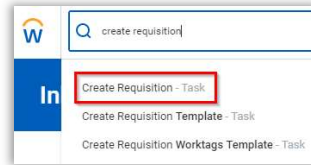


## CREATE A NEW PUNCH OUT REQUISITION

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



### Create Requisition

2. Review/Update any of the fields on this Create Requisition Screen.

Select which Requisition Type- Blanket PO or Goods/Services Purchase

Create Requisition

Company	*	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X Rhode Island School of Design</span> <span style="float: right;">...</span> </div>	?
Requester	*	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X Spencer Dhupa</span> <span style="float: right;">...</span> </div>	?
Currency	*	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X USD</span> <span style="float: right;">...</span> </div>	?
Deliver-To		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X 123 Dyer</span> <span style="float: right;">...</span> </div>	?
Ship-To	*	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X 2 College Street Providence, RI 02903-2717 United States of America</span> <span style="float: right;">...</span> </div>	?
Requisition Type		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;"></span> <span style="float: right;">...</span> </div>	?
Cost Center		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X ITS</span> <span style="float: right;">...</span> </div>	?
Program		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;"></span> <span style="float: right;">...</span> </div>	?
Grant		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;"></span> <span style="float: right;">...</span> </div>	?
Gift		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;"></span> <span style="float: right;">...</span> </div>	?
Project		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;"></span> <span style="float: right;">...</span> </div>	?
RISD Activity Code		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;"></span> <span style="float: right;">...</span> </div>	?
Additional Worktags		<div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X Function: Institutional Support</span> <span style="float: right;">...</span> </div> <div style="border: 1px solid #ccc; padding: 2px;"> <span style="background-color: #f0f0f0; padding: 2px;">X Fund: FD10 Operating</span> <span style="float: right;">...</span> </div>	?

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

### Shipping Address

3. 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.

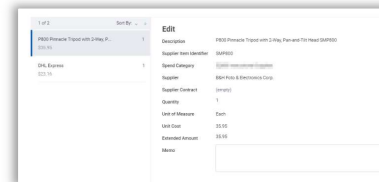
4. Update or add any additional Financial Worktags.
5. Click **OK**
6. Select **Connect to Supplier Website**
7. Click the supplier Connect from the list to navigate to the website.

### Connect to Supplier Website [external website]

8. On the supplier website, search and select the product or service to purchase. Once selected there will be an option to **Punch Out**. This will take you back to Workday.

### View Cart [Workday]

9. The item details should now auto populate required fields in Workday. Review the item(s) for accuracy and click Checkout



### Checkout

10. Click on **Review and Submit**.

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

Checkout

Shipping Address

Deliver-To

123 Dyer

Ship-To Address

2 College Street  
Providence, RI 02903-2717  
United States of America

Requisition Information

Request Date

03 / 05 / 2020

Currency

USD

Requisition Type

High Priority

☐

Sourcing Buyer

Submitted by

Spencer Dhupa

Memo to Suppliers

Internal Memo

Goods

2 Items

	Image	Item	Item Description	*Spend Category
		Item	batteries	52601 Office Supplies

Submit

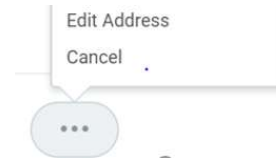
Save for Later

Continue Shopping

...

## 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.



Edit Address

Click Apply to use the deliver-to and ship-to address on the requisition header and all lines.

Deliver-To

123 Dyer

Ship-To Address

(empty)

Use Alternate Address

☒

Add

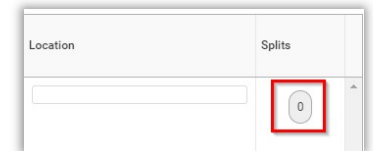
1. Select **Use Alternate Address** to add another address to the requisition
2. Click **Apply**

## 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
3. Enter Additional Worktags as needed for Gift, Grant, Program, Project, or RISD Activity Codes

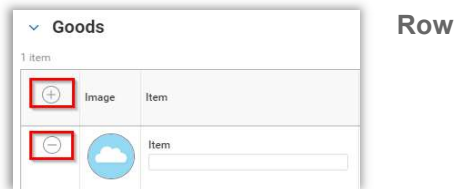
## Splits (optional)

4. 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

5. Use the **Add** and **Subtract** icons to manage the rows



### Attachments (optional)

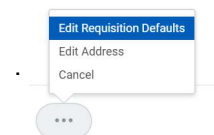
6. To add any attachments either **Drop** the files in the attachments area or click **Select Files**.

**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)

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

7. Click **Submit**. The requisition will route to cost center approver(s) for review.

## TIPS FOR PUNCH-OUT

1. WB Mason does desktop delivery. When checking out, select **Use Alternate Address** and add your office address

2. For Amazon, you will need to set up an Amazon Business Account if you do not have one already. Reference the Amazon Business First Time Set-up guide for instructions on the [workday.risd.edu](http://workday.risd.edu) site.