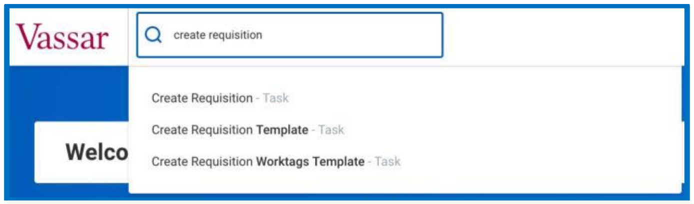
Creating a Requisition for a Supplier Website Purchase ("Punch Out")

Creating a "Punch Out" Requisition

1. Type **"Create Requisition"** in the Workday search box and click on the Create Requisition Task.



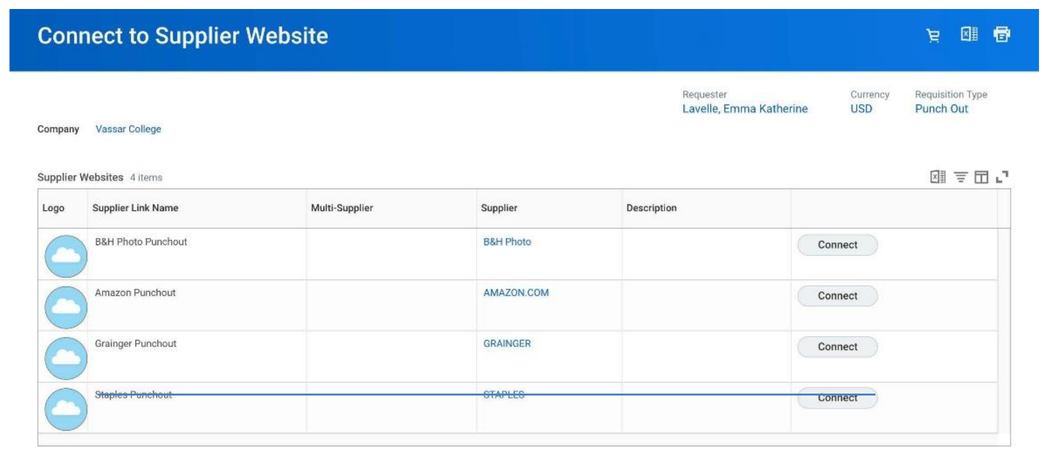
1. In the **Requisition Type** field, click **Punch Out**, then click **OK**.

2. The Requisition will auto-populate with your name, address and worktags. Review the information and make any necessary changes.

2. Click **Connect to Supplier Website**.

When using Amazon for the first time via Workday, follow steps to establish an Amazon Business Account.

3. Click on relevant **Connect** button to link to a supplier's website.
4. Complete and submit order. Once order is completed on supplier's site you are returned to Workday. *Note only for Amazon orders: Before you are returned to Workday, you will be prompted to enter P-Card information.*
5. Click **Checkout**.
6. On the "Shipping Address" page, the **Default Ship-To Address** field should automatically display "124 Raymond Avenue, Poughkeepsie, NY, 12604".
7. Review **Information** screen.
8. Attachments aren't needed on "punch out" orders. Click **Next**.
9. On the "Review and Submit" page, under the **Goods** header fill in the **Spend Category** field. Then scroll across to the right to fill in accounting fields: **Fund**, **Cost Center**, **Function**, use **Additional Worktags** field for **Gift, Grant, Project, Program and Event**. *Note: Follow all of these steps for each line item in the purchase.*
10. Click **Submit** to submit your requisition. You will see the name of the person who next needs to approve the requisition.



Using a worktag in a requisition

Expenditures supported by a grant, project, gift, or endowment will need to be referenced with an additional worktag, which can be selected in the **Additional Worktags** field.

1. When creating a requisition, the first screen is where all budget information is added.

2. Click in the **Additional Worktags** field and then click the menu icon. to search or enter the worktag number.

3. Once the **Gift**, **Grant**, or **Project** is entered, the rest of the budget numbers will update to the worktags that are attached to the additional worktag (do not change the default tags on an additional worktag).

Splitting a budget in a requisition

Goods requisitions can be split by quantity or amount. Service requisitions can only be split by amount.

1. When creating a requisition, on the **Review and Submit** screen, scroll right in the **Goods** table until you see the **Splits** field.

2. Click the zero in the **Splits** field.

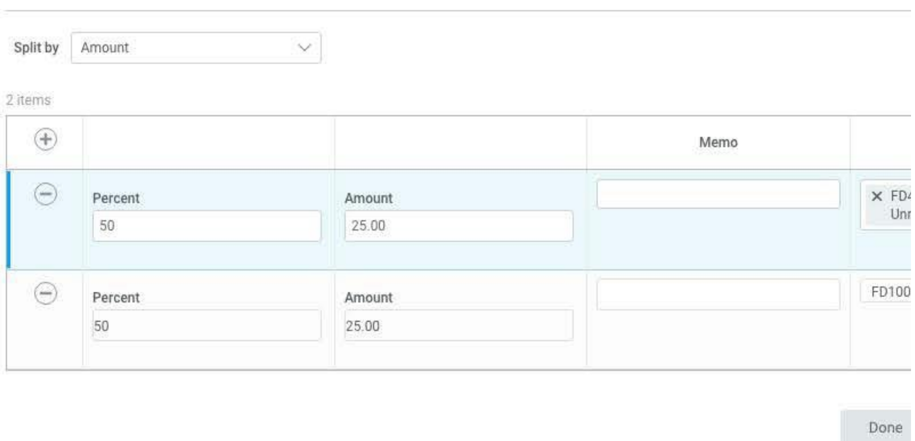
3. Complete **Split By** field. You can split by **Amount** or **Quantity**.

4. Click the **+** sign to start the split.

5. Choose the percent or the amount.

6. Edit the **Fund**, **Cost Center**, and **Function** fields as needed to reflect the categorization of the the expenditure.

7. Click **Done** to finalize the split.



Find a Requisition in Draft Status

There are two ways you can search for a Requisition by status.

1. Go to your **My Requisitions** application, click it and it will list your requisitions and the current status.
2. You can also type **My Requisitions** in the Workday search bar.
3. On the next screen click **Status** and select **Draft.**
4. Change the **Document Date On or After** to the first day of the fiscal year, 07/01/2019.
5. Unclick **Exclude Canceled**.
6. Unclick **Exclude Closed.**
7. Click **OK.**

How to Edit a Requisition

Requisitions can also be Edited.

1. Go to **My Requisitions** application on your home screen.
2. Click the requisition you want to edit.
3. From the Actions button go to **Requisition** and click **Edit**.

4. Make your changes to the requisition.
5. Click **Submit**.