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**.

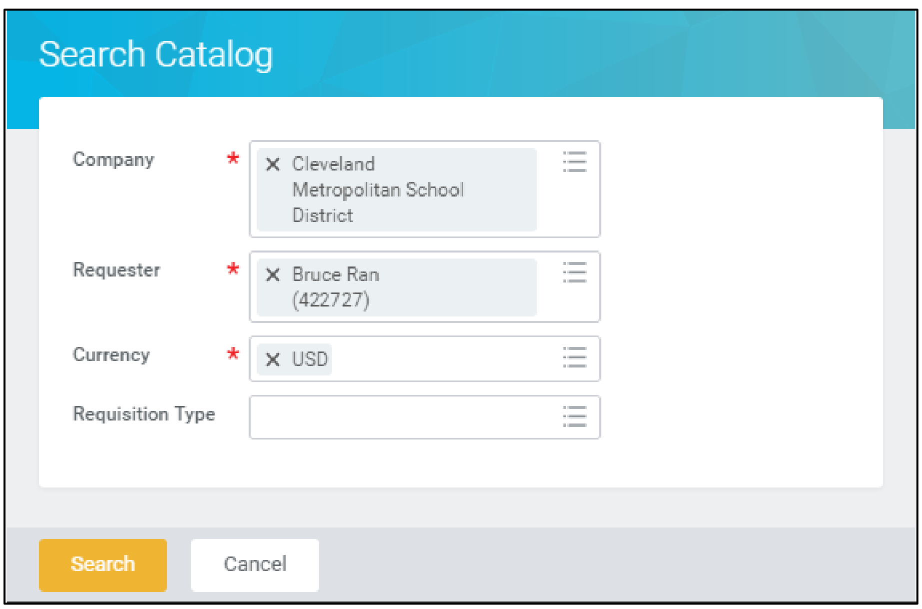
Audience: All roles

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.

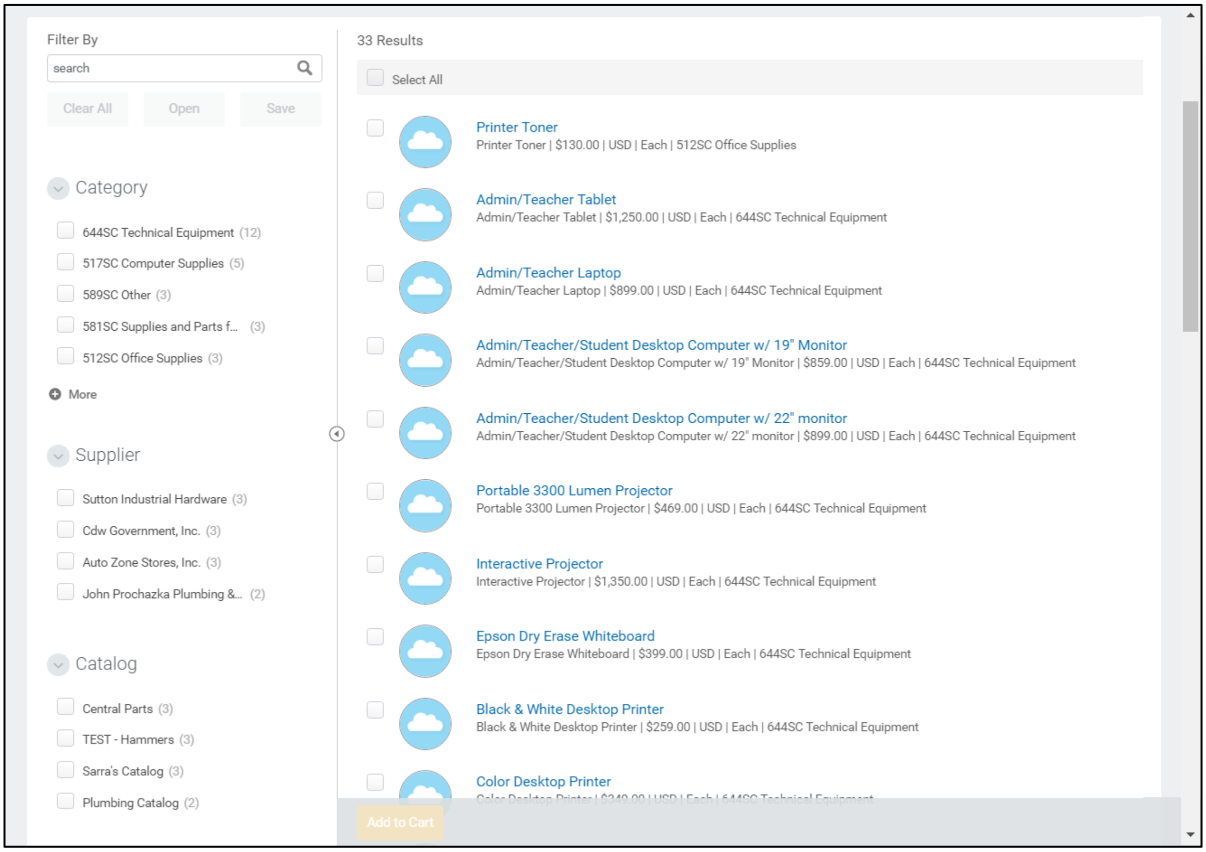
1. As required, review, update, and/or complete the following fields:

