

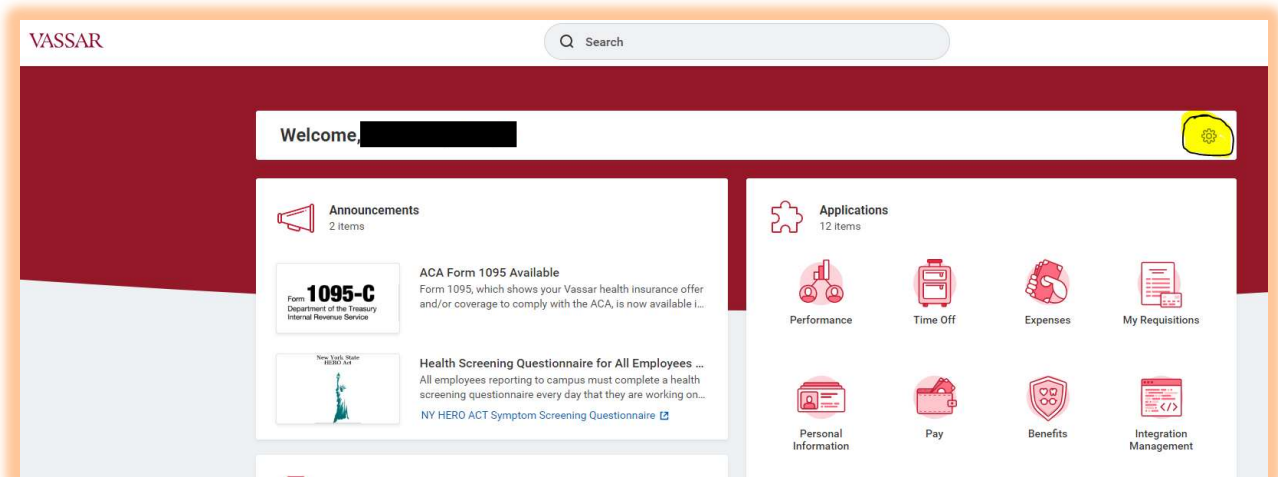
WD2022R1

## Requisitions Worklet

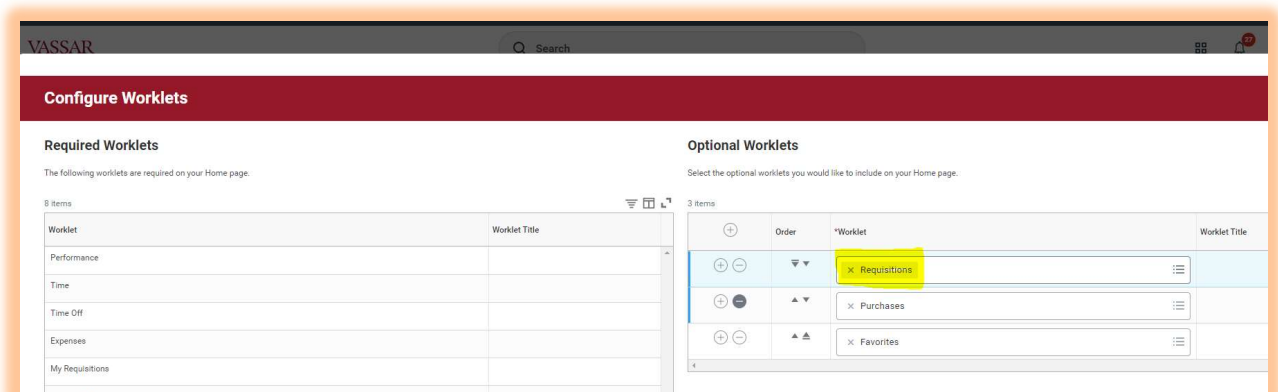


### Adding the Worklet to your homepage

1.) On your home page, click on the gear icon (highlighted below).



2.) On the right under *Optional Worklets*, add a row and enter "Requisitions." See below. Then hit OK at the bottom of the screen.



## Inside the Worklet

Below is a look at the inside of the new worklet.

