

04_Create Requisition – Supplier Website

Purpose: The purpose of this task is to create a requisition using a supplier’s website.

How to Access: Open the **Purchases** worklet and click **Connect to Supplier Website**.

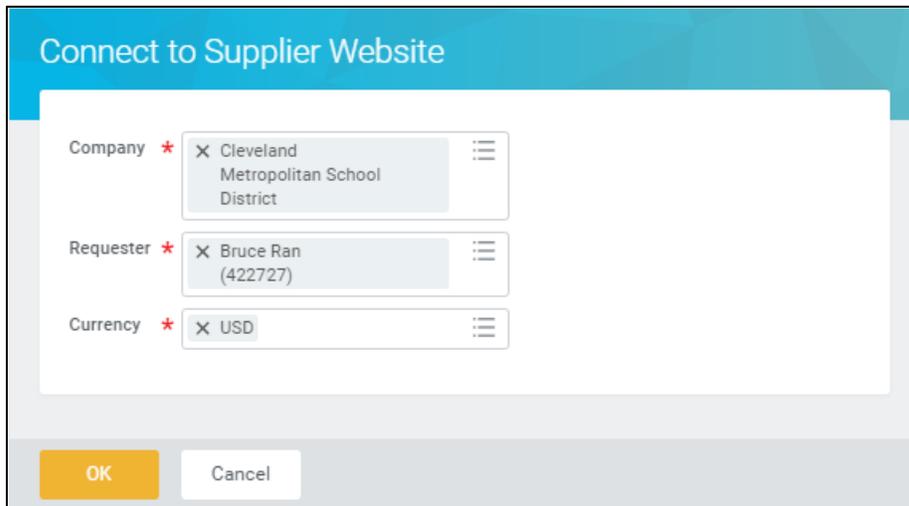
Audience: All Roles

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.
- It is not possible to create a Change Order for orders created using a supplier’s website. If additional items need to be added, then you will need to create a new order. If an item needs to be removed from the order, please contact the supplier directly.

Procedure: Complete the following steps to create a requisition by accessing a Supplier’s website to search for required items.

Connect to Supplier Website



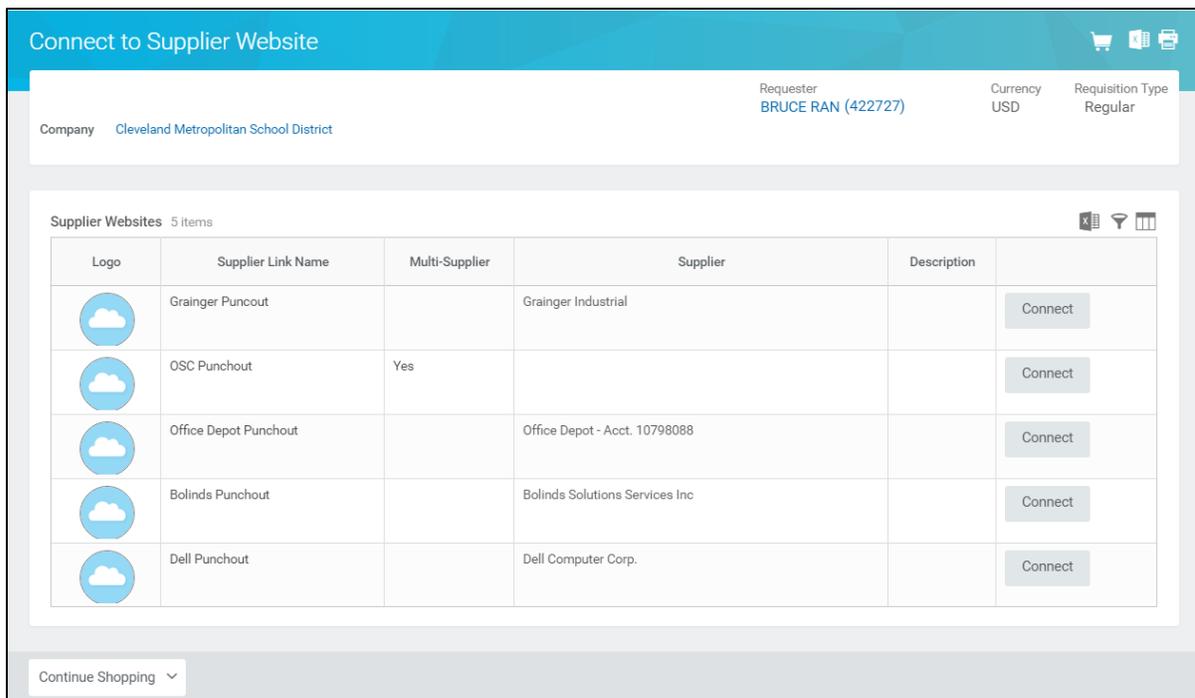
Note: This initial screen does not always display, and when it does not, go to [Step 3](#).

