FIN: Requisition Sourcing

Overview:

This document explains how Buyers can source requisitions.

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

Considerations by Institution

- None.

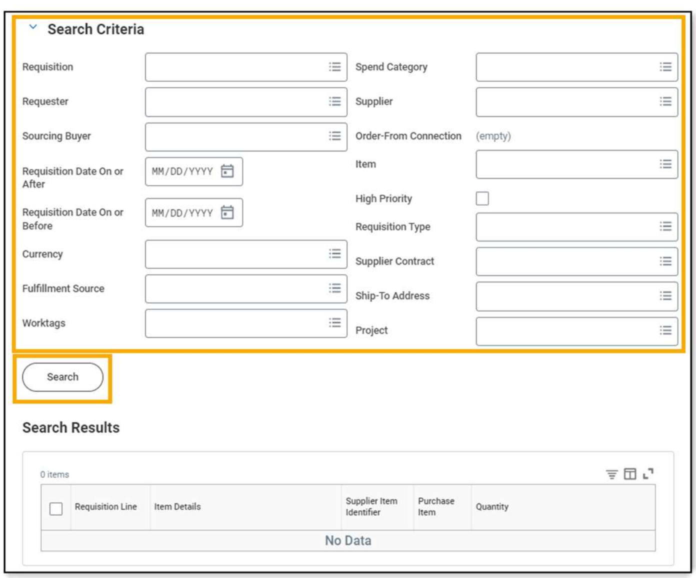
Icons referred to in This Document

Required Field Prompt Calendar Check Box

Requisition Sourcing Event

Note: Some fields may or may not be automatically populated. Any field that automatically populates should be left as is unless a change to the field is required. Fields that do not automatically populate should be entered in.

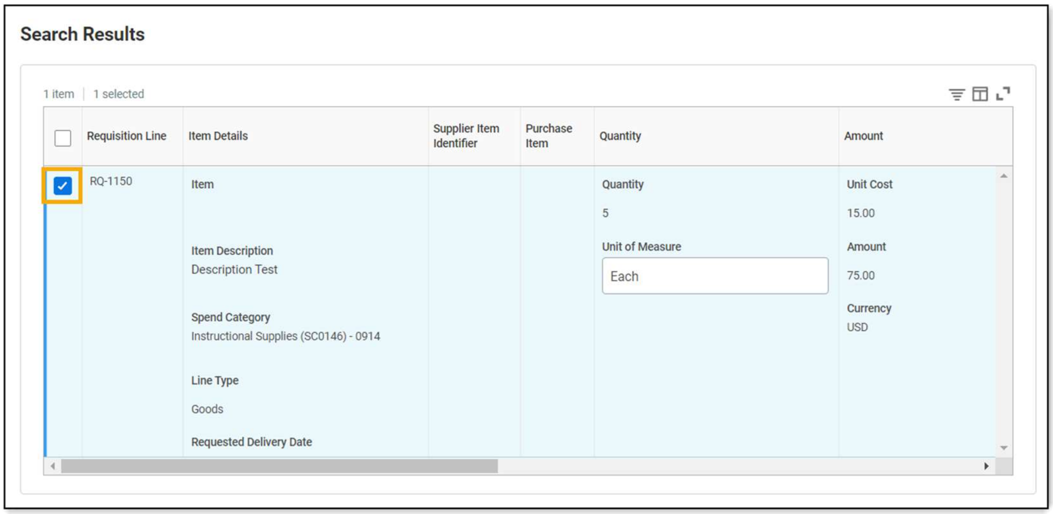
1. Enter ***Source Requisitions*** in the **Search** bar and select the task.
2. The Source Requisitions pop up displays.
3. **Company**: automatically populates.
4. Select **OK**.
5. The **Select Requisition Lines for Sourcing** page displays.
6. **Fulfillment Source**: automatically populates; use the **Prompt** to change **Fulfillment Source** if applicable.
7. (Optional) Fill in the fields under the **Search Criteria** section to narrow down Search Results.
8. Select **Search**.



9. The table refreshes with applicable results.
10. Select the **checkbox(es)** to choose the lines for the requisition.

    Note: Some requisitions have multiple lines associated with them. <u>**All lines** associated with the</u>

requisition must be selected.



11. Select **OK**.
12. The Create Requisition Sourcing Request page displays.
13. Fill in the following fields:
    a. (Optional) **Name**: enter a ***Name***.
    b. **Fulfillment Source**: automatically populates.
    c. **Add to Existing Purchase Order**: use the **Prompt** to select **Existing Purchase Order** if applicable.
14. Fill in the following fields under the **Document Defaults** section:
    a. **Supplier**: automatically populates.
    b. **Purchase Order Type**: use the **Prompt** to select the **Purchase Order Type**.
    Note: This field may automatically populate.
    c. **Supplier Contract**: use the **Prompt** to select the **Supplier Contract** to apply the purchase order to an existing contract
    d. **Order-From Connection**: Not applicable.
    e. **Currency**: use the **Prompt** to select the **Currency.**
    f. **Consolidate**: select the **checkbox** if applicable.
    g. **Exclude Ship-To Address when Consolidating Requisition Lines**: select the **checkbox** if applicable.
15. Fill in the following fields under the **Contact Information** section:
    a. **Issue Option:** Not applicable; set through Supplier Accounts.
    Note: XML should be selected for all punch-out purchase orders.
    b. **Bill-To Contact:** automatically populates.
    c. **Bill-To Contact Detail:** automatically populates.
    d. **Bill-To Address:** automatically populates.
    e. **Ship-To Contact:** automatically populates.
    f. **Ship-To Contact Details:** automatically populates.
16. Review and validate the following fields in the **Goods Lines** section:
    a. **Spend Category**
    b. **Memo line**

c. **USource**
d. **Unit Cost**
e. **Item**
f. **Description**
g. **Due Date**

Note: The Due Date field should be blank.

17. Select **Submit**.

Notes:

- Once submitted, the PO is automatically routed to the correct PO approver for approval.
- The initiator will receive a notification if the PO sourcing is denied.
- Once approved, the PO will need to be Issued to finalize the PO.
- For information on Issuing a PO, please review the Purchase Orders and Change Orders job aid.