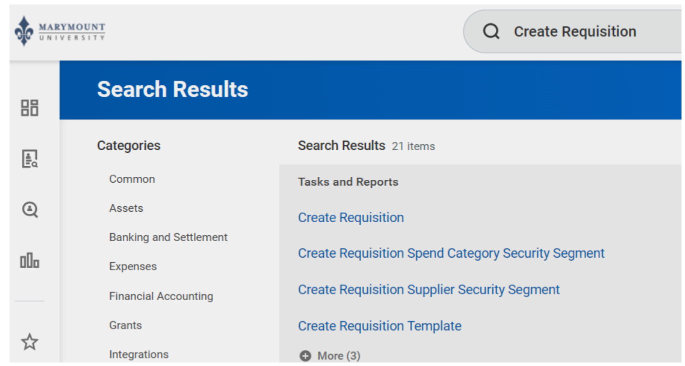
# The Process of Creating a Purchase Order Starts with a Requisition

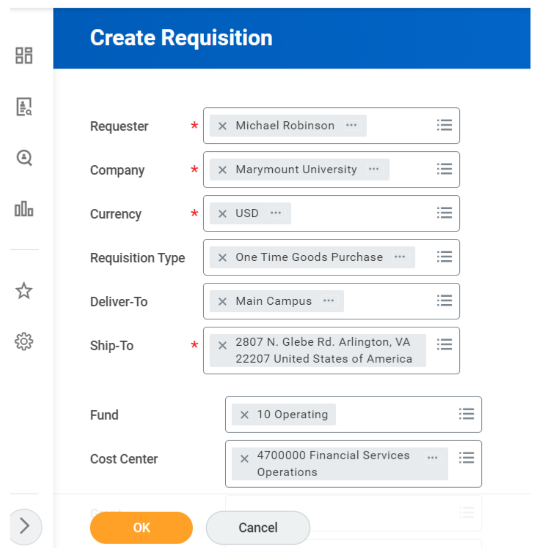
## Create Requisition for Goods and Services

- From the Workday home page enter Create Requisition in the search box.

- In the search results, click on the Create Requisition hyperlink to initiate the process.




- Enter the following in the appropriate field
  - Requestor name
  - Company: Marymount
  - Requisition Type. Select either

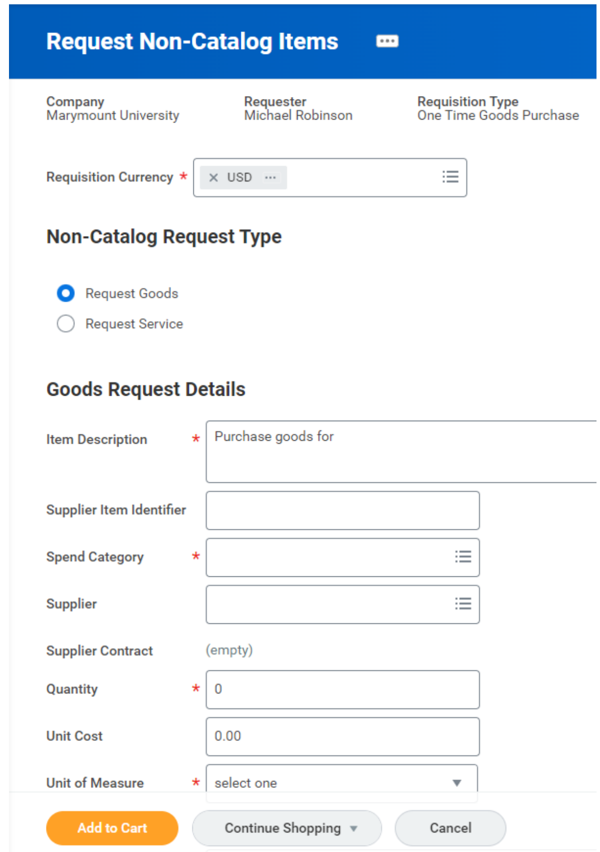



One Time Goods Purchases: To be used when only one invoice is expected. The specific quantity and amount are known.
One-time service contracts: To be used when the quantity and amount may not be specific
Service Contracts: Same as b above.

- Click OK
- Click on the hyperlink “Request Non-Catalog items” if this is the first time creating this requisition.
- Click Add from templates and requisitions if you have already created
- Click Select from my procurement Favorites if you already have a requisition saved to your favorite.

