

## 02\_Create Requisition – Search Catalog

**Purpose:** The purpose of this task is to create a requisition using an online catalog.

**How to Access:** Open the **Purchases** worklet and click **Search Catalog**.

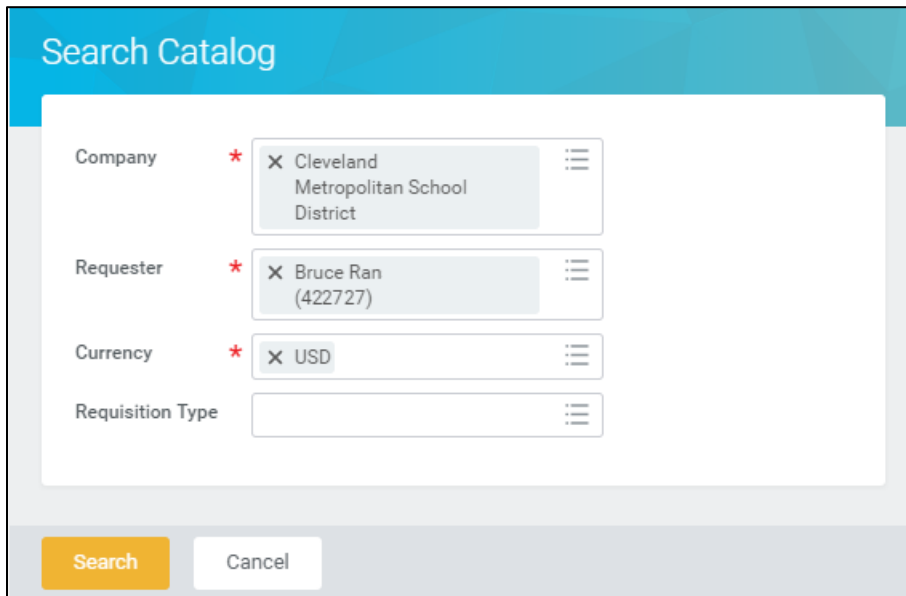
**Audience:** All roles

**Helpful Hints:**

- Be sure to keep in mind that pricing and spend categories are assigned in a catalog and should not be changed.
- 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 create a requisition by searching a catalog for required items.

### Search Catalog



**Note:** If this screen does not display, go to [Step 3](#).

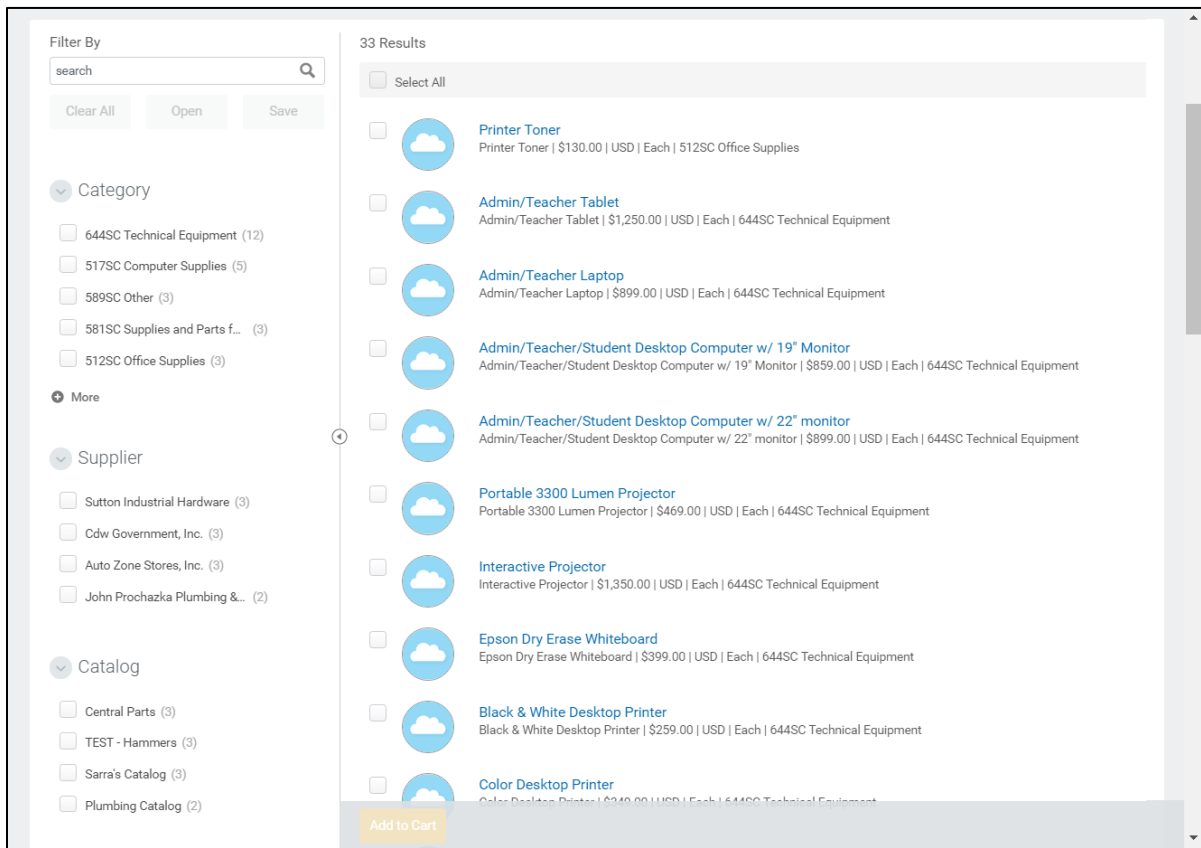
1. As required, review, update, and/or complete the following fields:

Field Name	Required / Optional	Description
Company	<u>Do Not Change</u>	Defaults to Cleveland Metropolitan School District.
Requester	Required	Identifies the employee.

