## Create Purchase Requisition Overview

This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper** through creating a requisition. By the end of this QRG, you will be able to successfully create a purchase requisition in Workday to procure goods and supplies as per UVA's need. You will able be able to place orders for these goods on the UVA Marketplace integrated in Workday. You will also be able to successfully create an intercompany purchase requisition, which is a requisition for a UVA company other than your own home company.

## Table of Contents

## Procedure: Create Purchase Requisition

On the Workday **Home** screen:

1. Type **Create Requisition** in the search field.
2. Select **Create Requisition** from the Search Results.



On the **Create Requisition** screen:
3. Complete the following required fields:
   - **Requester** – auto-populates based on user. If the requisition is being created for someone else, change the Requester to the appropriate individual. NOTE: This is the <u>only</u> place to change the Requisitioner. If a change from the default is needed it <u>MUST</u> be done here.
   - **Company** – auto-populates based on user.
   - **Currency** – auto-populates to USD.

- **Requisition Type** – select **Contract Request** when Spend Category Buyer review is needed, otherwise select **Standard.**
- **Deliver To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Deliver To location as needed.
- **Ship To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Ship To location as needed.

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| **NOTE** | Worktag information may be added at this time, or once the requisition has been sent back to Workday from the UVA Marketplace. However, if you would like the Worktag information to apply to ALL lines, it will save time to enter this information on this Header level. |

4. Select **OK** to proceed.

On the second **Create Requisition** screen:

5. Review the Requisition Instructions by selecting the **Purchasing Basics** link.
6. Select **Connect to Supplier Website** to proceed.

**Create Requisition**

| Company | Requester | Currency | Requisition Type |
|---|---|---|---|
| The University of Virginia's College at Wise | Amanda Grace Hughes | USD | 1. Standard |

˅ **Instructions**

**Requisition Instructions**

Before you process your requisition, please refer to the Purchasing Basics here. If you have questions or need additional assistance, please call 434-924-4212.
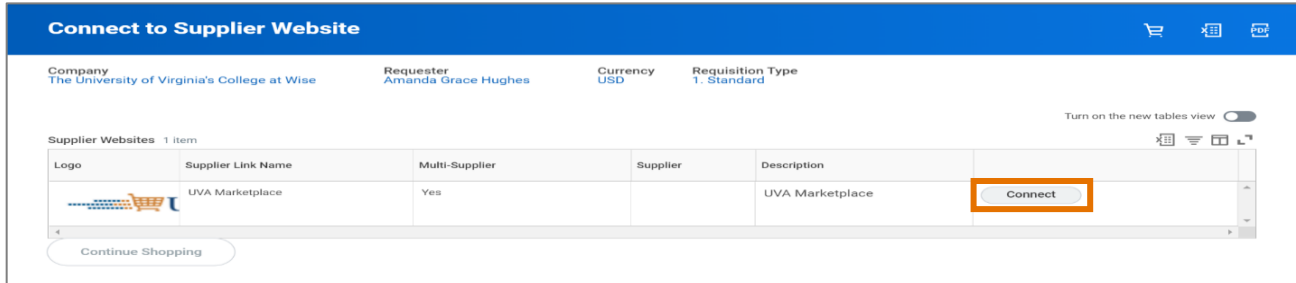
https://procurement.virginia.edu/purchasing/purchasing-basics

˅ **Select an Option**

Connect to Supplier Website

Use this link to connect to the Jaggaer Marketplace to view the available catalog and non-catalog items.

On the **Connect to Supplier Website** screen:

7. Select **Connect** to navigate to the UVA Marketplace.



| | QRG links to help you navigate and shop in the UVA Marketplace can be found at the end of this QRG |
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After Returning Cart to Workday, on the Workday **View Cart** screen:

8. Review the item details on the screen and write a memo to describe your purchase.
9. Select **Checkout.**

On the Workday **Checkout** screen:

In the **Requisition Information Section**:

10. Review the details added previously and edit as needed.

| | Although not required, it is advisable to type a **Memo to Supplier** and **Internal Memo** to be able to reference your purchase requisitions easily in the future. |
|---|---|

In the **Goods** section:

11. If the Worktag information was not entered prior to entering the UVA Marketplace, complete the following required fields for **each of the line items bought:**
    - **Company** – auto-populates based on user**.**
        - **For an Intercompany Requisition request**, change the default value and select the applicable company responsible for the requisition.
    - **Spend Category** – select the spend category relevant to your purchase from the drop-down list. (may auto-populate depending on the item)
    - **Ship-To Address** – auto-populates based on user
        - **For an Intercompany Requisition request**, change the ship-to-address as needed.