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

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

2. Click **Search**.

Search Catalog - Selection



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

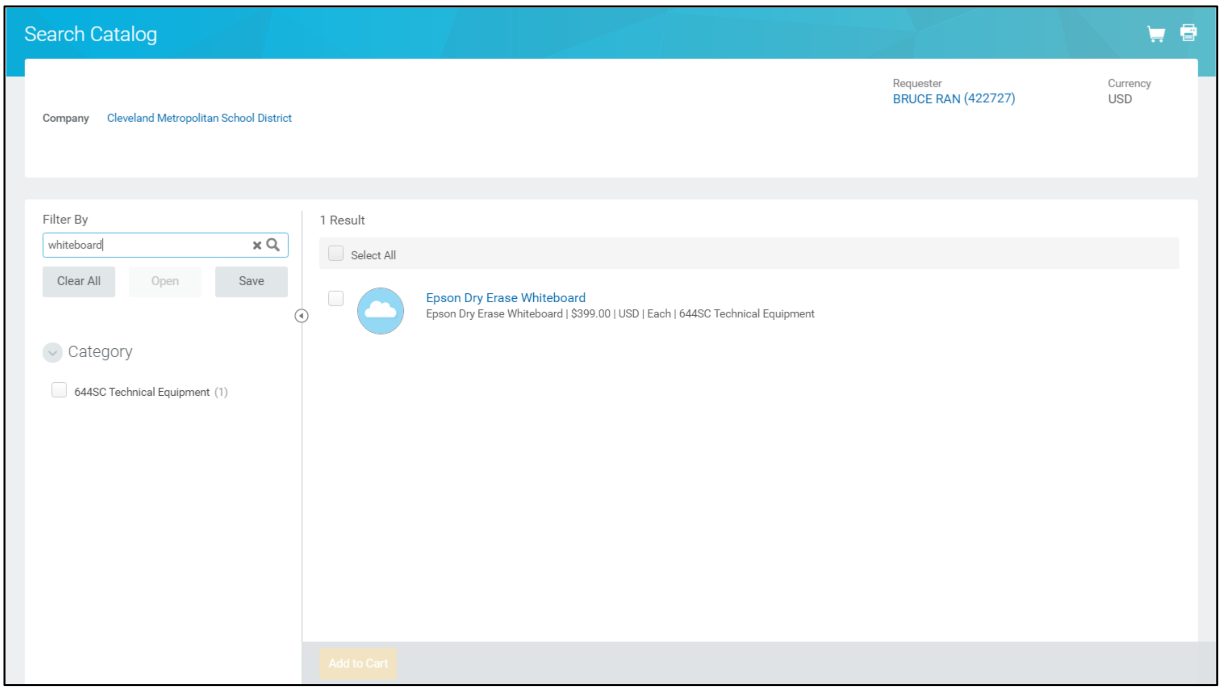
3. As required, complete one or more of the following:

If you want to…	Then…	Go To
Search for an item by name,	Enter the name of the item in the **search** field.	Step 4
Search by **Category**,	Click to the left of the required Category.	Step 10
Search by **Supplier**,	Click to the left of the required Supplier.	Step 15

If you want to…	Then…	Go To
Search by **Catalog**,	Click to the left of the required Catalog.	Step 20
Check out,	Click in top right of the screen.	Step 25

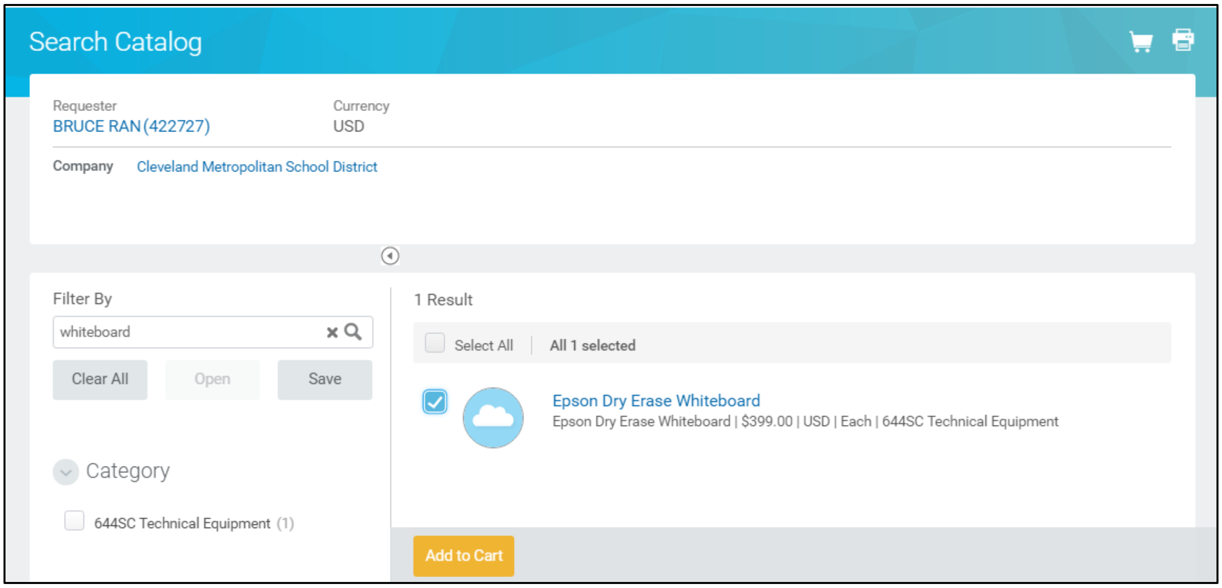
4. Press **Enter** to execute the search, and go to the *Search Catalog – Results* screen.

