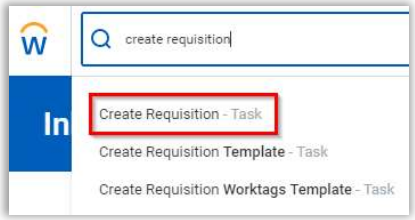
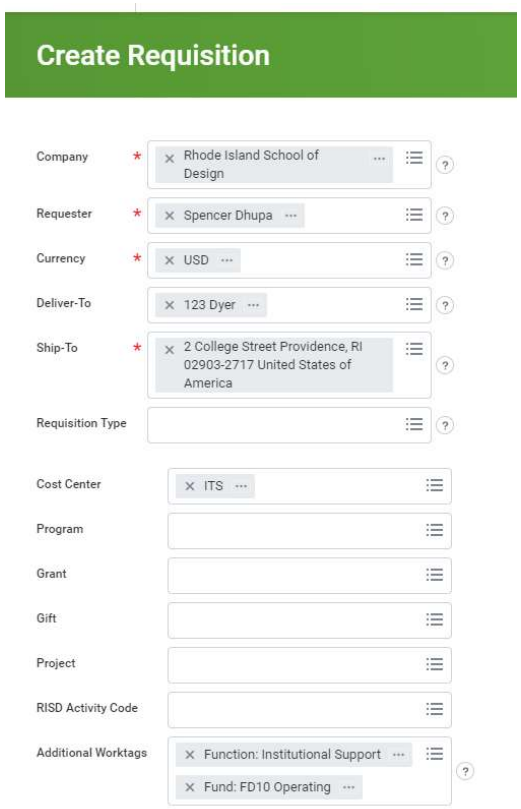
## CREATE A NEW REQUISITION

1. Enter *Create Requisition* in the **Search** bar and select the **Create Requisition** task




2. Specify the **Requisition Type**, the following are available:
   - **Blanket PO**
   - **Goods/Services Purchase**
3. Review/Update any of the fields on this Create Requisition Screen