This worklet differs from the My Requisitions worklet by showing the user requisitions which they created for themselves or for another worker. The My Requisitions worklet only allowed the user to view requisitions which they were listed as the requestor. Off of this dashboard, the user may:

- a.) View all of their requisitions on one dashboard.
  - a. NOTE: Workday limits the output to the last 100 requisitions. To narrow down the search, the user can utilize the *Edit Filters* button on the top right of the box labeled **Requisitions**.
- b.) View the status of their requisitions, along with where they are in the approval process.
- c.) Edit requisitions that are in draft status or not yet fully approved.
  - a. NOTE: Edits to requisitions before they are fully approved will restart the approval process from the beginning.
- d.) Connect to supplier websites to initiate punch-out requisitions.
- e.) Create a requisition for non-catalog items, this process is slightly different than Create Requisition.
  - a. **See instructions below.**
- f.) Edit default worktags for creating requisitions.
  - a. NOTE: there is a box titled *Requisition Details*. Clicking *Edit Details* in this box will allow you to change the default worktags that will auto-populate in your when creating a requisition from this worklet. Making changes to *Requisition Details* will change the default worktags on ALL future requisitions. Updating *Requisition Details* is **not recommended** for most users.

The screenshot displays the 'Requisitions' dashboard. At the top, there is a search bar labeled 'Search for Goods and Services' with the placeholder text 'Find equipment, supplies, and more'. Below the search bar is a table of requisitions. The table has columns for Requisition ID, Status, Total Amount, Created On, and Progress. The progress bar shows stages: Ordering, Receiving, and Invoicing. To the right of the table is an 'Edit Filters' button. On the far right, there are three sidebars: 'Requisition Details' showing the requesting user and company (Vassar College), 'External Suppliers' listing B&H Photo Punchout, Amazon Punchout, and Grainger Punchout, and 'Non-Catalog Request' with a link to 'Start a Non-Catalog Request'.

Requisition ID	Status	Total Amount	Created On	Progress
REQ-017314	Awaiting Action by [Redacted]	\$0.00	02/23/2022	Ordering   Receiving   Invoicing
REQ-016739	Approved	\$136,102.00	12/13/2021	Awaiting Order   Receiving   Invoicing
REQ-016493	Approved	\$40,000.00	11/15/2021	Awaiting Order   Receiving   Invoicing
REQ-016429	Approved	\$44,400.00	11/09/2021	Awaiting Order   Receiving   Invoicing
REQ-016179	Approved	\$0.00	10/19/2021	Awaiting Order   Receiving   Invoicing
REQ-015598	Approved	\$0.00	08/31/2021	Awaiting Order   Receiving   Invoicing
REQ-015501	Approved	\$0.00	08/23/2021	Awaiting Order   Receiving   Invoicing
REQ-015277	Approved	\$0.00	07/30/2021	Awaiting Order   Receiving   Invoicing

## Creating a Non-Catalog Request

Note: You can still create requisitions through the Create Requisition task. This is just another option.

- 1.) On the bottom right of the dashboard, click *Start a Non-Catalog Request*.
- 2.) Fill out the required fields on the next screen, and hit *Add to Cart*.
  - a. Note that towards the bottom there is a dropdown titled *Other details to add*. This is where you will provide the supplier and a memo describing the nature of the purchase.

### Non-Catalog Request

#### What do you need to order?

Description \*

#### What type of order is it?

Spend Category \*

Is this a goods item or a service?

Goods

Service

#### What is the quantity and cost?

Quantity \*

Unit of Measure \*

**Subtotal \$0.00 USD**

#### Requisition Details

Edit Requesting for, Ship-to Address, Worktags, and more.

 Requesting for  
[Redacted]

 Company  
Vassar College

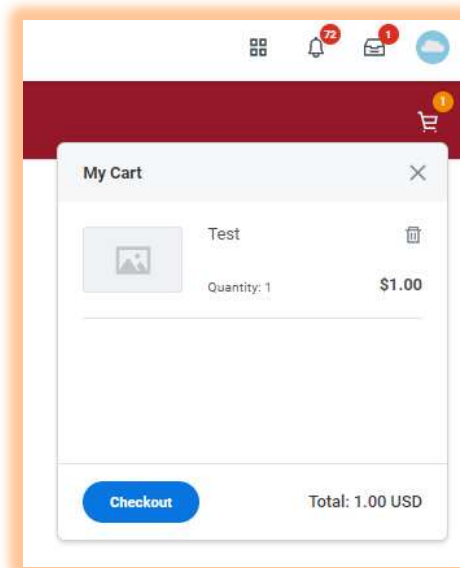
[Edit Details](#)

