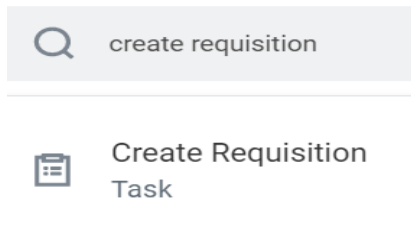


Create a Requisition in WD

- 1) Logon to Workday
- 2) Enter "Create Requisition" in the search field (or just type in the first 4 letters of each word). The "Create Requisition Task" will appear below.



- 3) Select Create Requisition task and the "Create Requisition" page will appear.

A screenshot of the "Create Requisition" form. The title "Create Requisition" is displayed in white text on an orange background at the top. Below the title, the form contains several fields, each with a dropdown menu and a red asterisk indicating a required field:

- Company ***: Brigham Young University-Hawaii
- Requester ***: Hilda Kajiyama (H0012238)
- Currency ***: USD
- Deliver-To**: BYU-Hawaii > Food Services Director
- Ship-To ***: 55-220 Kulanui Street Laie, HI 96762 United States of America
- Project**: (Empty)
- Cost Center**: H:CC365000 Food Services Administration
- Additional Worktags**: Fund: 20 Auxiliaries (with a faded "Program: Auxiliary Enterprises" option below it)

At the bottom of the form, there are two buttons: "OK" (orange) and "Cancel" (grey).

All the fields should be automatically populated including the Cost Center, Fund, and Program.

Check all the information populated to be correct. If not, contact the Workday Administrator at Financial Services for changes that need to be made.

- 4) Click OK at the bottom of the page.
- 5) From "Select an Option" -- Click "Request Non-Catalog items".

Create Requisition

Instructions

Instructions
REQUISITION INSTRUCTIONS

Before you process your requisition, please refer to the Company Procurement Policy here

Quick reference guides can be found here to assist with your request.

Select an Option

[Search Catalog](#)

Onsite Stores and Receiving Catalog

[Request Non-Catalog Items](#)

Add a good or service that is not in the catalog

- 6) The "Request Non-Catalog Items" page will appear. The request can be for "Goods" or "Service" or both. Populate all the required fields on "Request Details".
Select "Request Goods" if the purchase is for Goods and enter the Item Description of the item you are buying.
Select "Spend Category" from the dropdown box or you can type in a "search" word.
Select "Supplier" from the dropdown box or type in the name.

Request Non-Catalog Items

Actions

Requisition Currency * X USD ...

Non-Catalog Request Type

Request Goods

Request Service

Goods Request Details

Item Description * Kitchen equipment

Supplier Item Identifier

Spend Category * X H:Food Services Administrative Expense Allocation ...

Supplier X Bargreen Ellingson of Hawaii Inc ...

- 7) Enter the Quantity, Unit Cost, Unit of Measure and Memo (if needed). Unit of measure can be found from the dropdown box. Click "Add to Cart" when all the required fields are done.

Supplier	<input type="text" value="X Bargreen Ellingson of Hawaii Inc"/>
Supplier Contract	<input type="text"/>
Quantity	* <input type="text" value="2"/>
Unit Cost	<input type="text" value="1,000.00"/>
Unit of Measure	* <input type="text" value="Each"/>
Extended Amount	2,000.00
Memo	<input type="text" value="For <u>Seasider</u> kitchen"/>

Add to Cart

Continue Shopping ▼

Cancel

8) Repeat the same processes for Service. Select "Request Service" if the purchase is for service, when Receiving is not required.

Enter the Item Description of the Service you are requesting.

Follow the same steps as for "Goods" and "Add to Cart" when done.

"Goods and Service can be done on the same requisition request" if the purchase is for both and to the same supplier.