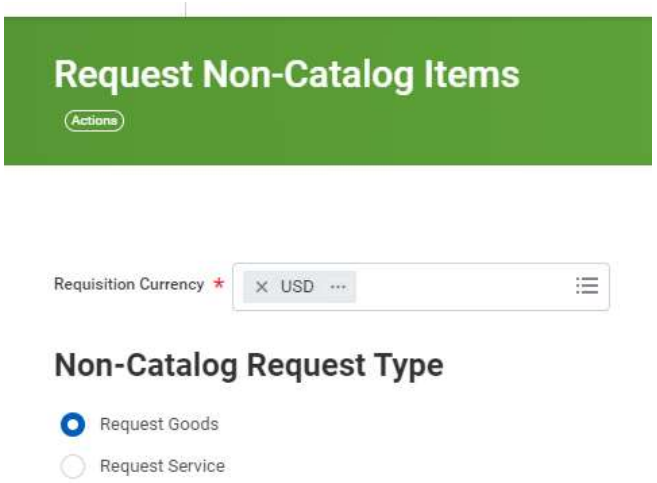


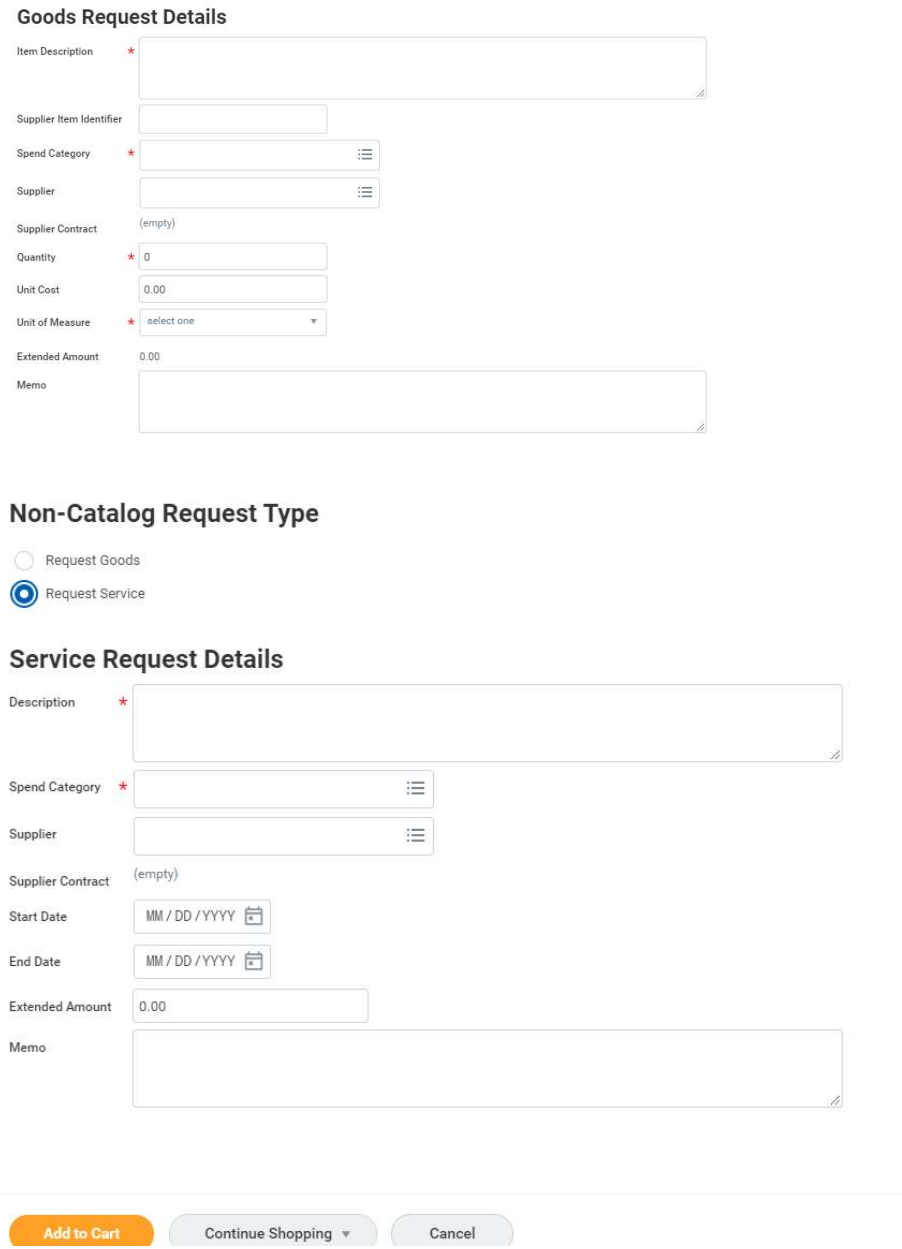

Note: Click the ? if you want to see the help information for fields on the screen.

### Shipping Address

4. Review the **Default Deliver-To** and **Default Ship-To Addresses**. Edit the addresses as needed.

   **Reminder**: If you are ordering from WB Mason, you can select the Ad Hoc addresses at the Ship To field. The Ad Hoc addresses is from the Alternate Addresses you have previously entered on a requisition.
5. Update or add any additional Financial Worktags.
6. Click **OK**
7. Click **Request Non-Catalog Items**
8. The requisition currency defaults
9. Specify the **Non Catalog Request Type** as *Good* or *Service*






### If this is a Requisition for Goods

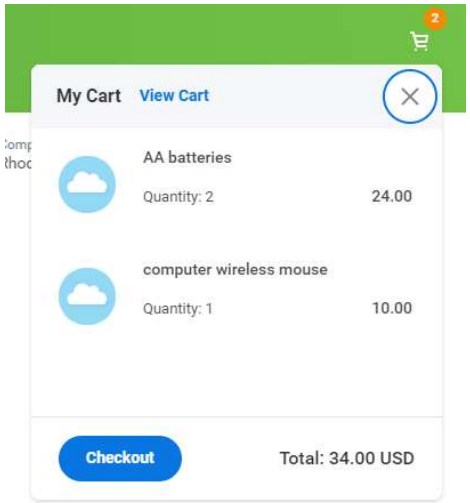
1. Enter an **Item Description**
2. Enter the **Spend Category** for the good or Click Prompt to search for the Spend Category
3. Specify your preferred **Supplier** if applicable*
4. Select the **Supplier Contract** if one applies. This field is only selectable after you have entered a supplier that has an active contract
5. Enter the **Quantity**, **Unit Cost** and **Unit of Measure** for the goods

   ***Note:*** *If you do not have a specific supplier designated, the RISD buyers use the* ***Unit Cost*** *as a maximum amount to spend. You will be notified if the item is not available within the maximum amount specified.*
6. Enter an optional **Memo**
7. Click **Add to Cart** and then click **OK**