- As required, review and/or change the following fields:

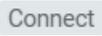
Field Name	Required / Optional	Description
Company	Required	Identifies the organization responsible for the requisition. (Do not change.)
Requester	Required	Identifies the employee creating the requisition.
Currency	Required	Identifies the type of money. (Do not change.)

- Click  to go to the *Create Requisition – Select an Option* screen.

Connect to Supplier Website



Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
	Grainger Puncout		Grainger Industrial		Connect
	OSC Puncout	Yes			Connect
	Office Depot Puncout		Office Depot - Acct. 10798088		Connect
	Bolinds Puncout		Bolinds Solutions Services Inc		Connect
	Dell Puncout		Dell Computer Corp.		Connect

- Click  to the right of the required supplier to go to their website.
Note: Each Supplier's website will look different, but the basic functionality is the same. Search for and select the required item(s) to purchase. Enter the quantity for each of the required items.
- Complete the required steps in the supplier's website to checkout or create order, which will return you to Workday, *View Cart* screen.

View Cart

View Cart 📄 🖨️

Company Cleveland Metropolitan School District

Requester Bruce Ran (422727)

Requisition Type Regular

Total Amount \$139.99

Currency USD

🔍
☰
📄

1 of 1 Sort By: ▾

Microsoft Sculpt Ergonomic Wireles...	1
\$139.99	

Edit 🗑️

Description Microsoft Sculpt Ergonomic Wireless Desktop Keyboard/Keypad/Mouse Combo, Black

Spend Category (empty)

Supplier Office Depot

Supplier Contract CON-000004: Office Depot Punchout

Quantity 1

Unit of Measure Each

Unit Cost 139.99

Extended Amount 139.99

Memo

Checkout
Continue Shopping ▾

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

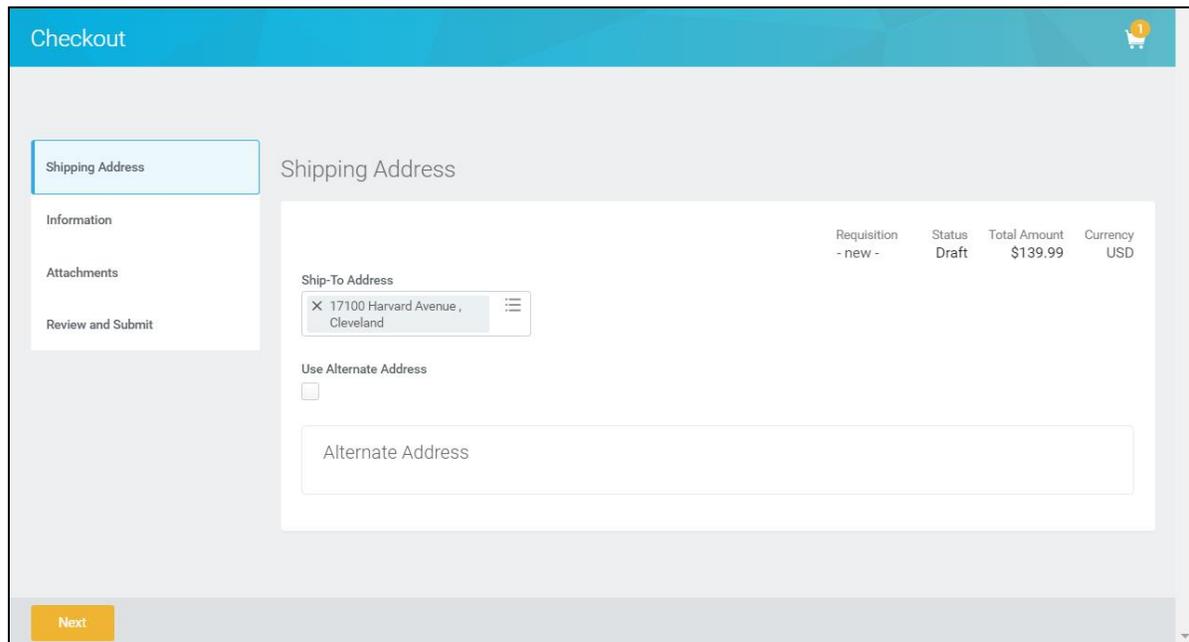
Field Name	Required / Optional	Description
Description	Required	Identifies the product to be procured.
Spend Category	Required	Is a way of grouping similar items or services that drives the financial reporting.
Supplier	Required	Identifies the vendor filling the order.
Supplier Contract	Required	Identifies the applicable contract with the vendor, if it exists. Note: A supplier contract is required for all punch-out suppliers.
Quantity	Required	Identifies how many items/services to procure.
Unit of Measure	Required	Identifies how the requested item/service is sold. Examples include: <ul style="list-style-type: none"> Each Box Case
Unit Cost	Required	Identifies the dollar amount for each item.