- **Gift, Grant, Designated,** or **Project** – if not done on the header level, enter Worktag in one of the four options
- **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate based on the Gift, Grant, Designated, or Project Worktag).
- **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user or the Gift, Grant, Designated, or Project Worktag)
- **Function** – select the function relevant to the purchase

In the **Attachments** section:

12. Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents.

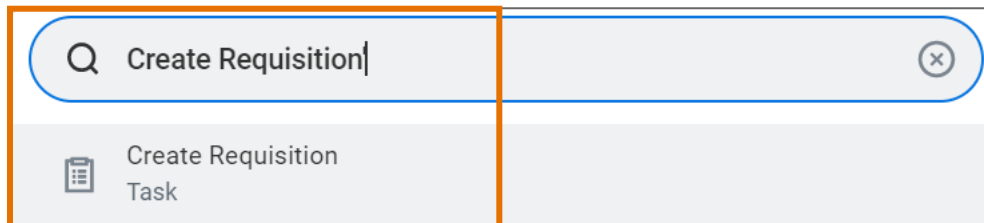| | |
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| **NOTE** | Adding attachments to your requisition is optional unless the requisition type is "Contract Request" or if it's a non-catalog purchase over $10,000. In these cases, an attachment is required. |

13. Select **Submit** to submit your requisition.

You have successfully completed this task. It will now be routed based on the configuration.

## Procedure: Create Purchase Requisition with Splits

On the Workday **Home** screen:

1. Type **Create Requisition** in the search field.
2. Select **Create Requisition** from the Search Results.



On the **Create Requisition** screen:

3. Complete the following required fields:
   - **Requester** – auto-populates based on user. If the requisition is being created for someone else, change the Requester to the appropriate individual. NOTE: This is the only place to change the Requisitioner. If a change from the default is needed it MUST be done here.
   - **Company** – auto-populates based on user.
   - **Currency** – auto-populates to USD.

- **Requisition Type** – select **Contract Request** when Spend Category Buyer review is needed, otherwise select **Standard.**
- **Deliver To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Deliver To location as needed.
- **Ship To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Ship To location as needed.

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| **NOTE** | Worktag information may be added at this time, or once the requisition has been sent back to Workday from the UVA Marketplace. However, if you would like the Worktag information to apply to ALL lines, it will save time to enter this information on this Header level. |

4. Select **OK** to proceed.

On the second **Create Requisition** screen:

5. Review the Requisition Instructions by selecting the **Purchasing Basics** link.
6. Select **Connect to Supplier Website** to proceed.

**Create Requisition**

| Company | Requester | Currency | Requisition Type |
|---|---|---|---|
| The University of Virginia's College at Wise | Amanda Grace Hughes | USD | 1. Standard |

⌄ **Instructions**

**Requisition Instructions**

Before you process your requisition, please refer to the Purchasing Basics here.  If you have questions or need additional assistance, please call 434-924-4212.
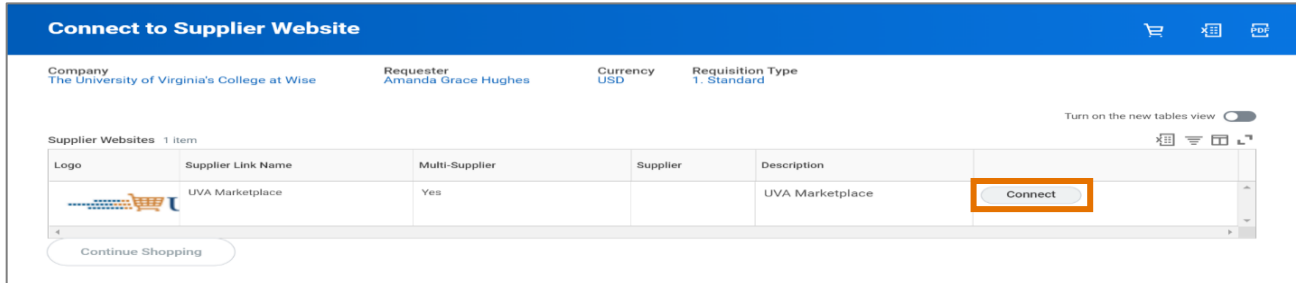
https://procurement.virginia.edu/purchasing/purchasing-basics

⌄ **Select an Option**

Connect to Supplier Website

Use this link to connect to the Jaggaer Marketplace to view the available catalog and non-catalog items.