Field Name	Required / Optional	Description
<b>Currency</b>	<u>Do Not Change</u>	Indicates the type of currency.
<b>Requisition Type</b>	Required	Identifies how the requisition will be processed. Options include:

2. Click **Search**.

### Search Catalog - Selection




The screenshot shows a search results page with the following elements:

- Filter By:** Search bar with 'search' text, 'Clear All', 'Open', and 'Save' buttons.
- Category:**
  - 644SC Technical Equipment (12)
  - 517SC Computer Supplies (5)
  - 589SC Other (3)
  - 581SC Supplies and Parts f... (3)
  - 512SC Office Supplies (3)
  - More**
- Supplier:**
  - Sutton Industrial Hardware (3)
  - Cdw Government, Inc. (3)
  - Auto Zone Stores, Inc. (3)
  - John Prochazka Plumbing &... (2)
- Catalog:**
  - Central Parts (3)
  - TEST - Hammers (3)
  - Sarra's Catalog (3)
  - Plumbing Catalog (2)
- 33 Results:**
  - Printer Toner**  
Printer Toner | \$130.00 | USD | Each | 512SC Office Supplies
  - Admin/Teacher Tablet**  
Admin/Teacher Tablet | \$1,250.00 | USD | Each | 644SC Technical Equipment
  - Admin/Teacher Laptop**  
Admin/Teacher Laptop | \$899.00 | USD | Each | 644SC Technical Equipment
  - Admin/Teacher/Student Desktop Computer w/ 19" Monitor**  
Admin/Teacher/Student Desktop Computer w/ 19" Monitor | \$859.00 | USD | Each | 644SC Technical Equipment
  - Admin/Teacher/Student Desktop Computer w/ 22" monitor**  
Admin/Teacher/Student Desktop Computer w/ 22" monitor | \$899.00 | USD | Each | 644SC Technical Equipment
  - Portable 3300 Lumen Projector**  
Portable 3300 Lumen Projector | \$469.00 | USD | Each | 644SC Technical Equipment
  - Interactive Projector**  
Interactive Projector | \$1,350.00 | USD | Each | 644SC Technical Equipment
  - Epson Dry Erase Whiteboard**  
Epson Dry Erase Whiteboard | \$399.00 | USD | Each | 644SC Technical Equipment
  - Black & White Desktop Printer**  
Black & White Desktop Printer | \$259.00 | USD | Each | 644SC Technical Equipment
  - Color Desktop Printer**  
Color Desktop Printer | \$249.00 | USD | Each | 644SC Technical Equipment
- Add to Cart** button at the bottom of the results list.

**Note:** There are multiple ways to search for the required items.

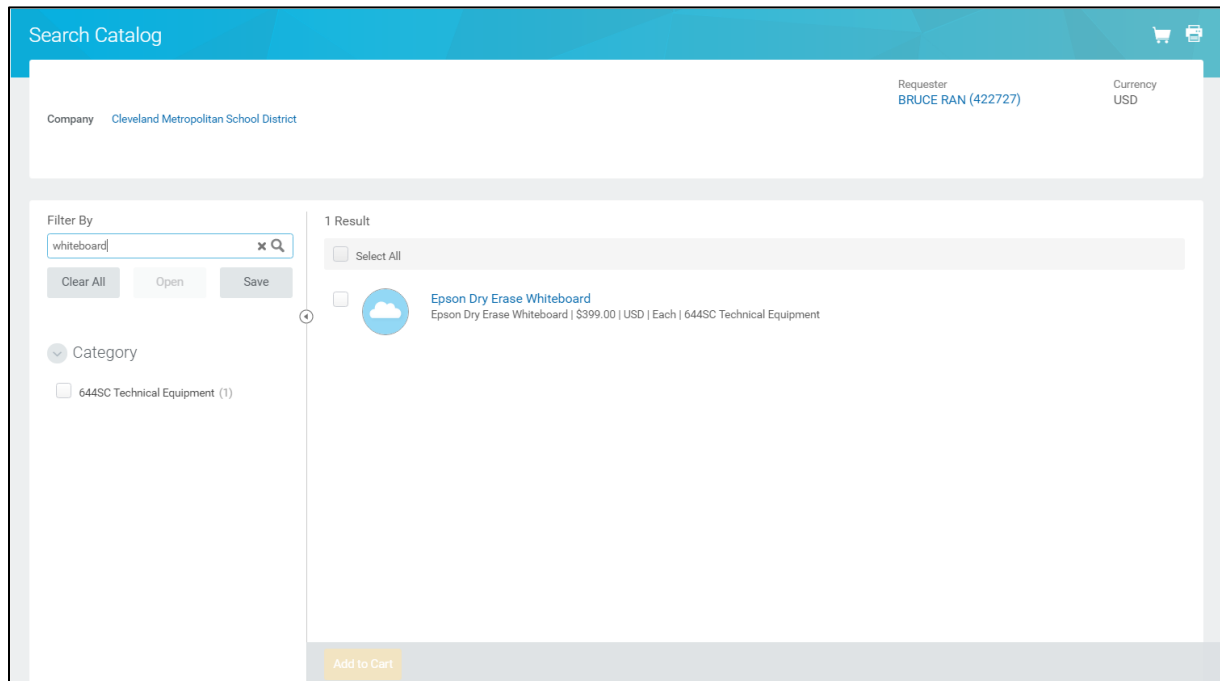
3. As required, complete one or more of the following:

If you want to...	Then...	Go To
Search for an item by name,	Enter the name of the item in the <b>search</b> field.	Step <a href="#">4</a>
Search by <b>Category</b> ,	Click <input type="checkbox"/> to the left of the required Category.	Step <a href="#">10</a>
Search by <b>Supplier</b> ,	Click <input type="checkbox"/> to the left of the required Supplier.	Step <a href="#">15</a>