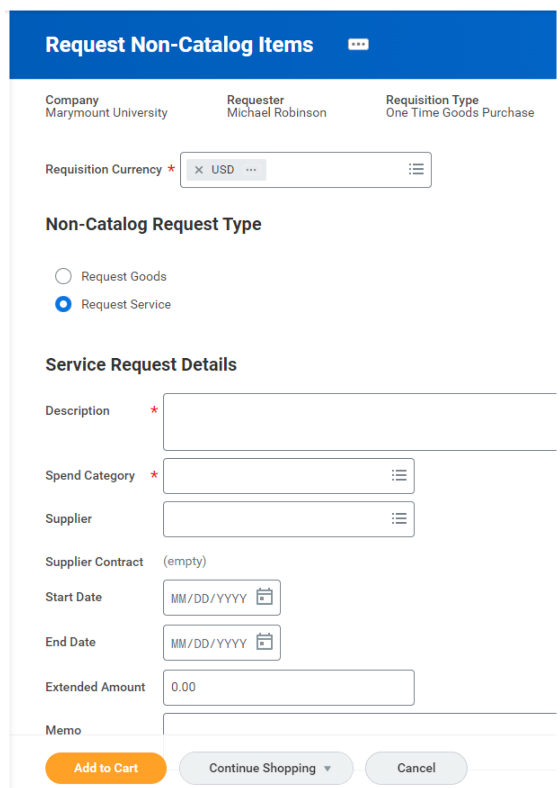
## Goods Requisition

1. Click Request Goods.
2. Item Description: Enter a description of the item(s) to be requisitioned.
3. Spend Category: Click on the drop-down list to select the appropriate Spend Category. Here you can search by Category or Hierarchy
4. Supplier: Enter Supplier name. ( *If not yet known leave blank*)
5. Quantity: Enter the number of items requested.
6. Unit Cost: Enter the unit cost, if known.
7. Unit of Measure (UOM): Click on the drop-down arrow to select the UOM.



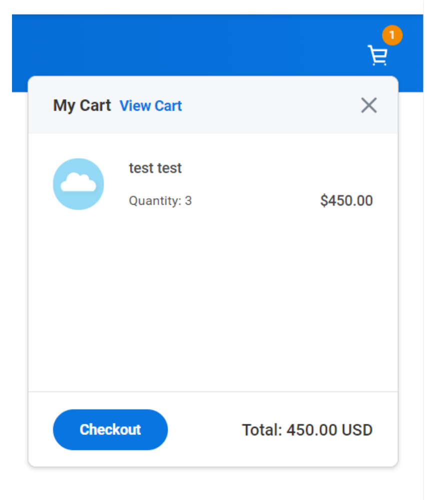

## Services Requisition

1. Description: Enter a description of the service.
2. Spend Category: Click on the dropdown list to select the appropriate Spend Category. Here you can search by Category or Hierarchy.
3. Supplier: Enter Supplier name.
4. Extended Amount: Enter the total amount of the Requisition.
5. Click the Add to Cart button when finished.
6. Click the OK button

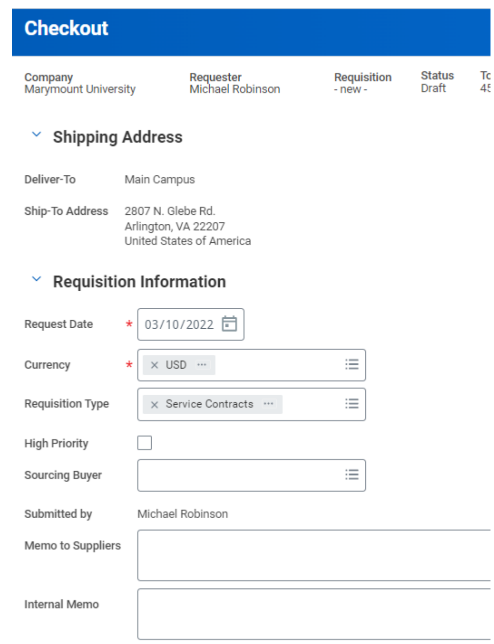


## Check Out Process

1. Click the shopping cart icon on the top right-hand corner of your screen when you are ready to check out.
2. Click the Check Out button.



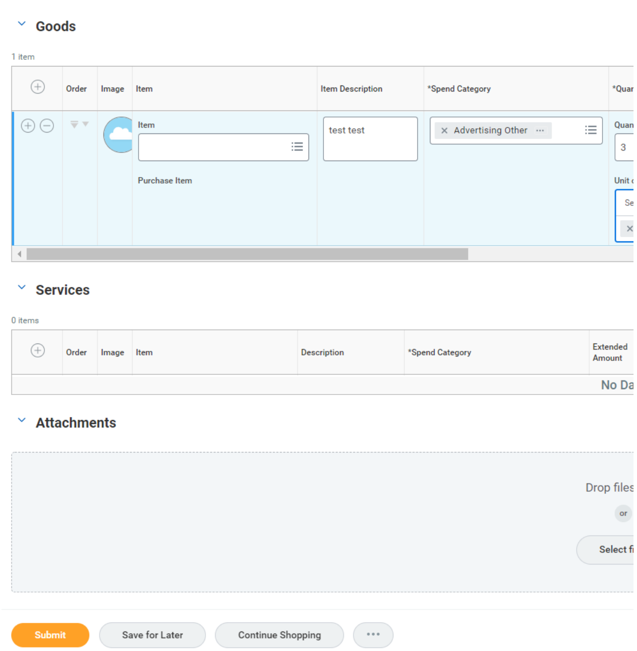

3. Review the Requisition Information. This screen allows you to enter a Memo to Suppliers and Internal Memo
    - Memo to Suppliers – Information entered within this field will display on the Purchase Order to the Supplier.
    - Internal Memo – Information entered here will not carry over to the invoice