On the **Connect to Supplier Website** screen:

7.  Select **Connect** to navigate to the UVA Marketplace.



| | | |
|---|---|---|
| **NOTE** | QRG links to help you navigate and shop in the UVA Marketplace can be found at the end of this QRG | |

After Returning Cart to Workday, on the Workday **View Cart** screen:

8.  Review the item details on the screen and write a memo to describe your purchase.
9.  Select **Checkout.**

On the Workday **Checkout** screen:

In the **Requisition Information Section**:

10. Review the details added previously and edit as needed.

| | |
|---|---|
| **NOTE** | Although not required, it is advisable to type a **Memo to Supplier** and **Internal Memo** to be able to reference your purchase requisitions easily in the future. |

In the **Goods** section:

11. If the Worktag information was not entered prior to entering the UVA Marketplace, complete the following required fields for **each of the line items bought:**
    - **Company** – auto-populates based on user**.**
        - For an Intercompany Requisition request, change the default value and select the applicable company responsible for the requisition.
    - **Spend Category –** select the spend category relevant to your purchase from the drop-down list. (may auto-populate depending on the item)
    - **Ship-To Address** – auto-populates based on user
        - For an Intercompany Requisition request, change the ship-to-address as needed.

12. Select the **Split** button to split the selected Line Item which will tag the line item to more than 1 Worktag.



In the Splits pop-up:

13. Select **(+) Add** to add another line in the Split table. (To remove the line from the Split table, select the **(-)** icon)

14. For each line, complete the following required fields in the table:
    - **Percent or Amount** – split the total percentage/amount of the Line Item into the required number of lines.
    - **Gift, Grant, Designated,** or **Project** – if not done on the header level, enter Worktag in one of the four options
    - **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate based on the Gift, Grant, Designated, or Project Worktag).
    - **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user or the Gift, Grant, Designated, or Project Worktag)
    - **Function** – select the function relevant to the purchase

| NOTE | The total amount must be accounted for to proceed, as shown in the Amount Split and the Remaining Amount to Split lines. |
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In the **Attachments** section:

15. Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents.

| NOTE | Adding attachments to your requisition is optional, *unless* the requisition type is "Contract Request" or if it's a non-catalog purchase over $10,000. In these cases, an attachment is required. |
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16. Select **Submit** to submit your requisition.

You have successfully completed this task. It will now be routed based on the configuration.

## Procedure: Use Requisition Worktags Template While Creating Requisitions

When creating a requisition, you can use a requisition worktags template you have created to automatically populate the worktags instead of selecting worktags manually. This is useful for frequently ordered items, as you can save the worktags string in a template and use it every time you create a requisition for those items. For instructions on how to create a requisition worktags template, review the Create Requisition Worktags Template QRG.

After checking out from UVA Marketplace and returning the cart to Workday, you will be directed to the Workday **View Cart** screen where you will review the items details, write a memo, and check out to arrive at the Workday **Checkout** screen.

On the Workday **Checkout** screen, ensure that the **Requisition Type** field is populated.

In the **Goods** section, ensure that the **Spend Category** field is populated.