If you want to...	Then...	Go To
Search by <b>Catalog</b> ,	Click <input type="checkbox"/> to the left of the required Catalog.	Step <a href="#">20</a>
Check out,	Click  in top right of the screen.	Step <a href="#">25</a>

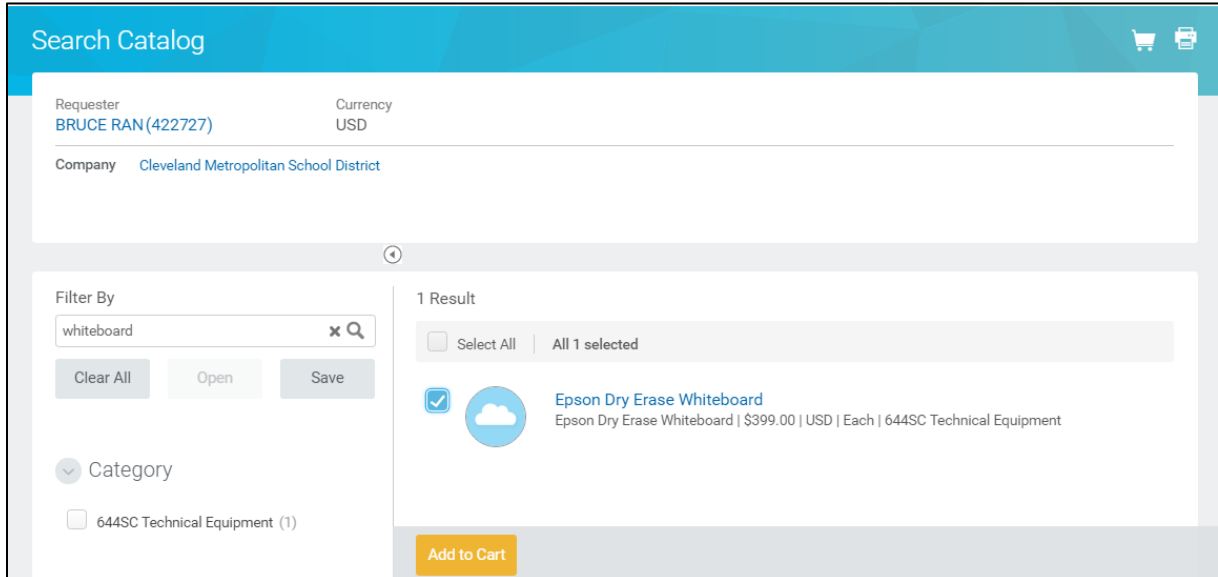
- Press **Enter** to execute the search, and go to the *Search Catalog – Results* screen.

### Search Catalog - Results



- Review the search results.
- Click  to the left of the required item in the **Results** section to select it.  
**Note:** If this is not the item you require, return to [Step 3](#).


### Search Catalog - Select



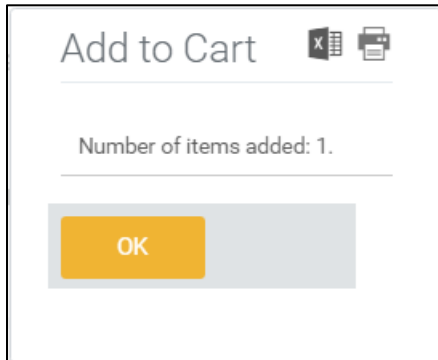
The screenshot shows the 'Search Catalog' interface. At the top, there is a header with 'Search Catalog' and icons for a shopping cart and a printer. Below the header, there is a form with the following fields:

- Requester: BRUCE RAN (422727)
- Currency: USD
- Company: Cleveland Metropolitan School District

Below the form, there is a 'Filter By' section with a search box containing 'whiteboard' and buttons for 'Clear All', 'Open', and 'Save'. There is also a 'Category' section with a dropdown menu and a checkbox for '644SC Technical Equipment (1)'. On the right side, there is a '1 Result' section with a 'Select All' checkbox and 'All 1 selected' text. Below this, there is a single result for 'Epson Dry Erase Whiteboard' with a price of \$399.00 and a unit of 'Each'. An 'Add to Cart' button is located at the bottom right of the result.

