Requisition Worklet Job Aid

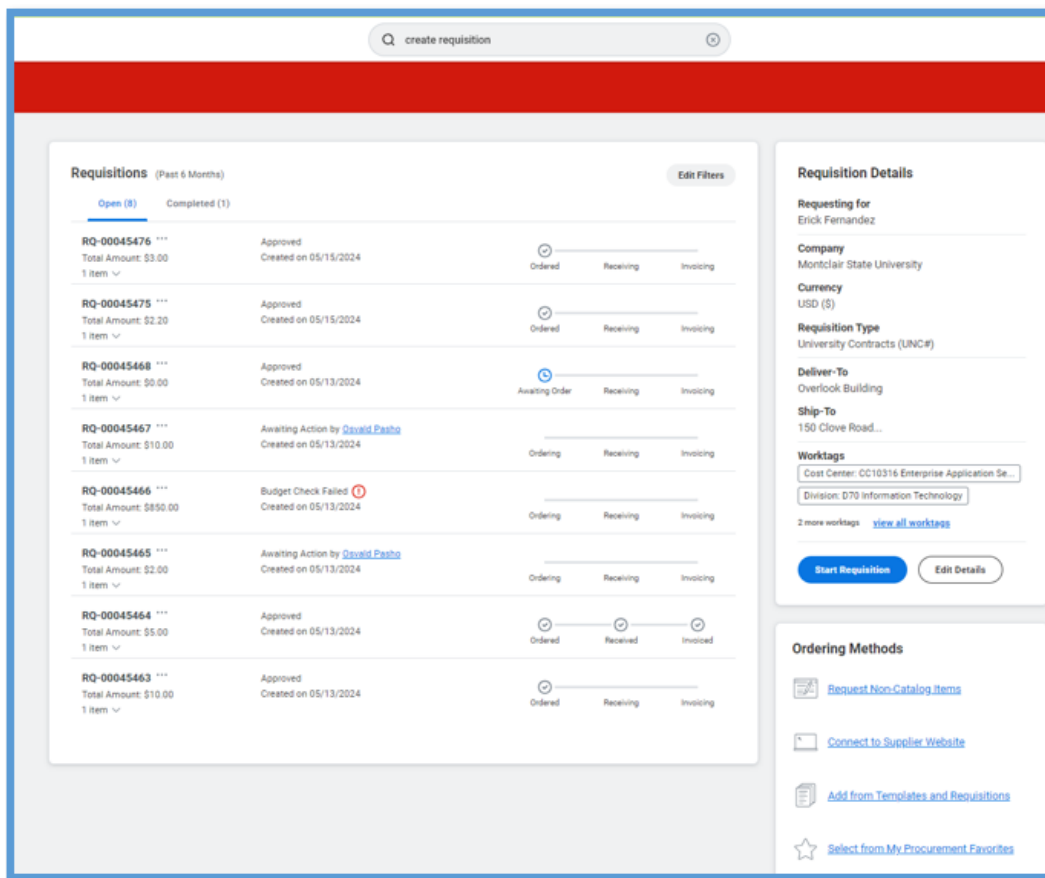## Table of Contents

Requisition Worklet Job Aid

Getting to the Requisition Worklet Page

1. On the Search Bar, type either: "Create Requisition" or "My Requisitions"
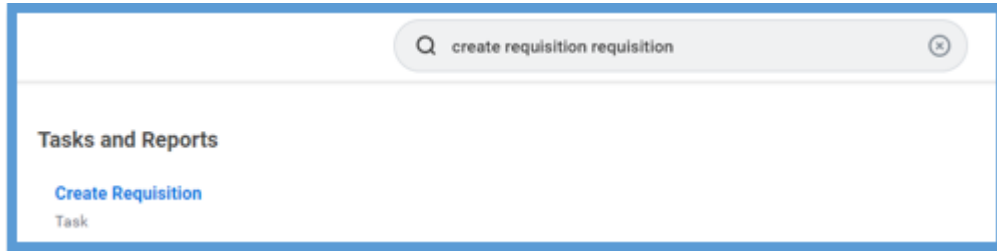
2. The Requisition Worklet Screen will display after clicking "Create Requisition"

This screen displays a list of all requisitions created within the past 6 months, including the "Completed" requisitions*. The new screen will display all the requisitions and the status of each of the processes associated with them.