Review your entries for accuracy. If you need to update your Worktags:

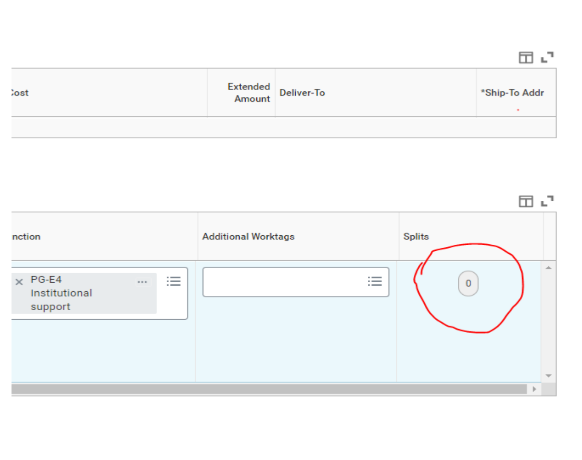
- Click within the Worktags section.
- Click the x next to the Worktag(s) you want to update.
- To search for Worktags, click the Prompt button in the Worktag field.

Type in the Worktag(s) value(s) one at a time and hit Enter on your keyboard after each one. Click the corresponding result to select it (bear in mind that the window will remain open). *TIP*: If using a Grant or Gift, enter that Worktag first and the rest of the Worktags will default.



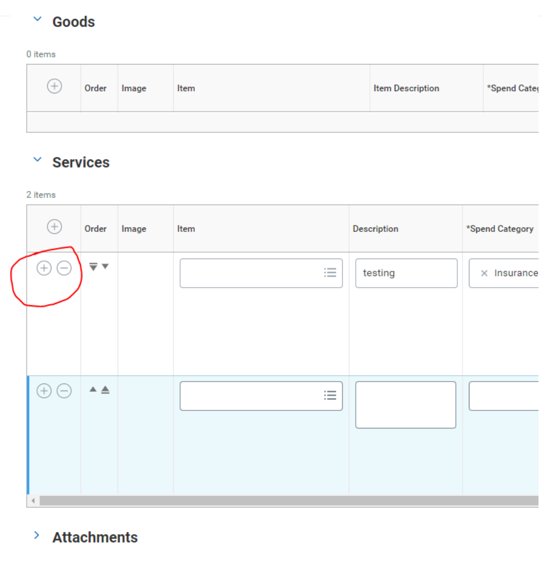
## Splitting Expenses Between Spend Categories

If the expense is being allocated to multiple spend categories within the same cost center use the splits function to the far right of the screen to break out the expense.

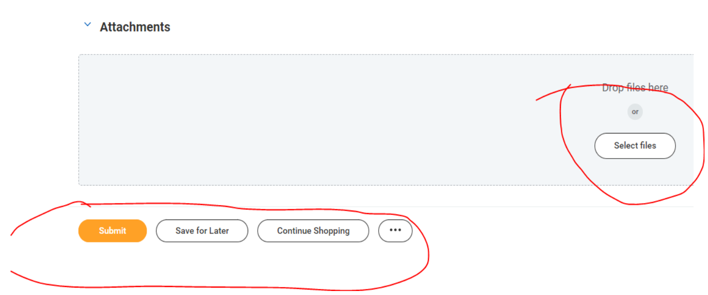



## Splitting expenses between Cost Centers

If the expense is being allocated to multiple cost centers add a separate line for each cost center and complete the required fields as above.




Attachments: Use this screen to upload saved documents by clicking the Select files button or Drag and Drop your files. The attached document must support the requisition being submitted. This is typically a quote, proforma invoice, or copy of the relevant contract




After your review, choose one of the following:

- Submit: kicks off the approval process.
- Save for Later: this allows you to save requisitions and return to them at a later time.
- Cancel: will discard the request.

## Process Details and Status

- Once the Requisition is submitted a confirmation screen appears which provides information on the next step of the process, details, and overall status.
- Clicking the Details tab, you can see additional details of the requisition.
- Clicking the Process tab allows you to see the approval process steps.
- The Done button allows you to return to the Home Page

## Source to Purchase Order

- Once the requisition has been fully approved Procurement will source the requisition to the PO and issue the PO.
- Once the PO is issued Procurement will email a copy of the PO to you and you should provide that PO number to the Supplier.
- The supplier should ensure that the PO number is included on the invoice when submitting to Marymount.