11_Sourcing Requisition

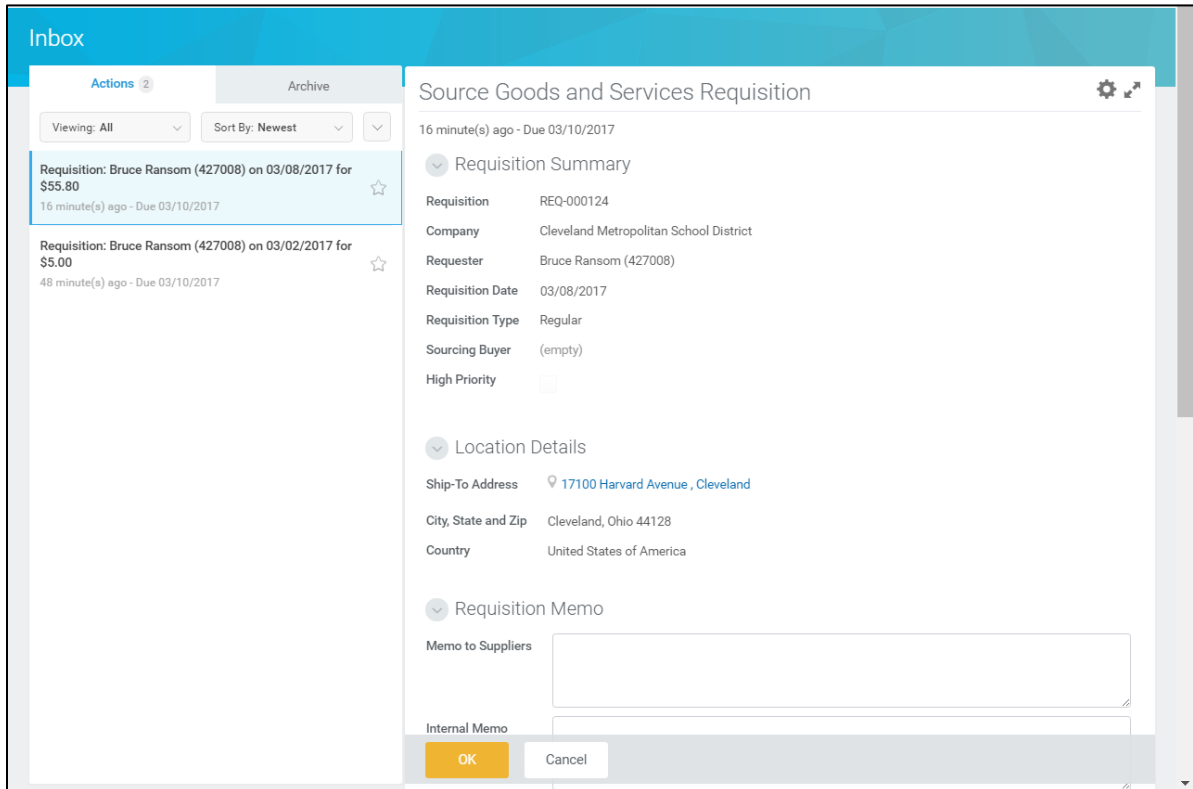|	
Purpose:	The purpose of this task is to assign a source of supply to a submitted non-catalog requisition.
How to Access:	Open your Workday Inbox and look for items in the **Actions** tab that begin with the word "Requisition", with a title of **Source Goods and Services Requisition**.
Audience:	Buyers
Helpful Hints:	• Only the Non-Catalog requisitions will ever need to be sourced, as all other requisition types have a confirmed/approved supplier. • Be sure to check your inbox frequently to ensure you process open actions in a timely manner. • Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.
Procedure:	Complete the following steps to add a source of supply to a requisition.

Inbox

1. Select the required non-catalog requisition item to source.

Note: For the purpose of this work instruction, the required item is selected.