Search Catalog - Results



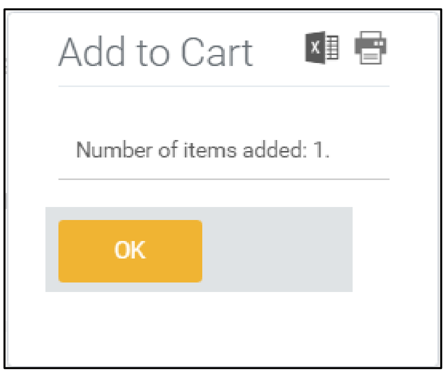
5. Review the search results.
6. Click to the left of the required item in the **Results** section to select it.
Note: If this is not the item you require, return to Step 3.

Search Catalog - Select



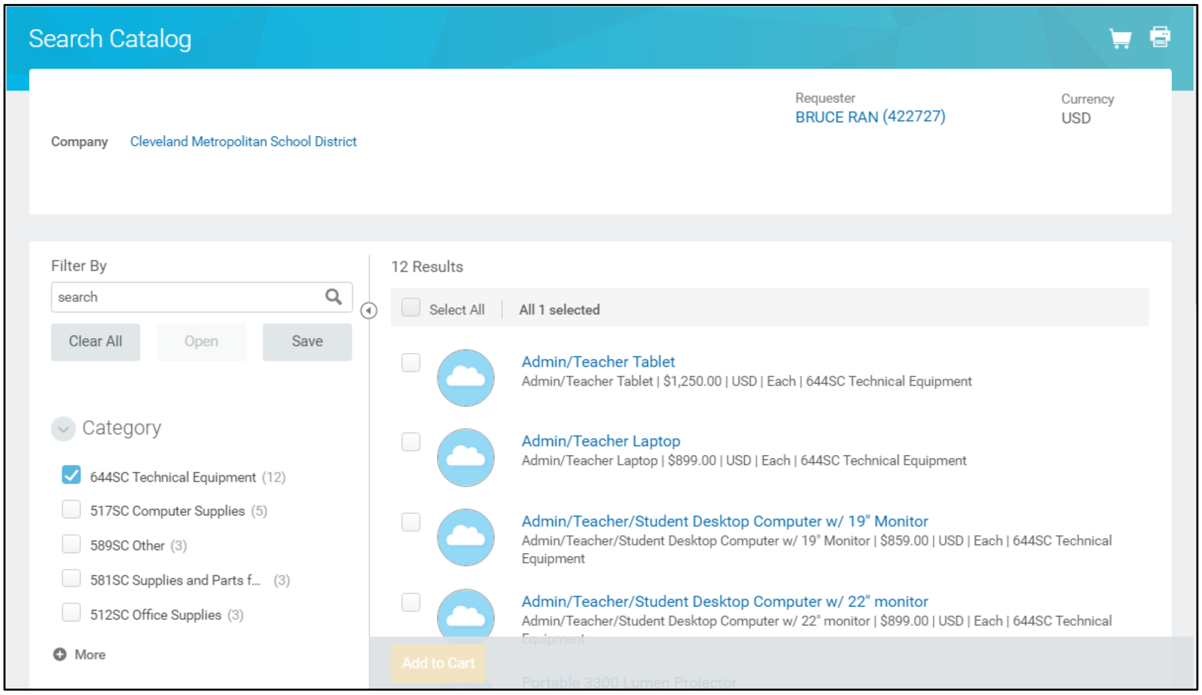
7. Click Add to Cart to add the item to the cart.

Cart Confirmation



8. Click **OK** to acknowledge the number of items added to the cart.
9. Return to Step 3.

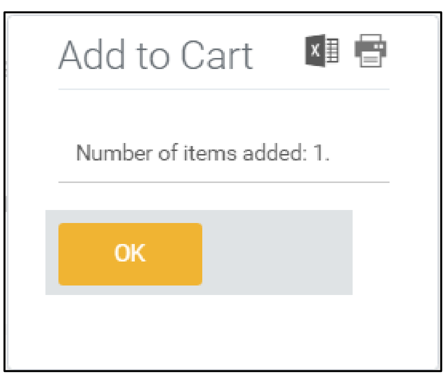
Search Catalog - Category



10. Review the displayed results.
11. Click ☐ to the left of the required item(s) from the **Results** section of the screen.

