Create Requisition

The Create Requisition tip sheet is for all employees.

College Specific Considerations

CCC	• Manager's manager approval is required. • Approval by Finance Executive is required unless initiated by a Finance Executive.
CNM	• Additional grants accountant approval is required for grant, gift, or project transactions**.** • CNMI requires approval by Procurement Operations Lead if the request is larger than $25,000. • Fleet approval is required if the spend category is vehicles. • The Accounts Payable Operations Lead must review and approve if the request does not go through a change order.
NNMC	• Accountant approval is required if the requisition is not a grant, gift, or project transaction. • Approval by Finance Executive is required unless initiated by a Finance Executive.
SFCC	• Manager's manager approval is required. • Approval by Finance Executive is required unless initiated by a Finance Executive.

Requisitions Application

The Workday Requisitions application enables you to easily create requisitions. You can check the status of recent open and completed requisitions and review downstream transactions.

The application enhances the employee experience by giving users the ability to submit requisitions using all supported ordering methods while also providing visibility into the procure-to-pay process.

1. On the Workday home page, select the **Menu**.
2. Select **Add Apps**.
3. In the Add Apps box, type "**Requisitions**."
4. From the list of apps, select **+** next to Requisitions.
5. Select **Back to Menu**. The Requisitions application now displays in the Menu.

Requisition Defaults

Use the following steps to set your requisition defaults.

1. From the Workday home page, select the **Menu**.
2. Select the **Requisitions** application.
3. Select the in the Requisition Details card to set the default fields such as **Requesting for**, **Company**, **Requisition Type**, **Ship-To Address**, and **Currency**.
4. Select **Save**.

Create a Requisition

1. From the Workday home page, select the **Menu**.
2. Select the **Requisitions** application.
3. In the Requisition Details section, select **Start Requisition**.
4. In the What do you need to order? section, type a description of the item you want to requisition.
5. In the What type of order is it? section, choose a **Spend Category**,
6. Select whether you are requisitioning **Goods** or a **Service**.
7. In the What is the quantity and cost? section, enter the **Quantity**, **Unit of Measure**, and **Price**.
8. In the **Other details to add** section, add **Supplier** information.
9. Select **Add to Cart**. The My Cart pop-up displays in the upper-right corner.
10. In the My Cart pop-up, select **Checkout**.
OR
Select the **View Cart** icon > **Checkout**.
11. Review the requisition information. Under the **Goods** or **Services** section, scroll over to the **Entity** field and select the college the requisition is for.
12. If an Alert displays, select it to view what additional information is required. For example, an Attachment may be needed.

NOTE: Location must be entered in the **Additional Worktags** column if the item exceeds $5000. Location refers to where the asset will be delivered or installed.

13. Select **Submit**. Your requisition displays on the Requisitions page under the **Open** tab and automatically routes according to the approval processes.

What's Next?

Once the required approvals have taken place, the requisition routes to a Buyer to add details to the order and issue the purchase order to the supplier.