7. Click  to add the item to the cart.

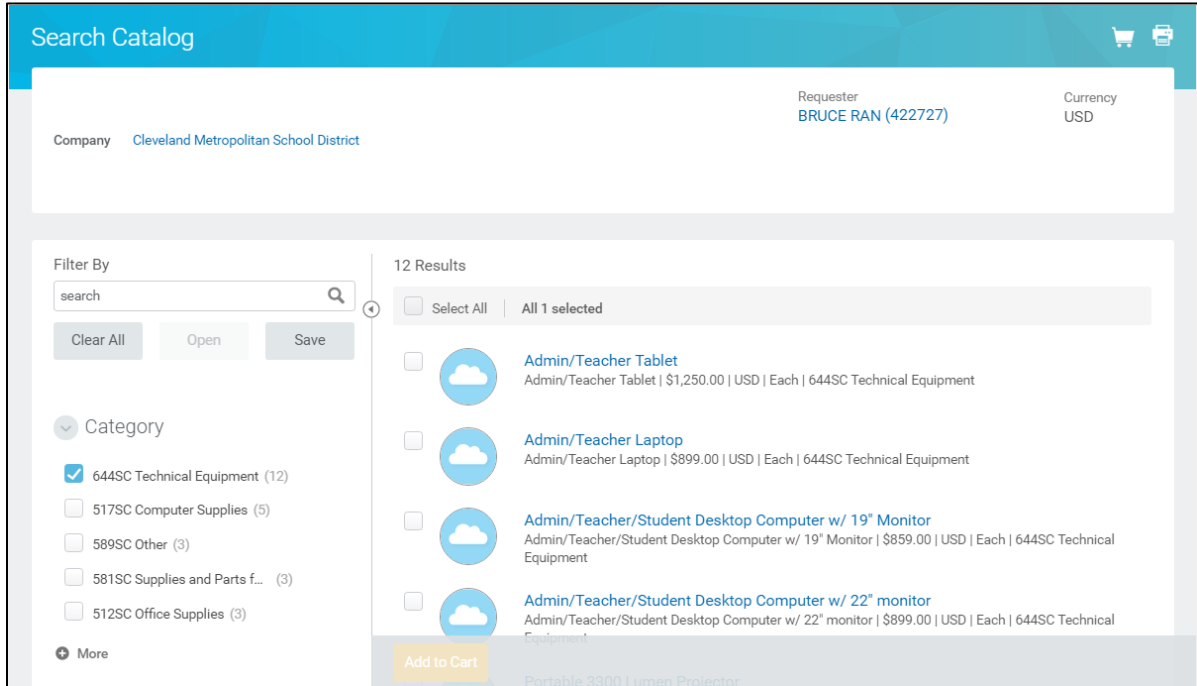
### Cart Confirmation



The screenshot shows a 'Cart Confirmation' dialog box. It has a title 'Add to Cart' and icons for a shopping cart and a printer. Below the title, there is a line of text that reads 'Number of items added: 1.'. At the bottom of the dialog box, there is a large orange 'OK' button.

8. Click **OK** to acknowledge the number of items added to the cart.
9. Return to [Step 3](#).

## Search Catalog - Category



The screenshot shows the 'Search Catalog' interface. At the top, the header includes the title 'Search Catalog' and icons for a shopping cart and printer. Below the header, the 'Company' is listed as 'Cleveland Metropolitan School District'. The 'Requester' is 'BRUCE RAN (422727)' and the 'Currency' is 'USD'. A 'Filter By' section on the left contains a search bar with the text 'search', 'Clear All', 'Open', and 'Save' buttons. Under the 'Category' dropdown, '644SC Technical Equipment (12)' is selected. The main results area shows '12 Results' with a 'Select All' checkbox and 'All 1 selected' text. Four items are listed, each with a checkbox and an 'Add to Cart' button:

- Admin/Teacher Tablet | \$1,250.00 | USD | Each | 644SC Technical Equipment
- Admin/Teacher Laptop | \$899.00 | USD | Each | 644SC Technical Equipment
- Admin/Teacher/Student Desktop Computer w/ 19" Monitor | \$859.00 | USD | Each | 644SC Technical Equipment
- Admin/Teacher/Student Desktop Computer w/ 22" monitor | \$899.00 | USD | Each | 644SC Technical Equipment

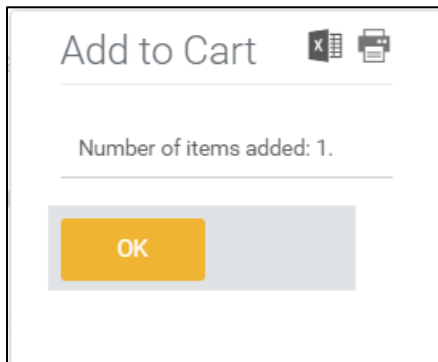
10. Review the displayed results.

11. Click  to the left of the required item(s) from the **Results** section of the screen.

**Note:** If this is not the item you require, return to [Step 3](#).

12. Click  to add the item(s) to the cart.

### Cart Confirmation

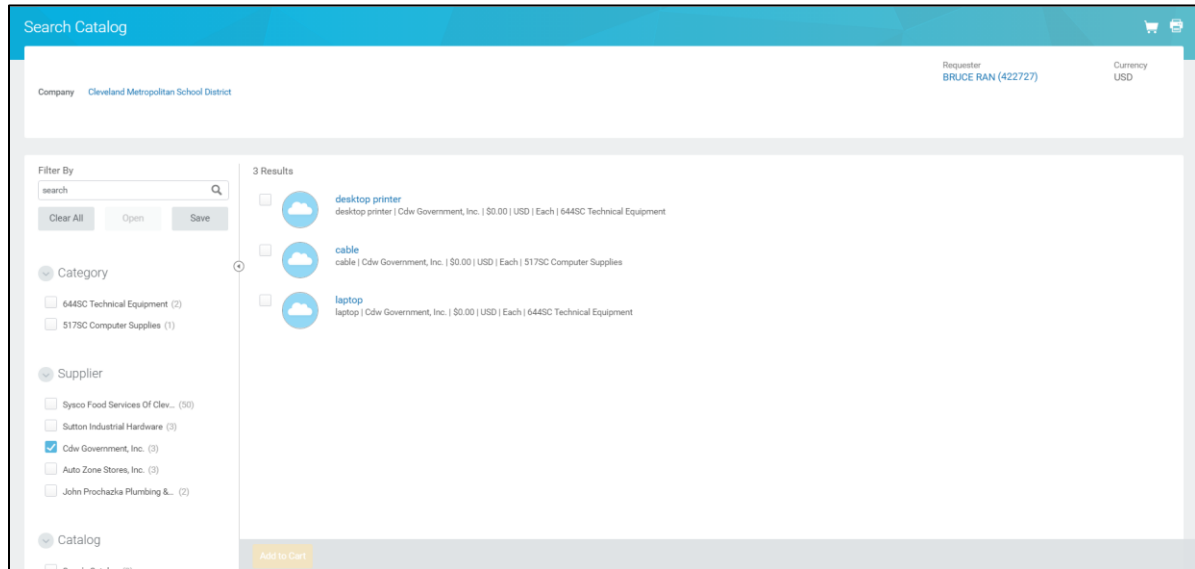


The screenshot shows a confirmation dialog box titled 'Add to Cart' with a shopping cart icon. Below the title, it states 'Number of items added: 1.' At the bottom, there is a yellow 'OK' button and a greyed-out 'Cancel' button.