1. Instead of adding the Worktags for each of the line items, use the **Related Actions** menu at the bottom of the screen and select **Edit Requisition Defaults.**
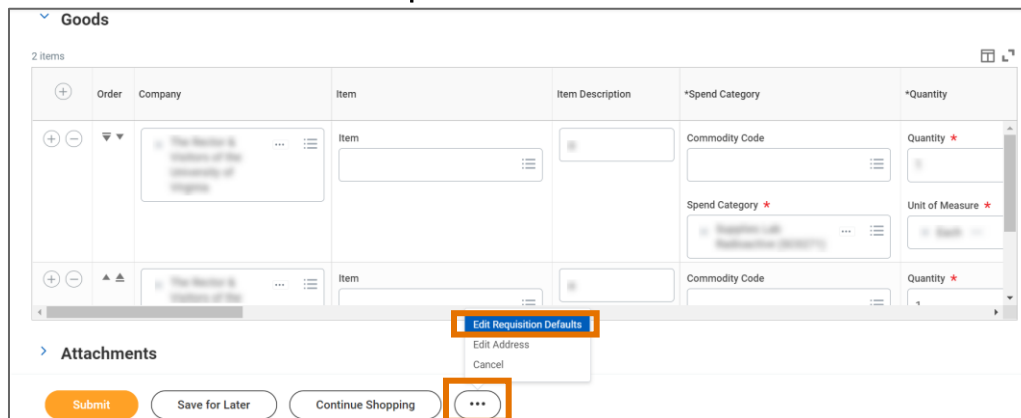


On the **Edit Requisition Defaults** screen:

In the **Default Worktags and Splits** section:

2. Select **Copy from Worktags Template** radio button and the select the appropriate option as explained below:

- **Worktags** - if you want to use a worktags template you previously created, select this option from the **Copy from Worktags Template** dropdown and then select the name of the requisition worktag template you wish to use**.**
- **Split Allocations** – if you want to use a split allocations worktag template you previously created, select this option and then select the name of the split allocation requisition worktag template**.**

| NOTE | If you have not created a requisition worktag template, you can select one of the following radio buttons:<br><br>• **Keep Current Worktags:** leaves your current worktags selections unchanged.<br>• **Use Default Worktags:** replaces all values on existing lines and uses the default Worktags for new lines.<br>• **Use Default Splits:** applies default split once to all the lines. |
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| NOTE | You can only use the requisition worktags templates that you have created yourself in Workday. Templates created by other users cannot be used. |
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3. Select **Apply**.
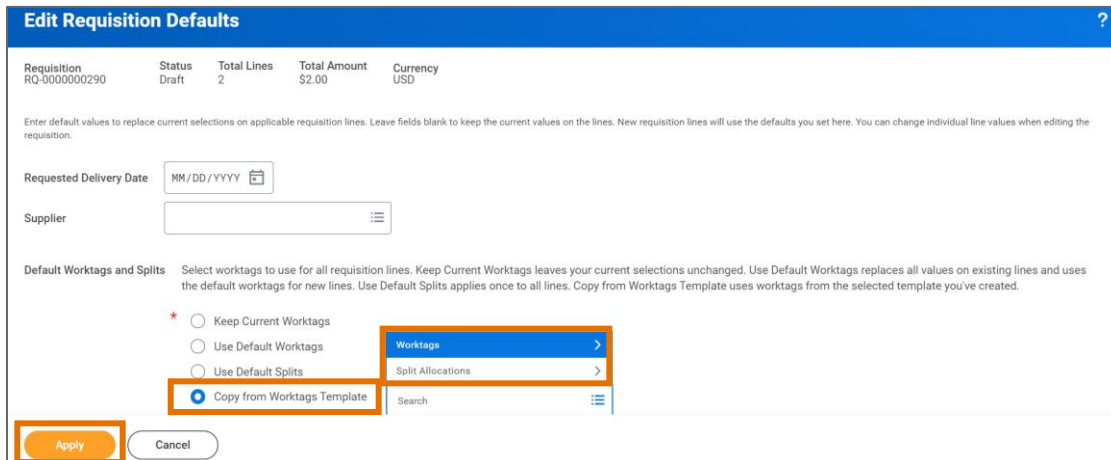


Your **Goods** lines will automatically update with the worktags according to the requisition worktags template selected.

## QRG Links for UVA Marketplace

Use the following QRG links to help you navigate and shop in the UVA Marketplace:
- [Navigating the UVA Marketplace](#)
- [Understanding Vendors in the UVA Marketplace](#)
- [Using Icons and Helpful Tips](#)
- [Product Search in the UVA Marketplace](#)
- [Shopping with Hosted Catalog Suppliers](#)
- [Comparing Products](#)
- [Shopping with Punchout Catalog Suppliers](#)
- [Creating Non-Catalog Item Orders](#)
- [Creating a Quick Order](#)
- [Working with Favorites in the UVA Marketplace](#)