*Please note that the system will display only the last 50 requisitions. If information on 50+ requisitions is needed, please run the "Requisition Life Cycle" Report.

3. **The "Requisition Details"** displays the fields populated by default by Workday.
   Please note that the system will always choose the "Requisition Type" used in the previous requisition. Make sure to change it accordingly.

Requisition Details

Requesting for
Erick Fernandez

Company
Montclair State University

Currency
USD ($)

Requisition Type
1 Quote

Deliver-To
Overlook Building

Ship-To
150 Clove Road...

Worktags
Cost Center: CC10294 Purchasing

Division: D53 Finance and Treasury

2 more worktags   view all worktags

Start Requisition   Edit Details

4. Click "Edit Details" if you would like to modify any of the fields displayed on the current screen (you can do this on the main page of the requisition later on too).

Worktags
Cost Center: CC10316 Enterprise Application Se...

Division: D70 Information Technology

2 more worktags   view all worktags

Start Requisition   Edit Details

5. In the "Edit Requisition Details" screen, modify accordingly and click "Save Changes"

6. In the "Ordering Methods" section, choose whether your requisition is a "Non-Catalog" or a "Punch-Out." This section also allows you to select templates (copy from previous requisitions).
    Please note that if you choose "Connect to Supplier Website," the system will immediately connect you to the Punch-Out screen with which you are familiar.