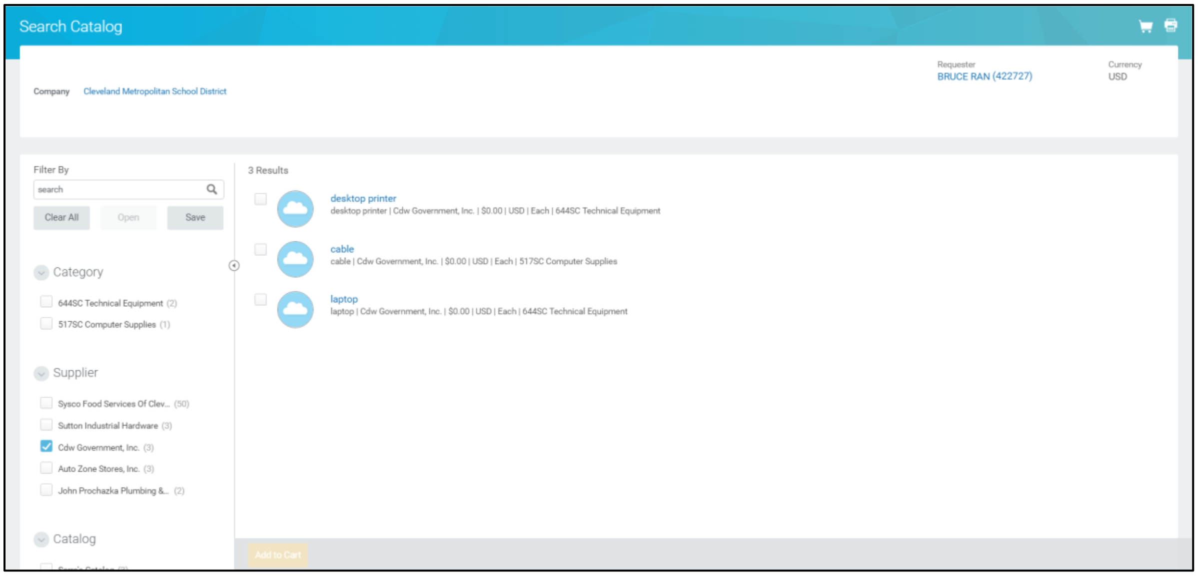
    Note: If this is not the item you require, return to Step 3.
12. Click Add to Cart to add the item(s) to the cart.

Cart Confirmation



13. Click **OK** to acknowledge the number of items in the cart.
14. Return to Step 3.

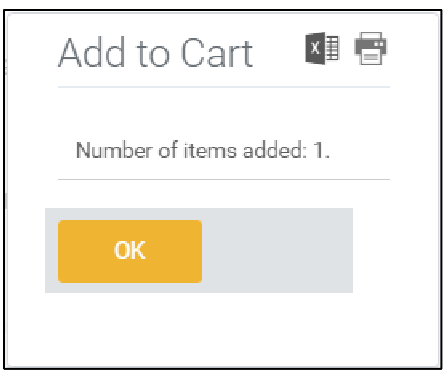
Search Catalog – Supplier



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

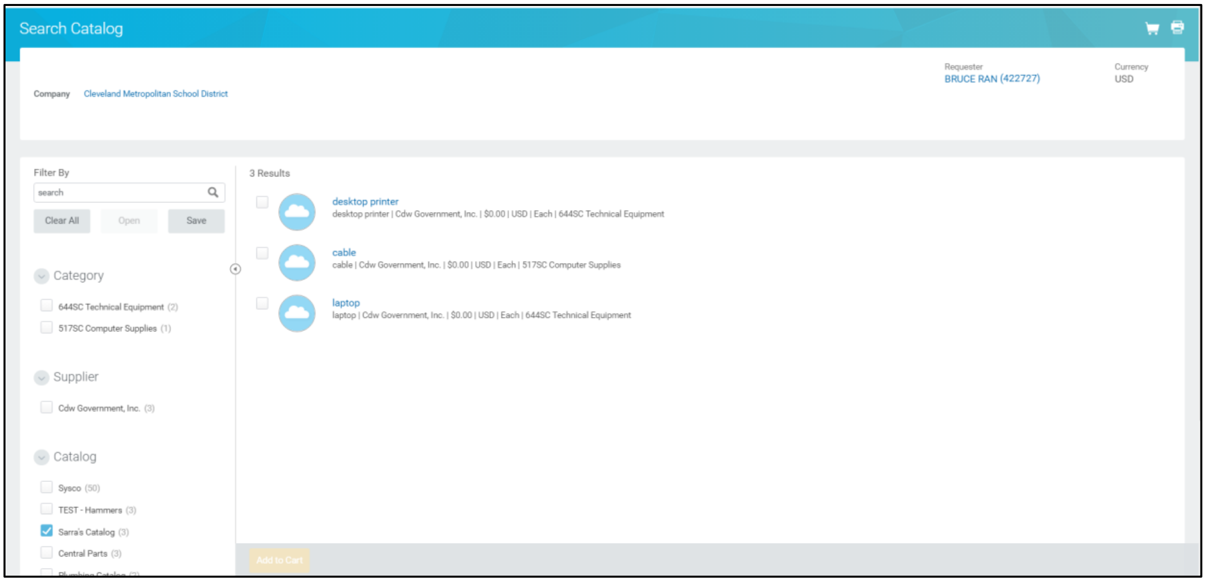
    Note: If this is not the item you require, return to Step 3.
17. Click Add to Cart to add the item(s) to the cart.