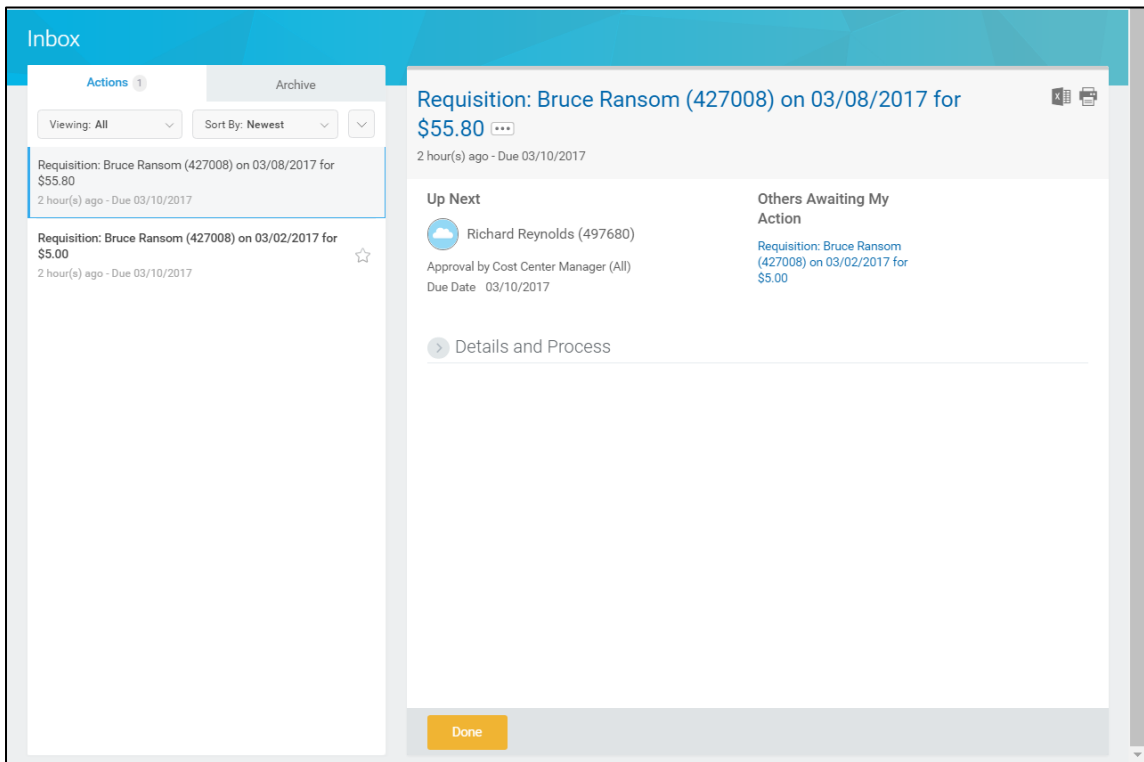2. As required, review and/or complete the following fields for each line item:

   Note: Pay particular attention to the **Supplier** field.

Field Name	Required / Optional	Description
Requester	Required	Identifies the initiator of the requisition.
Requisition Date	Required	Identifies the creation date of the requisition.
Requisition Type	Required	Identifies how the requisition will be processed. Options include: • Board Authorizing • Board Awarding • Regular
Ship-To Address	Required	Identifies where to deliver the ordered items.
Memo to Suppliers	Optional	Any notes or information to communicate to the vendor/supplier about the order.
Internal Memo	Optional	Any notes or information to communicate to the buyers, approver, or anyone who access the requisition.
Item Description	Required	Identifies the materials to procure.
Spend Category	Required	Identifies the type of material being procured.
Due Date	Optional	Identifies the requested date for delivery.
Requested Delivery Date	Required	Identifies when the requester requires the materials to be delivered.
Requested	Required	Identifies the quantity being ordered.
To Source	Required	Identifies the number of items requiring sourcing.
Remaining	Required	Identifies the number of items to be sourced.
Unit of Measure (UOM)	Required	Identifies how the items is sold.
Unit Cost	Required	Identifies the cost by unit. *Note:* At times it may be necessary to update this field after receiving a quote from the supplier.
Extended Amount	Required	Identifies the total cost for all units ordered.
Supplier	<u>Required</u>	Identify the supplier to fill the order. **Note:** If you do not know the specific supplier, be sure to use the Search functionality to locate the required supplier.
Supplier Contract	Required	Identifies if there is an applicable contract for the items to procure.
Fund	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.

Field Name	Required / Optional	Description
Cost Center	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Function	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Program	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Additional Worktags	Optional	Used when creating a requisition being paid by a Grant, Gifts, or Projects.
Location	Optional	Identifies the building's name where the procured item is to be delivered.

3. Click **Ok** after confirming all required information is accurate and complete for each line item.
   Note: Clicking **Cancel** at this point does not cancel the requisition, it just stops the sourcing of the requisition.

Inbox - Results

4. Review the **Up Next** section to confirm the next step in the process.

Result:

You have successfully sourced the non-catalog requisition.

Note: For additional information on this requisition, click to the left of **Details and Process** and review the available details.