Non-Catalog Request Type

- Request Goods
- Request Service

Service Request Details

Description *	<input type="text" value="Installation of equipment"/>
Spend Category *	<input type="text" value="H:Food Services Administrative Expense Allocation"/>
Supplier	<input type="text" value="Bargreen Ellingson of Hawaii Inc"/>
Supplier Contract	<input type="text"/>
Start Date	<input type="text" value="11/01/2020"/>
End Date	<input type="text" value="11/30/2020"/>
Extended Amount	<input type="text" value="1,500.00"/>
Memo	<input type="text" value="For installation of kitchen equipment at the Seasider"/>

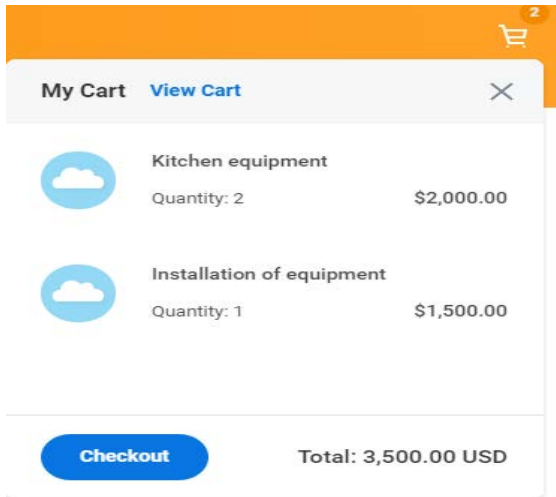
Add to Cart

Continue Shopping ▾

Cancel

9) Click the "Checkout Cart" on the Upper Right Hand Corner when all the line items are entered.





- 10) Review all the items on “Checkout” and make sure all the information entered is correct. Enter the name of the Sourcing Buyer for your Purchase. If no Sourcing Buyer is entered here, your requisition will go to all 3 buyers’ inbox.

Checkout

Shipping Address

Deliver-To BYU–Hawaii > Food Services Director

Ship-To Address 55-220 Kulanui Street
Laie, HI 96762
United States of America

Requisition Information

Request Date * 10/06/2020

Currency *

Credit Card

Sourcing Buyer

Submitted by Hilda Kajiyama (H0012238)

Internal Memo

Goods

1 Item

Item	Item Description	*Spend Category	*Quantity	Unit Cost	Extended Amount	Deliver-To	*Ship-To Address
<input type="text"/>	Kitchen equipment	<input type="text"/>	Quantity * 2	1,000.00	2,000.00	<input type="text"/>	<input type="text"/>
Purchase Item			Unit of Measure * <input type="text"/>				

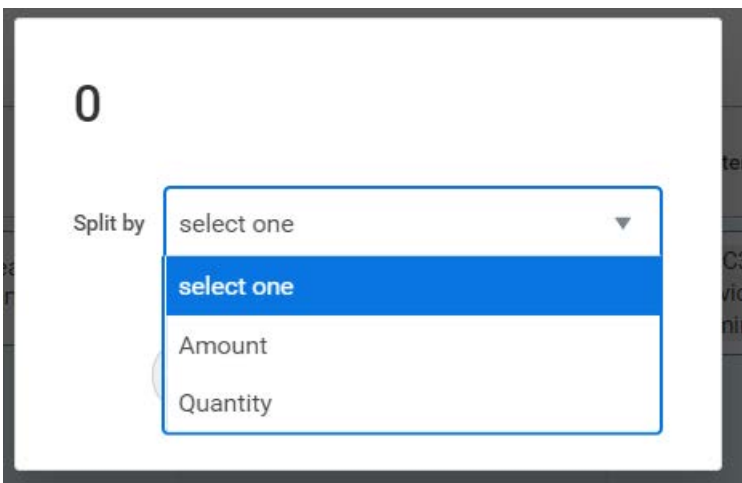
Goods

1 Item

Ship-To Contact	Requested Delivery Date	Supplier	Supplier Item Identifier	Memo	Project	*Cost Center
<input type="text"/>	<input type="text"/>	Supplier <input type="text"/>	<input type="text"/>	For Seaside kitchen	<input type="text"/>	<input type="text"/>
		Supplier Contract <input type="text"/>				

*Additional Worktags	Splits
<input type="text"/> <input type="text"/>	0

(Your purchase can be paid from multiple Cost Centers by using the "Splits". It allows you to split your charges by quantity or amounts and charge to different Cost Centers.