13. Click **OK** to acknowledge the number of items in the cart.

14. Return to [Step 3](#).

## Search Catalog – Supplier



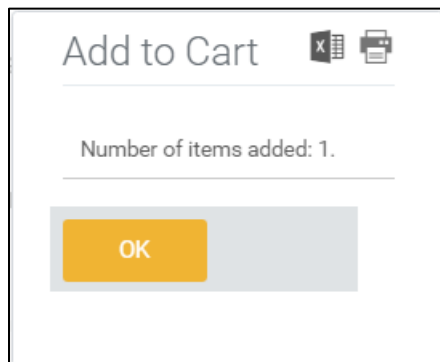
15. Review the displayed results.

16. Click  to the left of the required item(s) from the **Results** section of the screen.

**Note:** If this is not the item you require, return to [Step 3](#).

17. Click **Add to Cart** to add the item(s) to the cart.

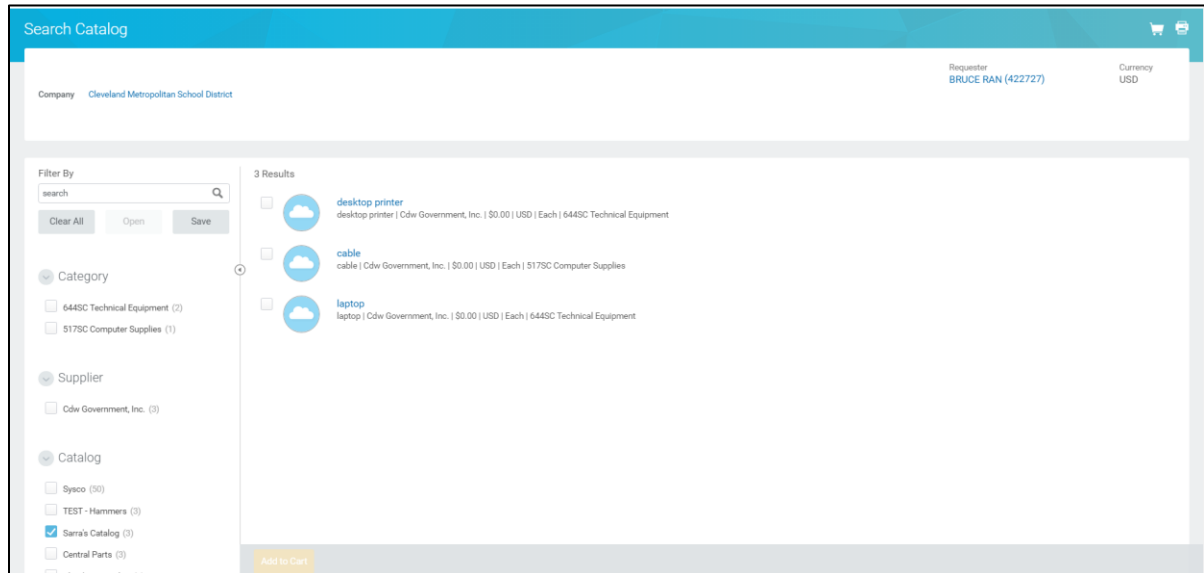
## Cart Confirmation



18. Click **OK** to acknowledge the number of items in the cart.

19. Return to [Step 3](#).

## Search Catalog – Catalog



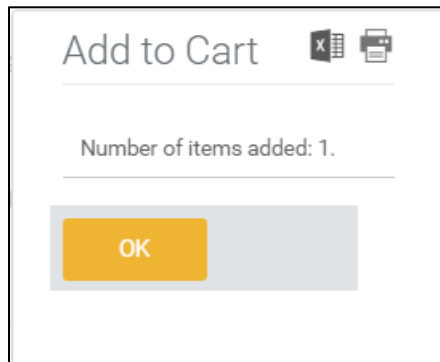
20. Review the displayed results.