7. Click "Start Requisition," and the system will display the new screen.

8. Enter at least the mandatory information with the red asterisk. Click "Add to Cart."

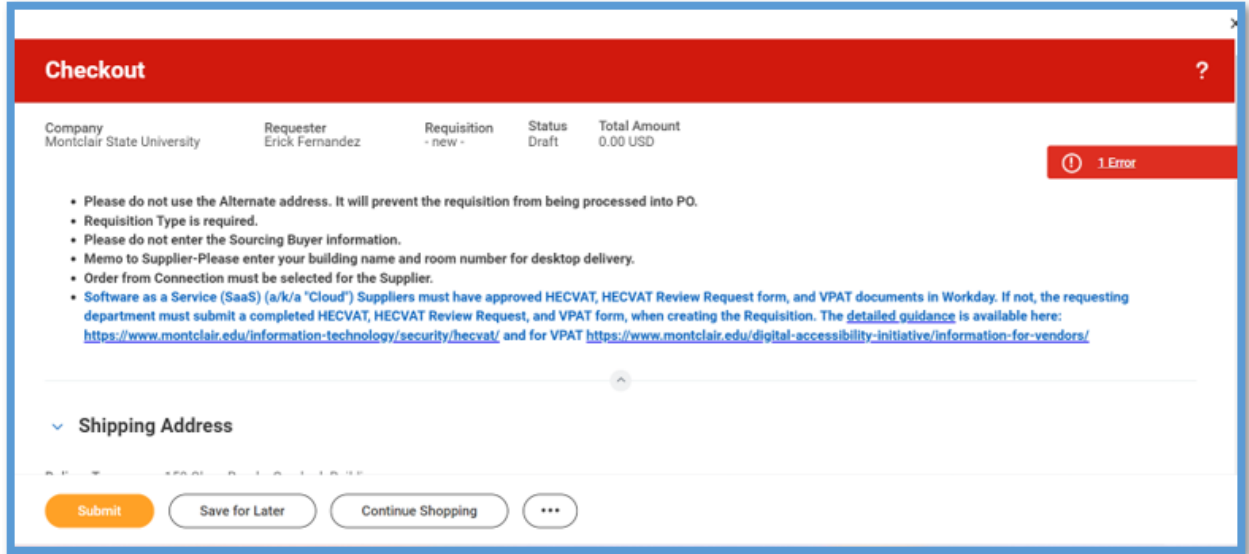9. Please note that after clicking "Add to Cart," the system stays on the same screen, and all the fields become blank. This is normal; click on the "Shopping Cart" or "Add Another Item"
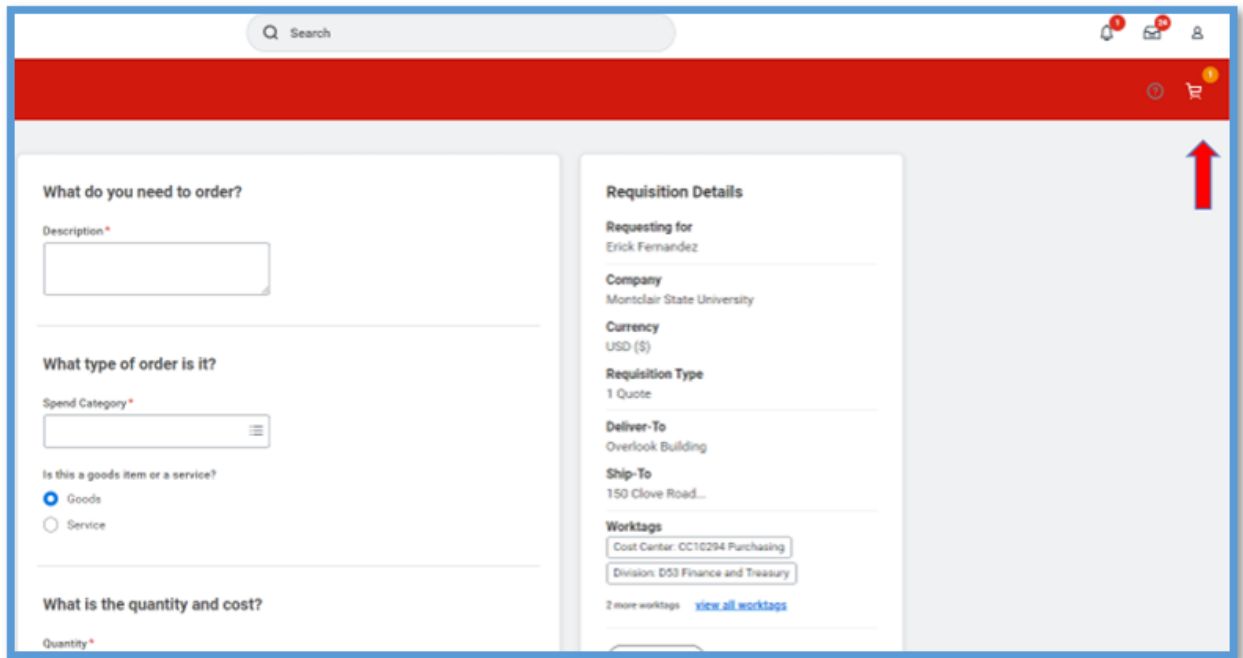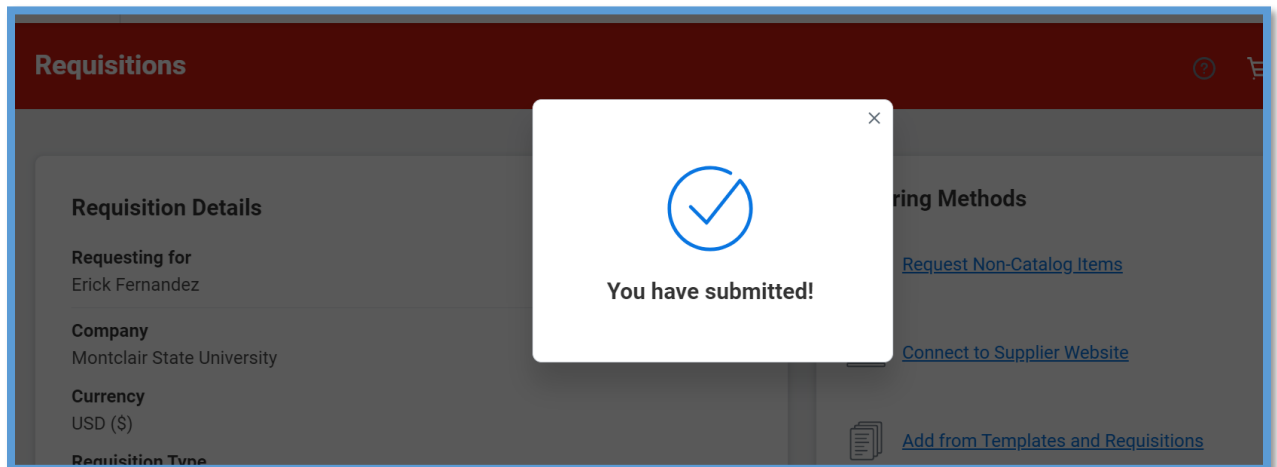