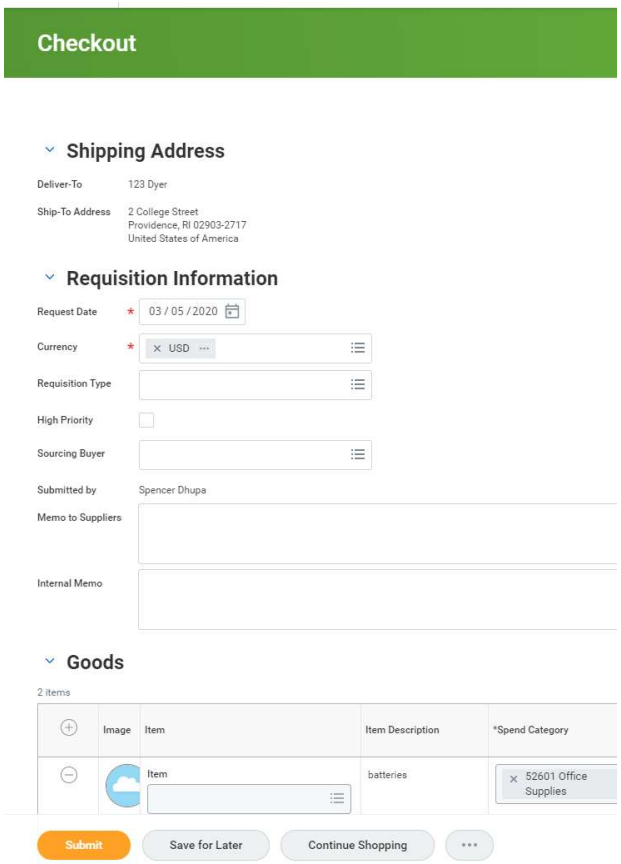
### If this is a Requisition is for Services

1. Enter the service **Description**
2. Indicate the **Spend Category** for the service
3. Specify your preferred **Supplier** if applicable*
4. Indicate a **Start** and **End Date**
5. Enter the **Extended Amount** for the service
6. Enter an optional **Memo,** describing the service or relevant details
7. Click **Add to Cart** and then click **OK**
8. Add additional requests to your cart or click the Shopping **Cart** in the upper right corner of the screen to continue to the checkout area

## Cart




1. Select Checkout if you do not need to make any changes to the items in your cart.
2. Select the View Cart to make any changes to the **Quantity** or **Description** fields as needed. Click **Delete** to remove an item
3. Click **Continue Shopping** to enter additional requisitions or click Checkout to finalize the requisition.

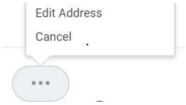


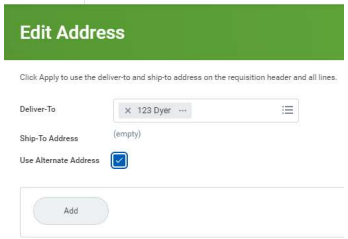

### Checking Out

Review the requisition information and make modifications to the goods and services information if needed.

### Shipping Address

1. Review the **Default Deliver-To** and **Default Ship-To Addresses**.
2. If you need to use an Alternate address, select the Edit Address option from the bottom of the screen.



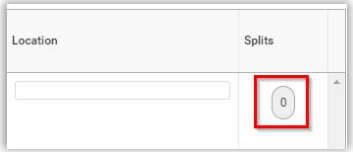



4. Select **Use Alternate Address** to add another address to the requisition
5. Click **Apply**

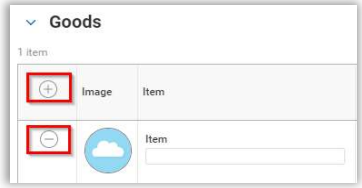
### Review the Goods and/or Services sections

1. The **Request Date** defaults to the current date. The date can be edited as needed
2. Check the **High Priority** check box if the requisition is time sensitive
3. Add a **Memo to Suppliers** or **Internal Memo** if applicable.
4. Enter the **Cost Center** if not already defaulted. You can search by cost center number or cost center name
6. Enter Additional Worktags as needed for Gift, Grant, Program, Project, or RISD Activity Codes

### Splits (optional)




7. If the requisition is being split, click the **Splits** icon
   a. Requisitions for goods can be split by either **Amount** or **Quantity**, Services are split by an **Amount.** Click **Done**
   b. Scroll across the line items to enter the split information:
      i. If splitting by an Amount, either the Percent or Amount must be specified If splitting by quantity, a Quantity must be specified. Enter a Memo if applicable
      ii. Enter the Cost Center
      iii. Enter additional Worktags as needed for Gift, Grant, Program, Project or RISD Activity Codes
      iv. Click Done




8. Use the **Add** and **Subtract** icons to manage the rows **Row**

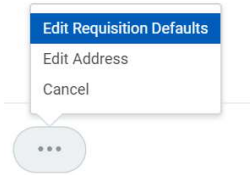
### Attachments (optional)

