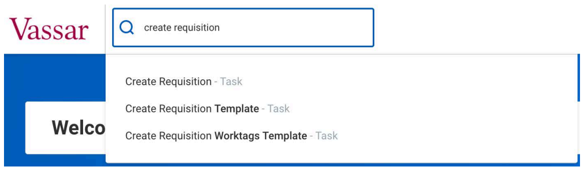
Creating a Blanket Order

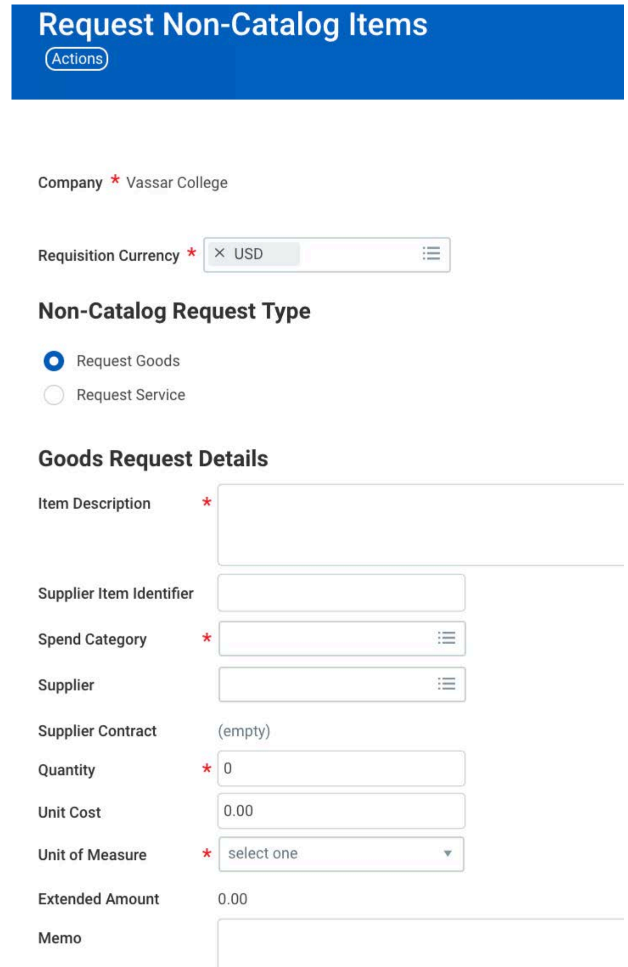
Blanket Orders

The Purchasing office issues a Blanket Order to facilitate repeated purchases from a business over a defined period of time. The order remains open throughout that period and replaces the need for a specific purchase order tied to each transaction.

1. Type "Create Requisition" in the Workday search box and click on the link that is listed.



2. In the **Requisition Type** field, choose **Blanket PO**.
3. Click **OK**.
4. Click **Request Non-Catalog Items**.
5. Under **Non-Catalog Request Type** click **Request Service**.
6. Type a description in the **Item Description** field (e.g. "blanket order for trash removal").
7. Select a category from the **Spend Category** menu. (*Tip: formerly "account code" in Banner.*)
8. Select a supplier from the **Supplier** menu.
9. Select current date in **Start Date** field.
10. Select June 30 of the new fiscal year in **End Date** field.
11. In the **Extended Amount** field specify dollar amount to encumber in the blanket order for the whole fiscal year.
12. Click **Add to Cart**, then **OK**.



13. Click on the image of the cart in the upper right corner to check out.

14. Click **Checkout**.

15. Review **Shipping Address** screen. If accurate, click **Next**.

16. Review **Information** screen. If accurate, click **Next**.

17. On the **Attachments** screen, add any relevant files or documents (e.g. quotes, contracts, etc.) by dragging and dropping the file(s) into the box or by clicking **Select files** and browsing for them on your computer. Click **Next** when done.

18. In the table under the **Services** header, scroll across to the right to find three accounting fields and fill them in: **Fund**, **Cost Center**, **Function**.

19. In the **Custom Fin Worktags for Spend** field, choose **Custom Fin Worktags for Spend** from the menu, then **Blanket PO**.

20. Click **Submit** to submit your requisition. You will see the name of the person who next needs to approve the requisition.