, it is required.

12. Enter the appropriate **Quantity**, **Unit Cost**, and **Unit of Measure**.

13. “Memo” located at the bottom of the first page is for **your notes only**.  **Do not list the item description in this field. Information listed in this field does not extend to Purchase Orders**

14. After entering line item data, click



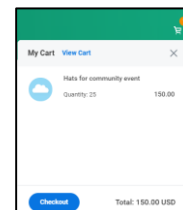


**NOTE: Additional line items can be added by repeating steps 8-14.**



15.

Click the **Cart** icon located at the top right side of the page



16. Click  to continue to checkout.

(Continued)



17. The **checkout page** options have **changed** for ease of use. The data is now visible on a single page to make reviewing and editing quick and easy.

- **Requisition type** = blank.
  - **Do not check “High Priority”** as this feature is not currently not being utilized
  - **Sourcing Buyer** = blank
  - **Memo to Suppliers section** should **include** the **contact name** and **email address** of **supplier** receiving the PO.
- !
- Always **include** the **word Quote** or **Invoice** before the **number**, e.g., “Quote #123” or “Invoice #689.”




**NOTE:** This information ensures the supplier references the correct quote on the PO.



**NOTE: ALL POs default for supplier delivery.** If you need to **pick up**, please **note this** in **Memo to Supplier**.

- **Internal Memo** is used for **special instructions** for **Procurement**. This **information** is **internal only**.



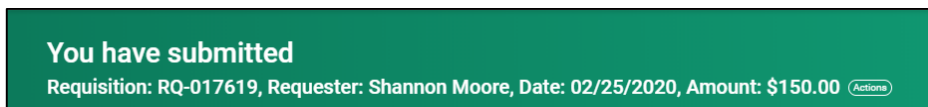
**NOTE:** Additional line items can be added by clicking the **plus sign icon**, , in the **Goods/Services** section.

18. **Attachments** should include a scanned copy of the Quote or Invoice, or whatever documents the supplier provided.



- If a contract applies, please also attach:
    - the **signed** contract (signed and completed by **all** parties involved); and
    - the corresponding contract review form signed by our Legal Department.
- Accounting and Finance can only accept a legally executable contract and, therefore, **cannot—and will not—accept contracts** that are **not signed by all parties** involved.

19. After clicking submit, the Requisition number will be shown at the top of the page.



20. Click  to complete the process.