21. Click  to the left of the required item(s) from the **Results** section of the screen.

**Note:** If this is not the item you require, return to [Step 3](#).

22. Click  to add the item(s) to the cart.

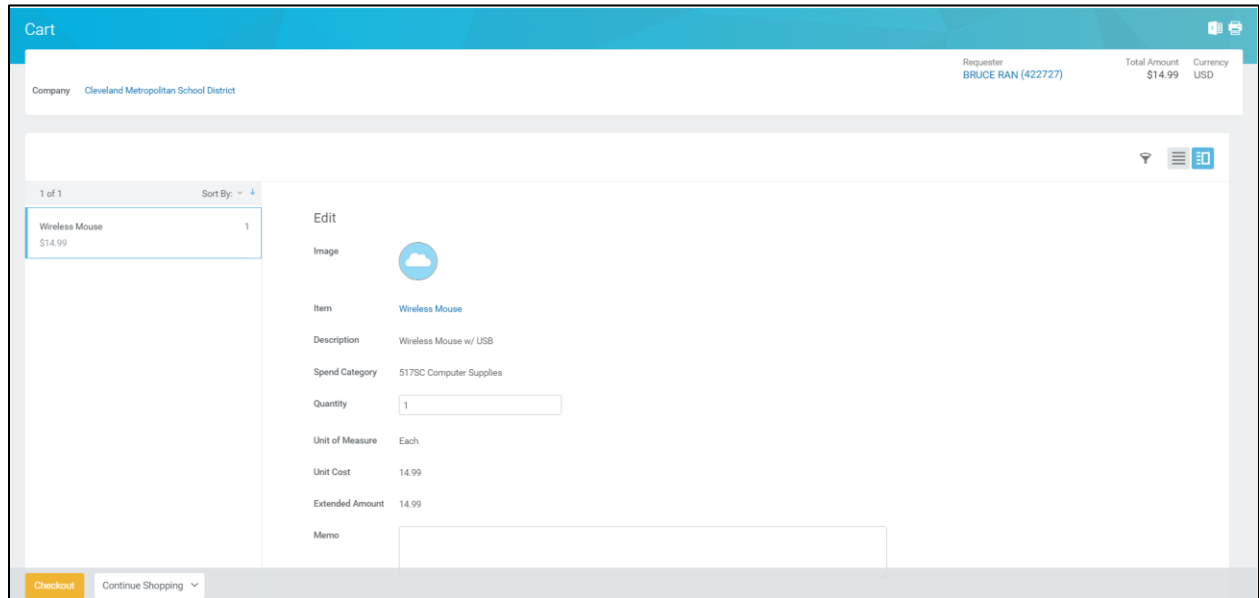
## Cart Confirmation



23. Click **OK** to acknowledge the number of items in the cart.

24. Return to [Step 3](#).

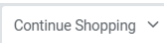
Cart




25. Review the information, to confirm what you are ordering is correct.

26. As required, review, update, and/or complete the following fields:

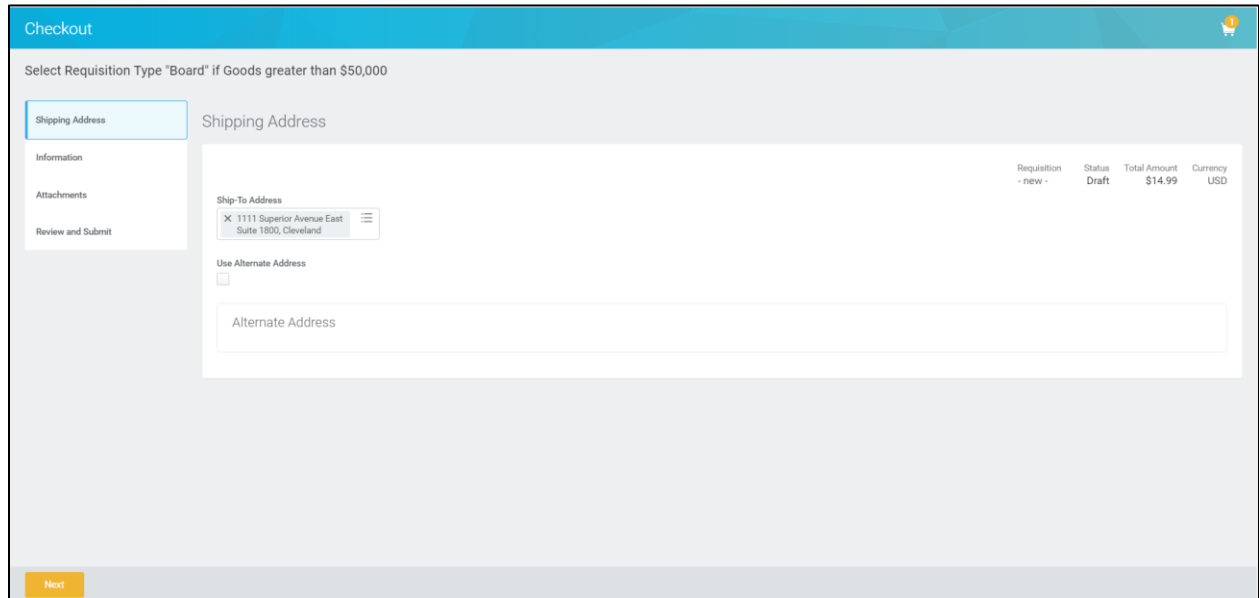
Field Name	Required / Optional	Description
Quantity	Required	Identifies the number of items to order.
Memo	Optional	Enter any necessary comments. <b>Example:</b> Please store in equipment closet on 2 <sup>nd</sup> floor.