Cart Confirmation



18. Click **OK** to acknowledge the number of items in the cart.
19. Return to Step 3.

Search Catalog – Catalog

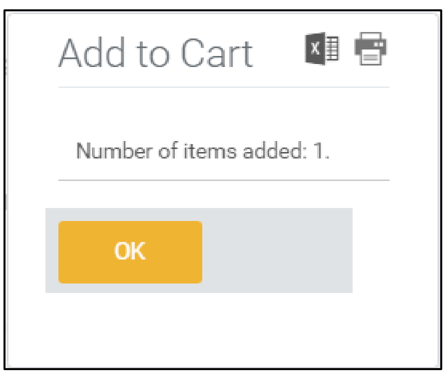


20. Review the displayed results.
21. Click to the left of the required item(s) from the **Results** section of the screen.

    Note: If this is not the item you require, return to Step 3.

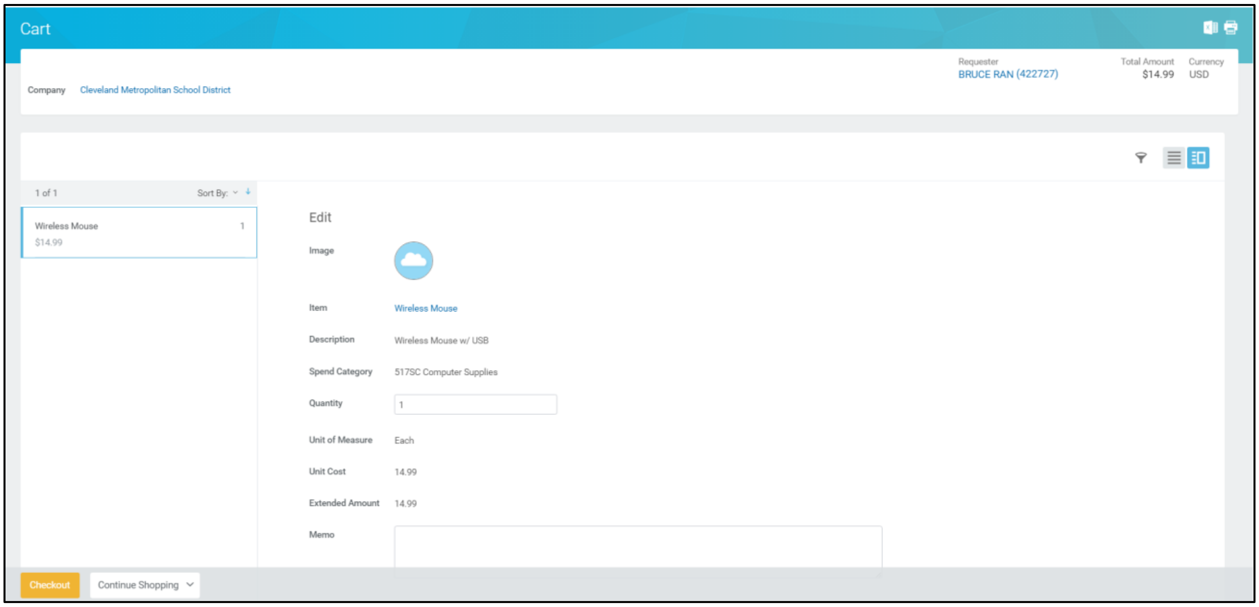
22. Click Add to Cart to add the item(s) to the cart.