#### Other details to add

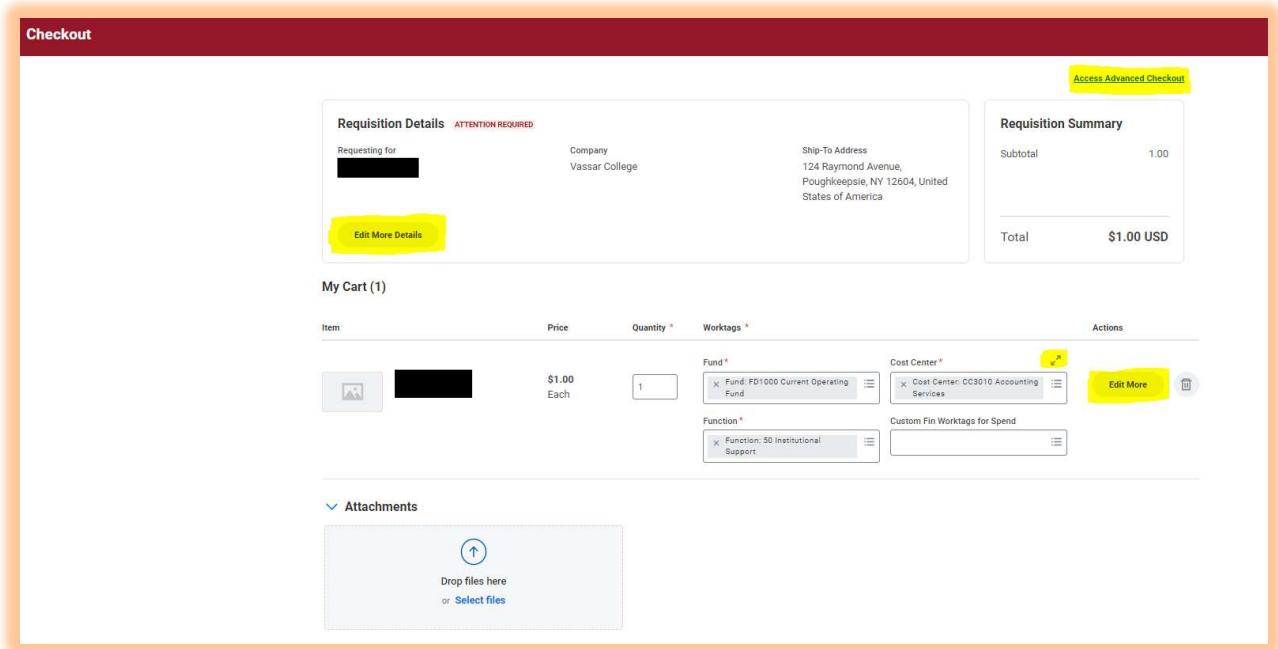
Supplier

Supplier Contract

- 3.) While you are adding items to your cart, you can view the cart by clicking the shopping cart on the top right of your screen. When you are done, click *Checkout*.



- 4.) On the checkout page, fill out all necessary information.
- Clicking *Access Advanced Checkout* at the top right of checkout will bring you to a screen that lays out the requisition in traditional format, as if the user was creating the requisition through the Create Requisition task.
  - The cart only shows only fields for Fund, Cost Center, Function and Custom Fin Worktags for Spend. To access the *Additional Worktags* field, either click "Edit More" or the Expand button right above the field for Cost Center.



- 5.) Under Requisition Details, click *Edit More Details*. Here you will find the field for Requisition Type, which is always required when submitting a requisition. There is also a field for external and internal memos. These are not required however the use of memo fields is encouraged when possible. When done updating these details, click *Save*.

**Edit Details** Edit Requisition
✕

! Attachment is missing.

Requesting for	Company	Currency	Request Date
Redmond, Joseph	Vassar College	USD	12/18/2020

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**Requisition Type**

✕ One Time Goods Purchase
⋮

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**Deliver-To Location**

! Changes will apply to all items

✕ Vassar Main Campus > Baldwin > Baldwin 229
⋮

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**Ship-To Address \***

! Changes will apply to all items

✕ 124 Raymond Avenue, Poughkeepsie, NY 12604, United States of America
⋮

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**External Memo**

**Internal Memo**

**Sourcing Buyer**

High Priority

Save

Cancel

- 6.) Add attachment(s) to the requisition that support the purchase. The attachment should be an order form that clearly identifies the items being requested, and the amount on the order should tie to the amount of the requisition.
- 7.) Click submit. You will now be brought back to the Requisitions worklet, and will see the requisition that was just submitted in your open requisitions.