Field Name	Required / Optional	Description
Extended Amount	Required	Identifies the total cost for the line item.
Memo	Optional	Use to provide additional information to those processing the requisition.

Note: If you want to remove an item from the cart, click  for the required item.

- Click **Checkout** to go to the *Checkout* screen.

Checkout – Shipping Address



- Review the **Ship-To Address** field to confirm the order will ship to the correct location.
- Click **Information** to go to the *Checkout – Information* screen.

Checkout – Information

Checkout


Shipping Address

Information

Attachments

Review and Submit

Information

	Requisition	Status	Total Amount	Currency
	- new -	Draft	\$139.99	USD

Company *
Cleveland Metropolitan School District

Requester *
Bruce Ran (422727)

Requisition Type

Request Date
02/09/2017

Sourcing Buyer

High Priority

Memo to Suppliers

Back
Next

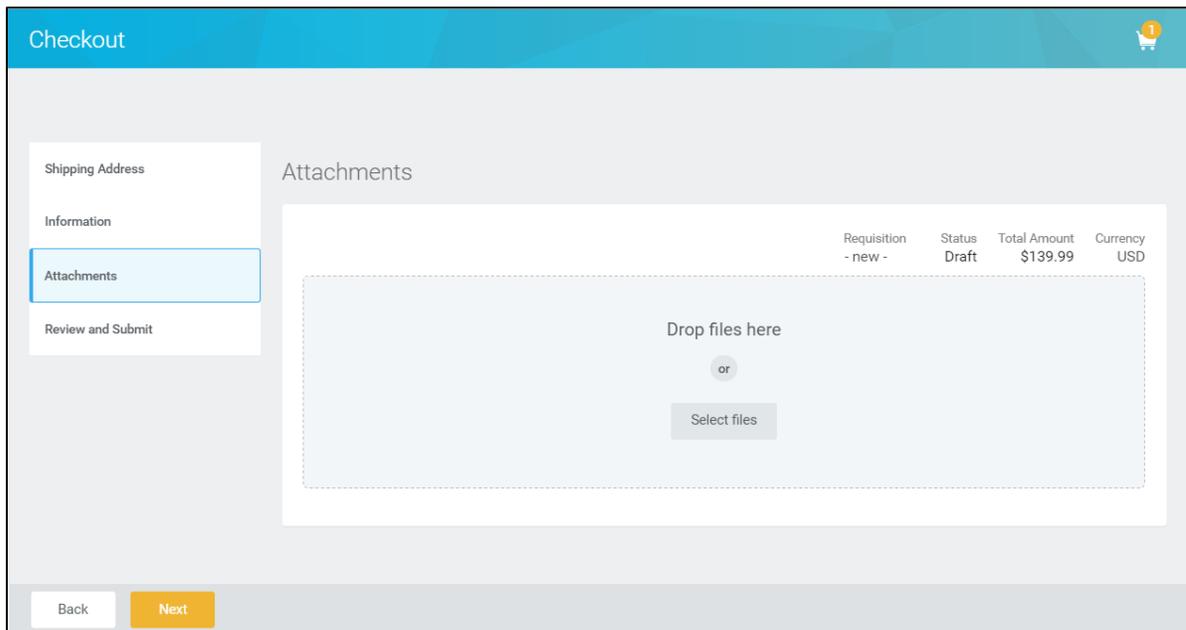
9. As required, review and/or complete the following fields:

Field Name	Required / Optional	Description
Requester	Required	Identifies the person who is creating the requisition.
Requisition Type	Required	Identifies how the requisition will be processed. Options include: <ul style="list-style-type: none"> Board Authorizing Board Awarding Regular <p>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.</p>
Request Date	Optional	Identifies when the requisition was initiated.