Cart Confirmation



23. Click **OK** to acknowledge the number of items in the cart.
24. Return to Step 3.

Cart



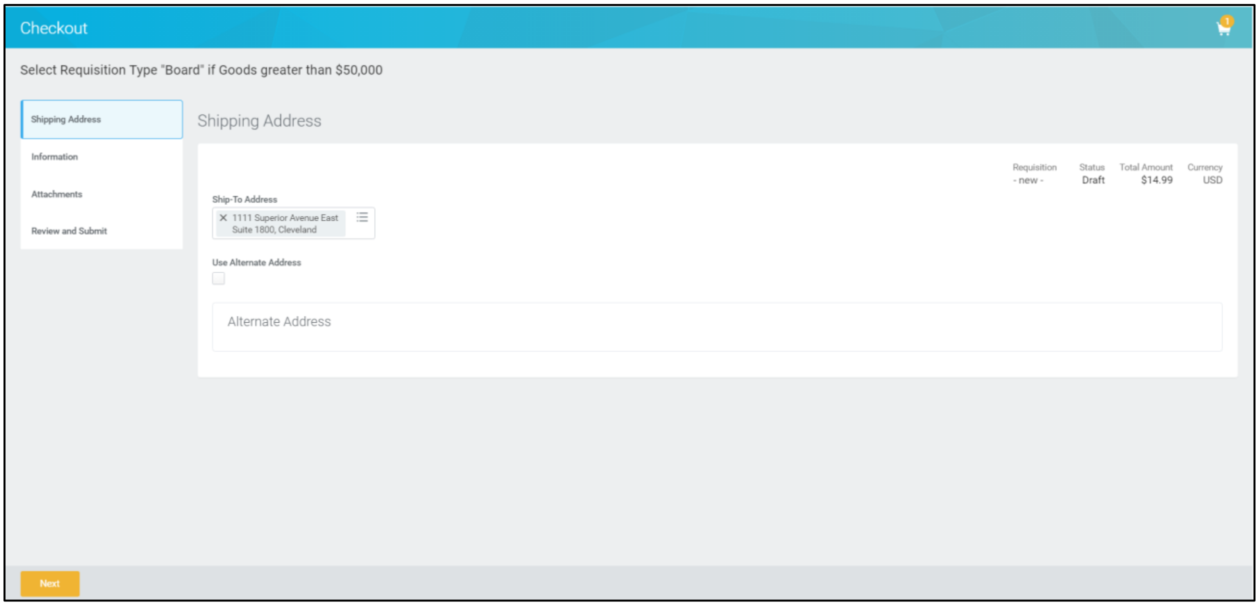
25. Review the information, to confirm what you are ordering is correct.
26. As required, review, update, and/or complete the following fields:

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

Note: If you want to add additional items to your cart, click Continue Shopping and return to Step 3.