**Note:** If you want to add additional items to your cart, click  and return to [Step 3](#).


27. Click  to complete your order and go to the *Checkout* screen.



## Checkout – Shipping Address

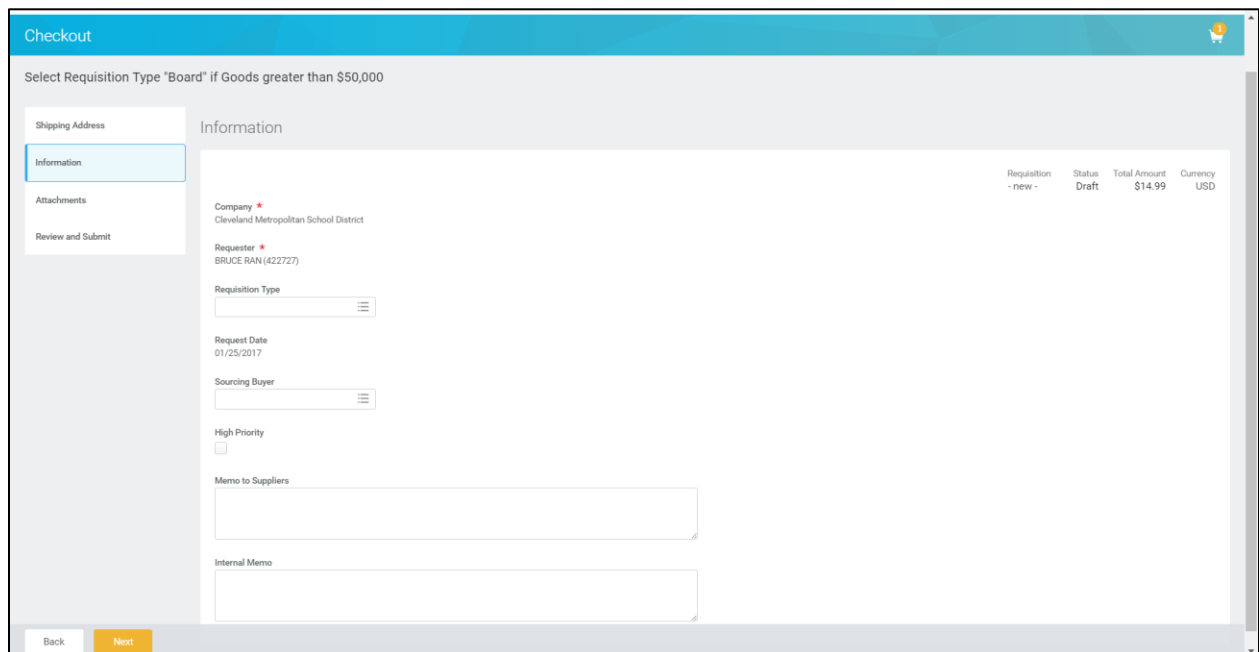


28. Review the **Ship-To Address** to confirm it is correct.

**Note:** If the **Ship-To Address** is incorrect, click  to search for the correct address. Do **Not** use the **Alternate Address** option.

29. Click Information .

## Checkout – Information



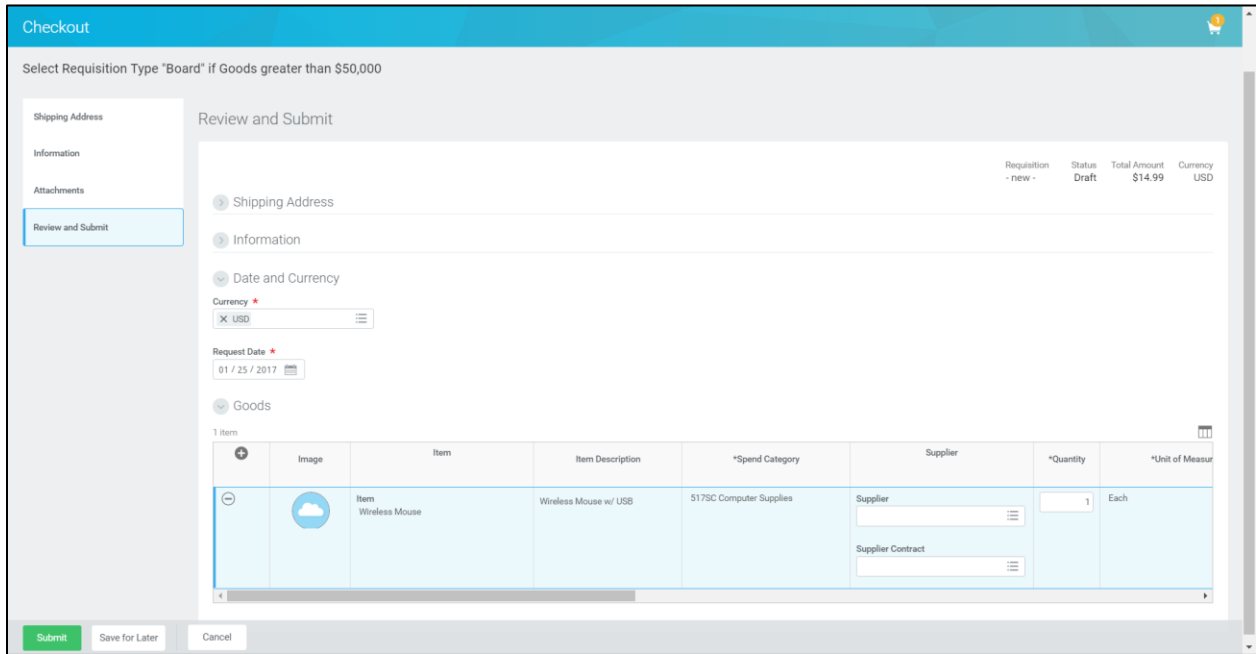
30. As required, review, update, and/or complete the following fields:

Field Name	Required / Optional	Description
<b>Requisition Type</b>	Required	Identifies how the requisition will be processed. Options include: <ul style="list-style-type: none"> <li>• Board Authorizing</li> <li>• Board Awarding</li> <li>• Regular</li> </ul> <b>Note:</b> Select Board Awarding when you need to purchase goods totaling more than \$50,000. Select Authorizing when you are purchasing goods from a previously approved authorizing Board resolution and will draw down from the amount stated in the resolution.
<b>Sourcing Buyer</b>	<u>Do Not Use</u>	Buyers are setup per cost centers and therefore this field will not be used.
<b>Memo to Supplier</b>	Optional	Any notes or information to communicate to the vendor/supplier about the order.
<b>Internal Memo</b>	Optional	Any notes or information to communicate to the buyers, approver, or anyone who access the requisition.

**Note:** If you want to add an attachment to the requisition, click  and follow the onscreen instructions.

31. Click  .

### Checkout – Review and Submit



32. As required, review, update, and/or complete the following fields:

Field Name	Required / Optional	Description
<b>Currency</b>	Required	Type of money to calculate the prices/costs.
<b>Request Date</b>	Required	Creation date of the requisition.
<b>Item</b>	Required	Identifies the name of the product to be procured.
<b>Item Description</b>	Required	Identifies the product to be procured.
<b>Spend Category</b>	Required	Is a way of grouping similar items or services that drives the financial reporting.
<b>Supplier</b>	Optional	Identifies the vendor filling the order.
<b>Supplier Contract</b>	Optional	Identifies the applicable contract with the vendor, if it exists.
<b>Quantity</b>	Required	Identifies how many items/services to procure.
<b>Unit of Measure</b>	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> <li>• Each</li> <li>• Box</li> <li>• Case</li> </ul>
<b>Unit Cost</b>	Required	Identifies the dollar amount for each item.
<b>Extended Amount</b>	Required	Identifies the total cost for the line item.