0

Split by: Quantity

Kitchen equipment 2 0
Item Quantity Split Remaining Quantity to Split

2 items

	Quantity	Amount	Memo	Project	*Cost Center	*Additional Worktags
+	1	1,000.00			x H:CC147000 Travel Operations	x Fund: 10 General Fund x Program: Institutional Support
-	1	1,000.00			x H:CC365000 Food Services Administration	x Fund: 20 Auxiliaries x Program: Auxiliary Enterprises

Done Cancel

Services

1 item

Item	Description	*Spend Category	Extended Amount	Date	Deliver-To	*Ship-To Address	Ship-To Contact
	Installation of equipment	x H:Food Services Administrative Expense Allocation	1,500.00	Start Date: 11/01/2020 End Date: 11/30/2020	x BYU-Hawaii Food Services Director	x 55-220 Kulanui Street Laie, HI 96762 United States of America	x Hilda Kajiyama (H0012238)

Ship-To Contact	Supplier	Memo	Project	*Cost Center	*Additional Worktags	Splits
x Hilda Kajiyama (H0012238)	Supplier: x Bargreen Ellingson of Hawaii Inc Supplier Contract	For installation of kitchen equipment at the Seaside		x H:CC365000 Food Services Administration	x Fund: 20 Auxiliaries x Program: Auxiliary Enterprises	0

11) Attachment is required when submitting a requisition. Attach quotes, invoices, or any pertinent information for the buyer to process the Purchase Order.

Attachments

Drop files here

or

Select files

> Attachments



12) Click "Submit" and the requisition is done. Your requisition will be routed to your Cost Center Manager for approval.

You have submitted
Requisition: H:REQ-102474, Requester: Hilda Kajiyama (H0012238), Date: 10/06/2020, Amount: \$3,500.00 [Actions](#)

Up Next



David Keala (H0021082)

Approval by Cost Center Manager (All)
Due Date 10/08/2020

Details and Process

For [H:REQ-102474](#)

Overall Process [Requisition: H:REQ-102474, Requester: Hilda Kajiyama \(H0012238\), Date: 10/06/2020, Amount: \\$3,500.00](#)

Overall Status In Progress

Due Date 10/13/2020

Details [Process](#)

> **Shipping Address**

> **Information**

∨ **Goods**

13) You will receive a notification when your requisition is approved.

How to look up your requisition to view or edit?

- 1) Type in “My Requisition” in the search field. You can search by any of the available fields.

 X

Search Results

Categories

Common

Assets

Banking

Endowments

Search Results 3 items

Tasks and Reports

[My Requisitions](#)

View each requisition, date, amount, suppliers, purchase orders, and status. Enables you to track the progress of your requisitions or edit in-progress requisitions. Required prompt: none Optional prompt: none

My Requisitions

Company	<input type="text" value="x Brigham Young University-Hawaii ..."/>
Requisition	<input type="text"/>
Status	<input type="text"/>
Requisition Type	<input type="text"/>
Requesting Inventory Site	<input type="text"/>
Document Date On or After	<input type="text" value="09/06/2020"/>
Document Date On or Before	<input type="text" value="MM/DD/YYYY"/>
Supplier	<input type="text"/>
Spend Category	<input type="text"/>
Item	<input type="text"/>
Project	<input type="text"/>
Purchase Order	<input type="text"/>

Exclude Closed

2) Select the requisition you want to view or edit and select the action from the "Actions" field.

← My Requisitions



Create Requisition

Selection Criteria

Company [Brigham Young University-Hawaii](#)

Document Date On or After 09/06/2020

Exclude Canceled Yes

Exclude Closed Yes

Procurement Requisitions

6 Items



Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders	Request Status	Memo to Suppliers	Internal Memo	Edit Requisition
H REQ-102474			10/06/2020	3,500.00	USD	Bargreen Ellingson of Hawaii Inc		In Progress			Edit Requisition
H REQ-102473			10/02/2020	671.80	USD	Compliance Control Inc.	H-PO-102502	Successfully Completed			
H REQ-102462			09/28/2020	834.00	USD	Compliance Control Inc.	H-PO-102501	Successfully Completed			
H REQ-102444			09/23/2020	2,844.13	USD	Aglysys NV, LLC	H-PO-102500	Successfully Completed			
H REQ-102438			09/22/2020	1,732.98	USD	Oahu Fire Protection	H-PO-102498	Successfully Completed			
H REQ-102439			09/22/2020	673.00	USD	Commercial Plumbing, Inc.	H-PO-102499	Successfully Completed			

Actions

- Requisition ⌵
 - Edit
 - Add More
 - Cancel
- Favorite >
- Integration IDs >
- Procurement >
- Supplier Link >

Requisition

Status

Company

Worker

You can edit, add more line items, or cancel your requisition before the approval is done. You will not be able to make changes once the approval is done by your Cost Center Manager unless he sends it back to you to edit before approving.