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

Checkout – Shipping Address

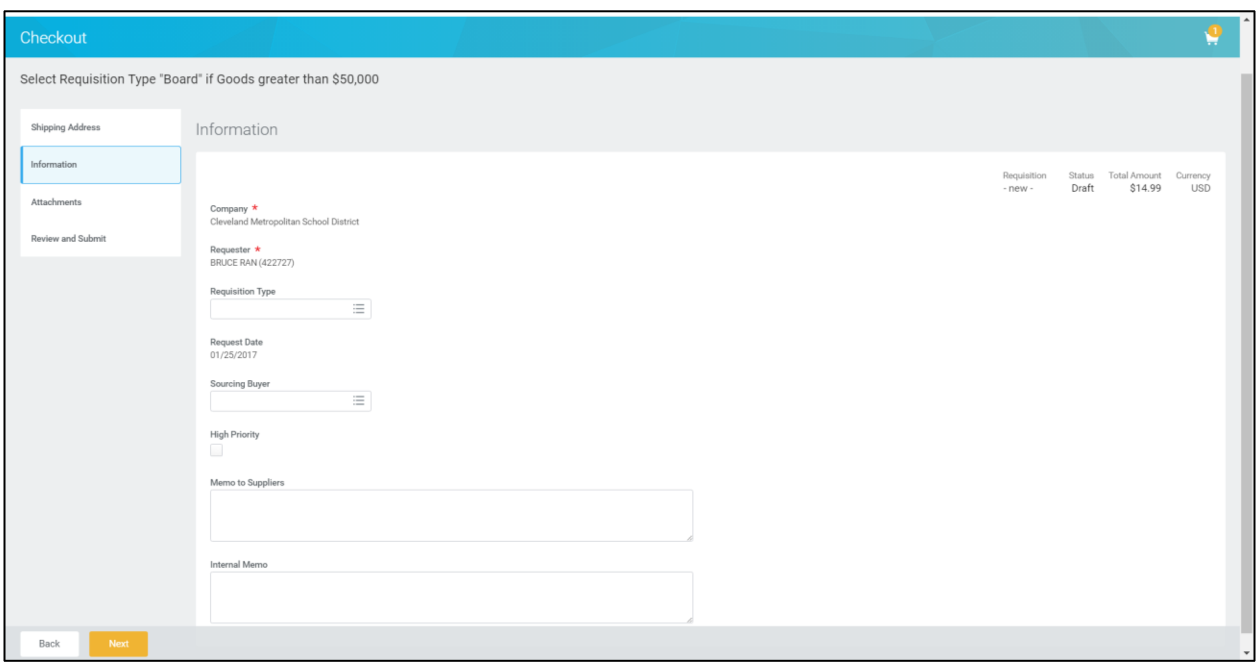


28. Review the **Ship-To Address** to confirm it is correct.

    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



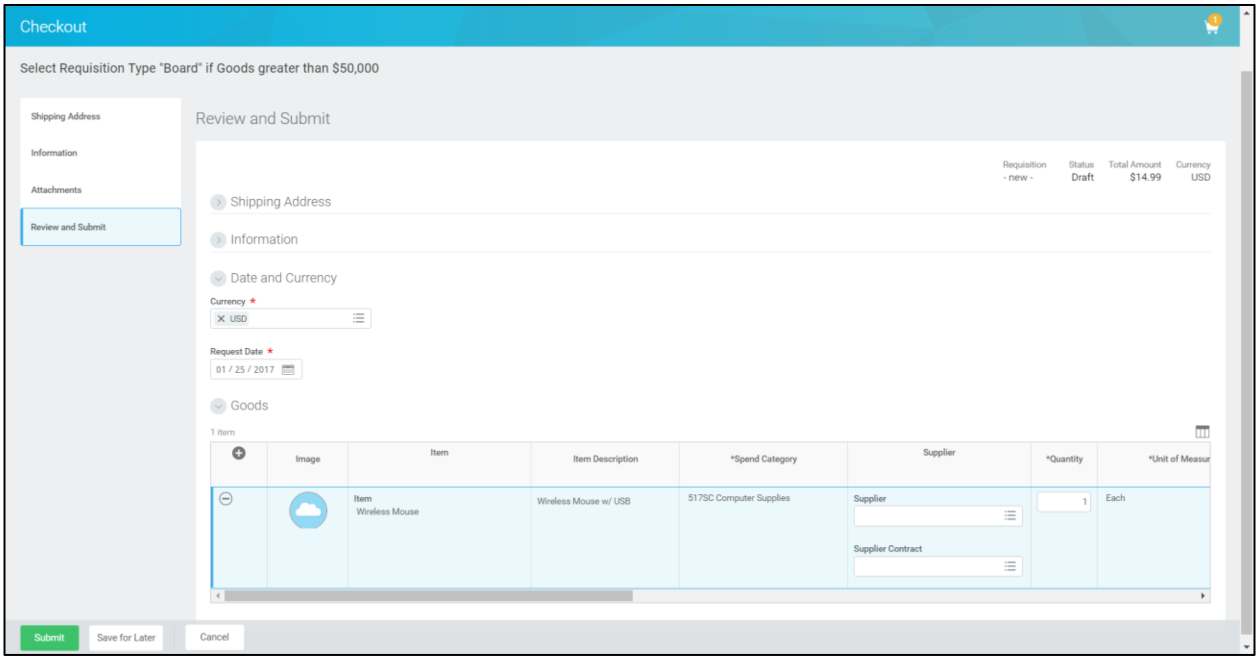
30. As required, review, update, and/or complete the following fields:

Field Name	Required / Optional	Description
Requisition Type	Required	Identifies how the requisition will be processed. Options include: • Board Authorizing • Board Awarding • Regular ***Note:*** 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.
Sourcing Buyer	Do Not Use	Buyers are setup per cost centers and therefore this field will not be used.
Memo to Supplier	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.

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

31. Click Review and Submit .

Checkout – Review and Submit



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

Field Name	Required / Optional	Description
Currency	Required	Type of money to calculate the prices/costs.
Request Date	Required	Creation date of the requisition.
Item	Required	Identifies the name of the product to be procured.
Item Description	Required	Identifies the product to be procured.
Spend Category	Required	Is a way of grouping similar items or services that drives the financial reporting.
Supplier	Optional	Identifies the vendor filling the order.
Supplier Contract	Optional	Identifies the applicable contract with the vendor, if it exists.
Quantity	Required	Identifies how many items/services to procure.
Unit of Measure	Required	Identifies how the requested item is sold. Examples include: • Each • Box • Case
Unit Cost	Required	Identifies the dollar amount for each item.
Extended Amount	Required	Identifies the total cost for the line item.