9. To add any attachments either **Drop** the files in the attachments area or click **Select Files**.
   ***Note:*** *it is highly recommended that you attach documentation detailing the items being requested so the buyers can source it correctly*

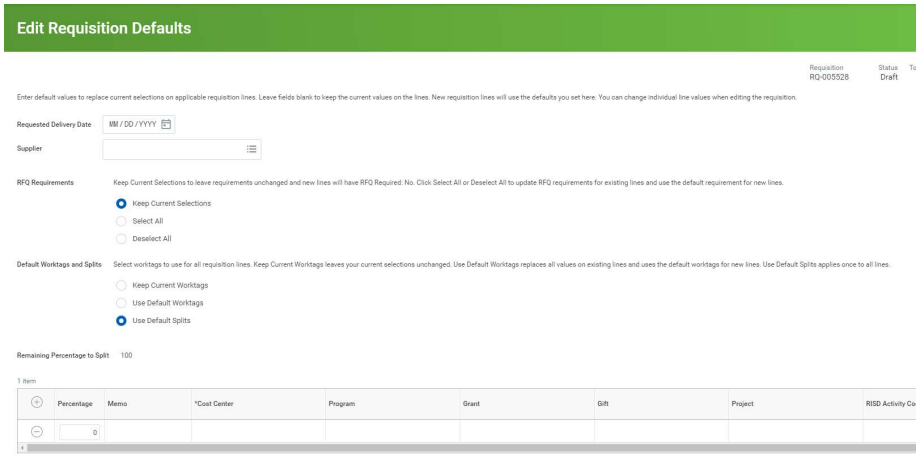
   After reviewing and making any additions, click **Submit,** which will route the requisition for approval.

### Edit Requisition Defaults (optional)

1. If you need to edit the requisition defaults, you can select the Edit Requisition Defaults option before you select submit.

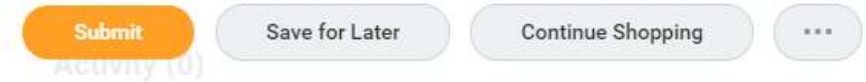



You can edit the requisition defaults for lines on the requisition. For examples, apply a split on all lines.



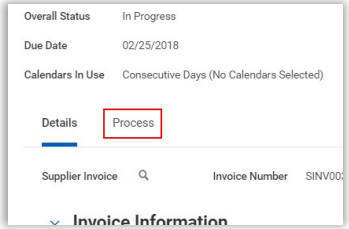

Submit on the Check Out screen

10. Select submit button when you want to send to approvals.




## VIEW THE PROCESS HISTORY

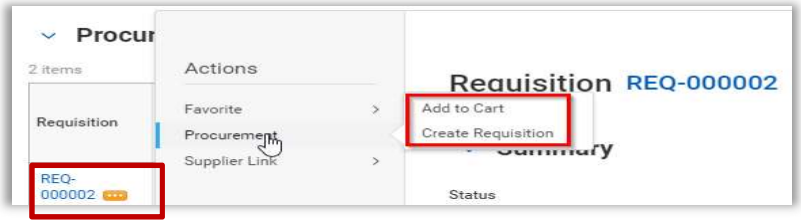
1. Navigate to the Workday **Inbox**
2. Click on the **Archive** tab
3. Search for the task
4. Events display as either **Successfully Complete**, or **In Progress**
5. Click on an **Event** to view more details and information about its routing
6. Click the **Process** tab
7. Displayed are the steps in the process that have been either completed, are not required based on the process rules, or are awaiting action from a worker
8. Click **Remaining Process** to view possible steps remaining in the process that may or may not be required based on the process rules




## MY REQUISITIONS REPORT

Requisitions that have been submitted can be located using the My Requisitions report

1. Enter ***My Requisitions Report*** in the **Search** bar and select the report
2. Company defaults. Enter any **filters** that can narrow the search or click **OK**
3. Requisitions display with type, amount, associated purchase order numbers, and request status
4. Using the **Related Actions** icon from the requisition, hover over the **Procurement** tab and select either **Add to Cart** to quickly add a good and/or service to your cart that you have purchased previously or select **Create Requisition** to create a new requisition




*Note: *The Create Supplier Request task is used to add suppliers for PCard, Requisitions/Purchase Orders, and Supplier Invoice Request transactions. All T&E Card transaction suppliers are added directly by epro@risd.edu. Please email epro@risd.edu for any hotel, car rental company, airline, airport, and travel city you need added.*