Field Name	Required / Optional	Description
Sourcing Buyer	<u>Do Not Use</u>	Buyers are setup per cost centers and therefore this field will not be used.
High Priority	<u>Do Not Use</u>	This High Priority checkbox is a standard Workday option that CMSD is not using. Do not select this checkbox.
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.

10. Click **Attachments** to go to the *Checkout – Attachment* screen.

Checkout – Attachments



11. As required, attach any supporting documentation to the requisition.

12. Click **Review and Submit** to go to the *Checkout – Review and Submit* screen.

Checkout – Review and Submit

Checkout

Shipping Address

Information

Attachments

Review and Submit

Review and Submit

	Requisition - new -	Status Draft	Total Amount \$139.99	Currency USD
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> Shipping Address

> Information

▼ Date and Currency

Currency *

Request Date *

▼ Goods

1 Item

	Image	Item	Item Description	*Spend Cat
+		Item	Microsoft Sculpt Ergonomic Wireless Desktop Keyboard/Keypad/Mouse Combo, Black	

Submit
Save for Later
Cancel

13. As required, complete, review, and/or update 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	Required	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.

Field Name	Required / Optional	Description
Unit of Measure	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> • Each • Box • Case
Unit Cost	Required	Identifies the dollar amount for each item.
Extended Amount	Required	Identifies the total cost for the line item.
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 fund will pay for the items being procured.
Cost Center	Required	Used to identify which cost center will pay for the items being procured.
Function	Required	Used to identify which function will pay for the items being procured.
Program	Required	Used to identify which program will pay for the items being procured. Value defaults in based on the cost center entered on the requisition.
Additional Worktags	Optional	Used when creating a requisition being paid by a Grant, Gifts, or Projects. Note: Workday overwrites or defaults in the correct Fund matching the Grant entered in this field.

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

If you want to...	Then...	Go to
Cancel the checkout,	Click  .	<p>–</p> <p>Note: 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.</p>
Save the requisition, to finish processing at a later time,	Click  .	Step 15
Finish processing the requisition,	Click  .	Step 16

View Requisition REQ-00XXXX

View Requisition REQ-000106 📄 🖨

Worker Employee: Bruce Ran (422727)

Status Draft

Total Amount \$139.99

Currency USD

Shipping Address

Ship-To Address 📍 17100 Harvard Avenue , Cleveland

Information

Company Cleveland Metropolitan School District

Request Date 02/09/2017

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

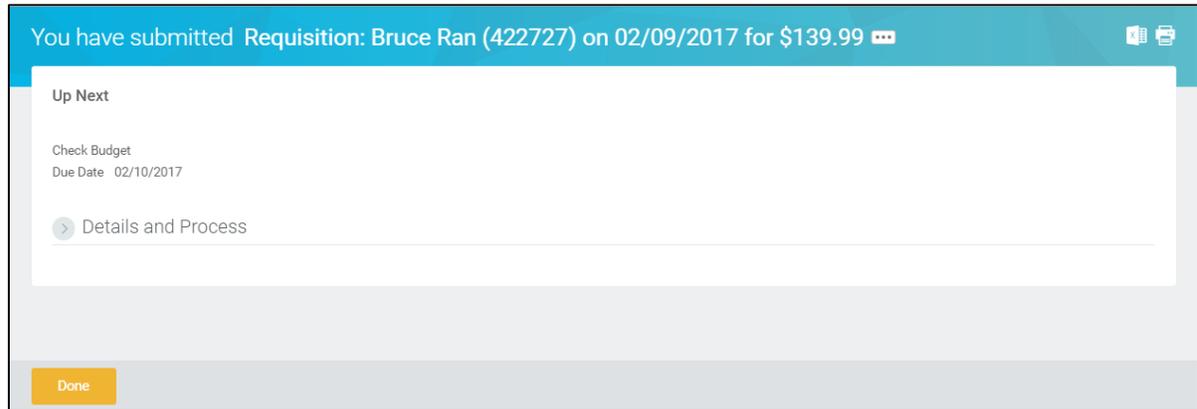
Line	Image	Item	Fulfillment Source	Supplier	Quantity	Unit of Measure	Unit Cost	Extended Amount	RFQ Required	Requested Delivery Date
1		Item	Purchase Order	Supplier	Requested	Each	130.00	130.00	No	

Add More

15. 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



16. Review the displayed information.

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

Result:

You have successfully created a purchase requisition by accessing a supplier's website. 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.