Field Name	Required / Optional	Description
<b>RFQ Required</b>	Optional	Indicates is a Request for Quotation is needed before sourcing the requisition.
<b>Requested Delivery Date</b>	Optional	Identifies the date the order needs to be filled by.
<b>Memo</b>	Optional	Use to provide additional information to those processing the requisition.
<b>Fund</b>	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
<b>Cost Center</b>	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
<b>Function</b>	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
<b>Program</b>	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
<b>Additional Worktags</b>	Optional	Used when creating a requisition being paid by a Grant, Gifts, or Projects. <b>Note:</b> Workday overwrites or defaults in the correct Fund matching the Grant entered in this field.

33. As required, complete one of the following:

If you want to...	Then...	Go to
Cancel the checkout,	Click <input type="button" value="Cancel"/> .	– <b>Note:</b> This only cancels the screen/view. To cancel the requisition, you would need to access the Draft requisition from the <b>My Requisitions</b> worklet and select <b>Cancel</b> from the <b>Actions</b> button. This is required to release the funds for another spend.
Save the requisition, to finish processing at a later time,	Click <input type="button" value="Save for Later"/> .	Step <a href="#">34</a>

Finish processing the requisition,	Click  .	Step <u>35</u>
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View Requisition REQ-XXXXXX

View Requisition REQ-000560 📄 🖨️

<b>Worker</b> Employee: BRUCE RAN (422727)	<b>Status</b> Draft	<b>Total Amount</b> \$14.99	<b>Currency</b> USD
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📁 Shipping Address


Ship-To Address 📍 1111 Superior Avenue East Suite 1800, Cleveland

📁 Information

Company	Cleveland Metropolitan School District
Request Date	01/26/2017
Requisition Type	Regular
Consolidate Requisitions on Purchase Orders	No
Sourcing Buyer	(empty)
High Priority	No
Memo to Suppliers	(empty)
Internal Memo	(empty)

📁 Goods Lines

1 Item

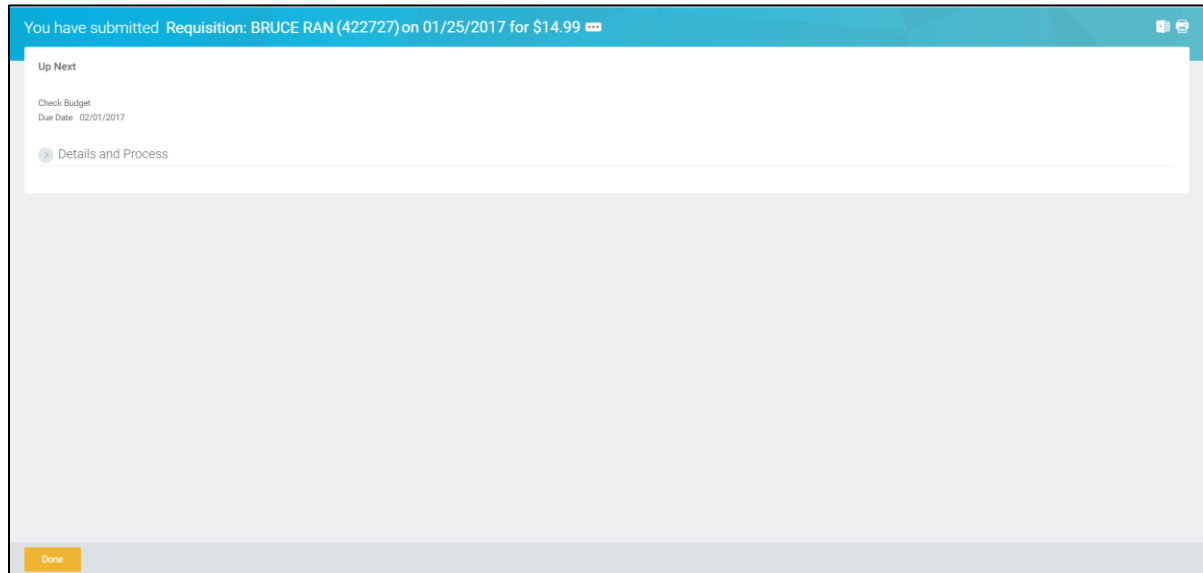
Line	Image	Item	Fulfillment Source	Quantity	Unit of Measure	Unit Cost	Extended Amount	RFQ Required	Requested Delivery Date	Memo	*Fund
1		Wireless Mouse	Supplier Catalog	1	Each	14.99	14.99	No			00150-1 General Fund

Add More

34. The system displays the requisition in View mode. At this point, you can navigate away from the requisition, as you have completed this task.

**Note:** Access saved requisitions from the **My Requisitions** worklet.

### *You have submitted Requisition*




35. Review the displayed information.

36. Click **Done** to exit the screen.

### ***Result:***

You have successfully created a purchase requisition by searching a catalog. Now access your Workday **Inbox (Actions or Archive tabs)** to confirm the requisition passed the Budget Check and record the requisition number.

**Note:** For additional information on this requisition, click  to the left of **Details and Process** and review the available details, including the next steps in the procurement process.

**Note:** When a requisition fails Budget Check, the Requestors will receive an action item in their Workday Inbox. Refer to the Budget Amendment job aid for additional information.