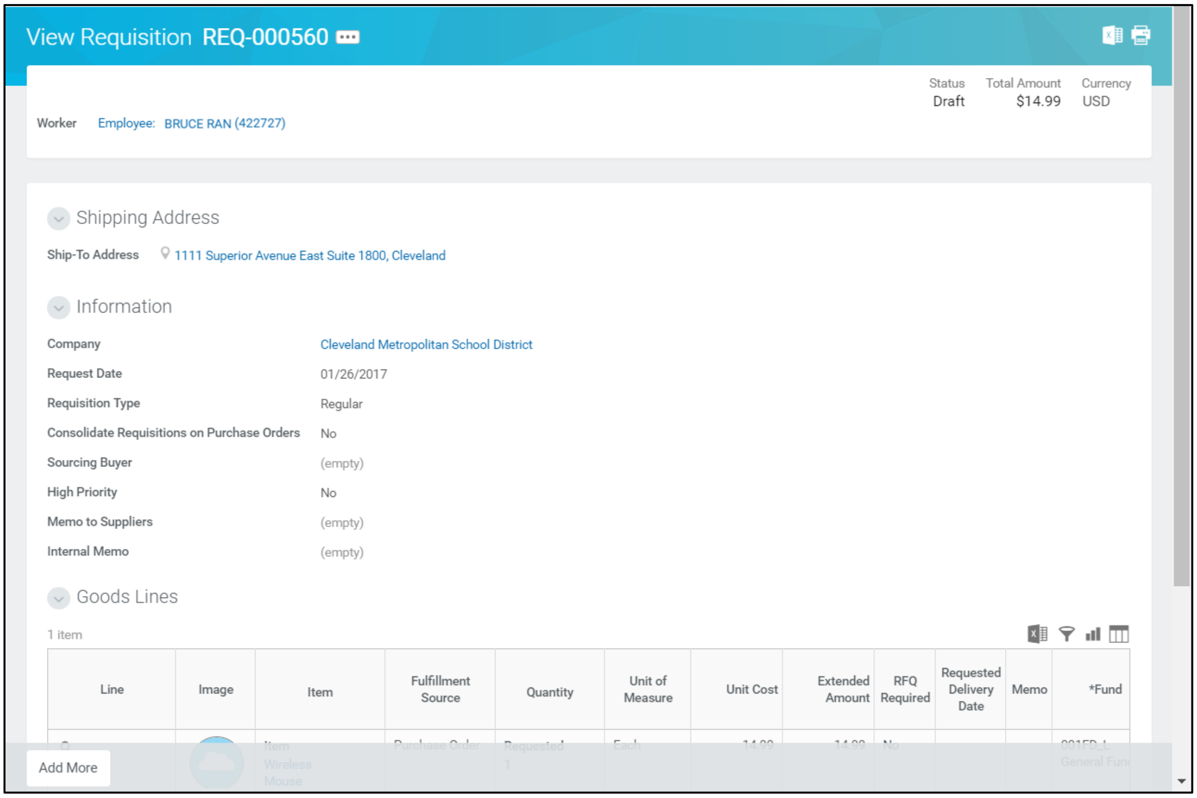
Field Name	Required / Optional	Description
RFQ Required	Optional	Indicates is a Request for Quotation is needed before sourcing the requisition.
Requested Delivery Date	Optional	Identifies the date the order needs to be filled by.
Memo	Optional	Use to provide additional information to those processing the requisition.
Fund	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
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. ***<u>Note:</u>*** 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 Cancel .	– ***<u>Note:</u>*** This only cancels the screen/view. To cancel the requisition, you would need to access the Draft requisition from the **My Requisitions** worklet and select **Cancel** from the **Actions** button. This is required to release the funds for another spend.
Save the requisition, to finish processing at a later time,	Click Save for Later .	Step 34

Finish processing the requisition,	Click Submit .	Step 35

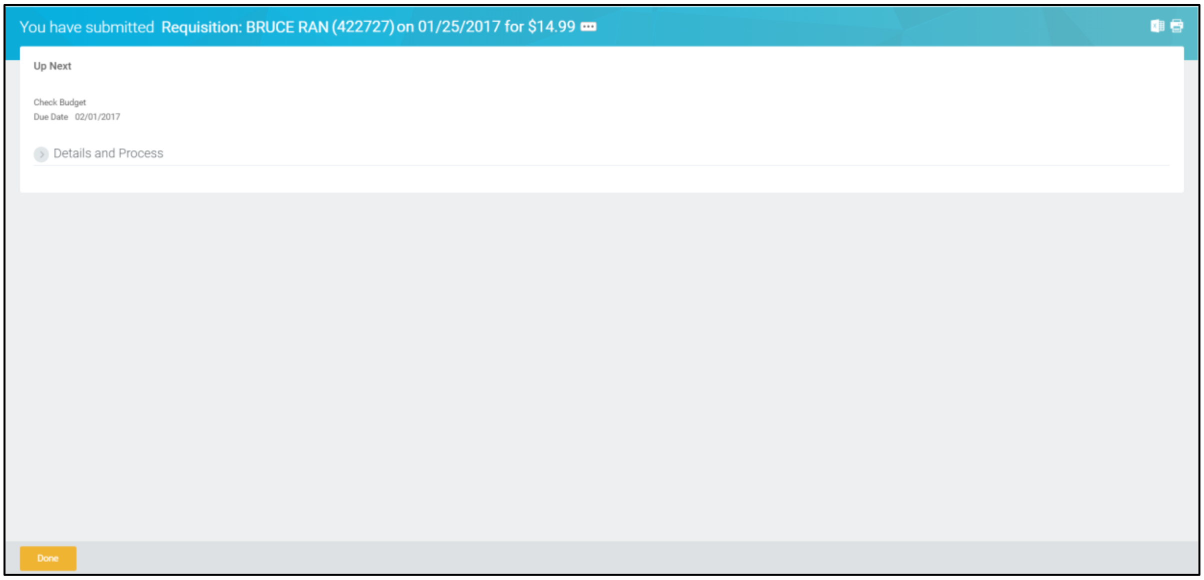
View Requisition REQ-XXXXXX



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.