10. Once you click on the "Shopping Cart," the system displays "My Cart – View Cart," click "Checkout"
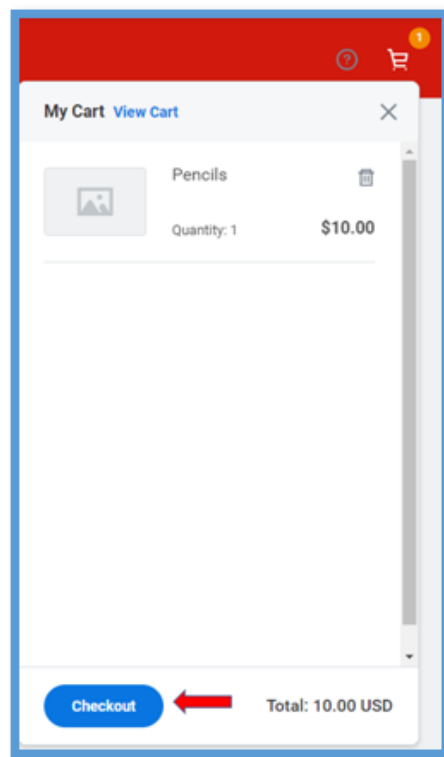
11. After clicking "Checkout," the system takes you to the screen you are familiar with. Please make sure all the necessary information that was **<u>not</u>** entered in the beginning is entered here in order to prevent any errors when submitting the requisition for approval.


12. Please note that after submitting a requisition using any type of Cooperative Contract (State, Local, National, GSA), University Contract, BOT Waiver, Sole Source, or Emergency Procurement as the Requisition Methodology, the system will display the legend "You have submitted." However, you will need to go into your Inbox to complete the questionnaire and submit it in order to trigger the approval process.

13. Go to your Inbox and complete the Contract Info questionnaire and click "Submit"
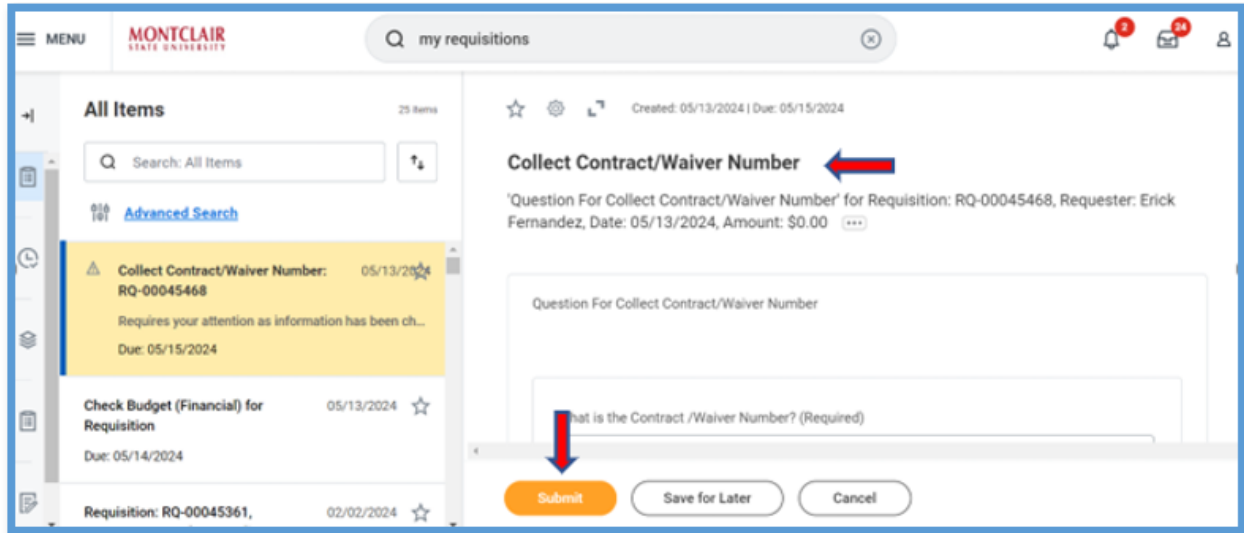
14. Once you submit the questionnaire, you will be able to see the status of the requisition on the Worklet page, as well as the receiving and invoicing status.
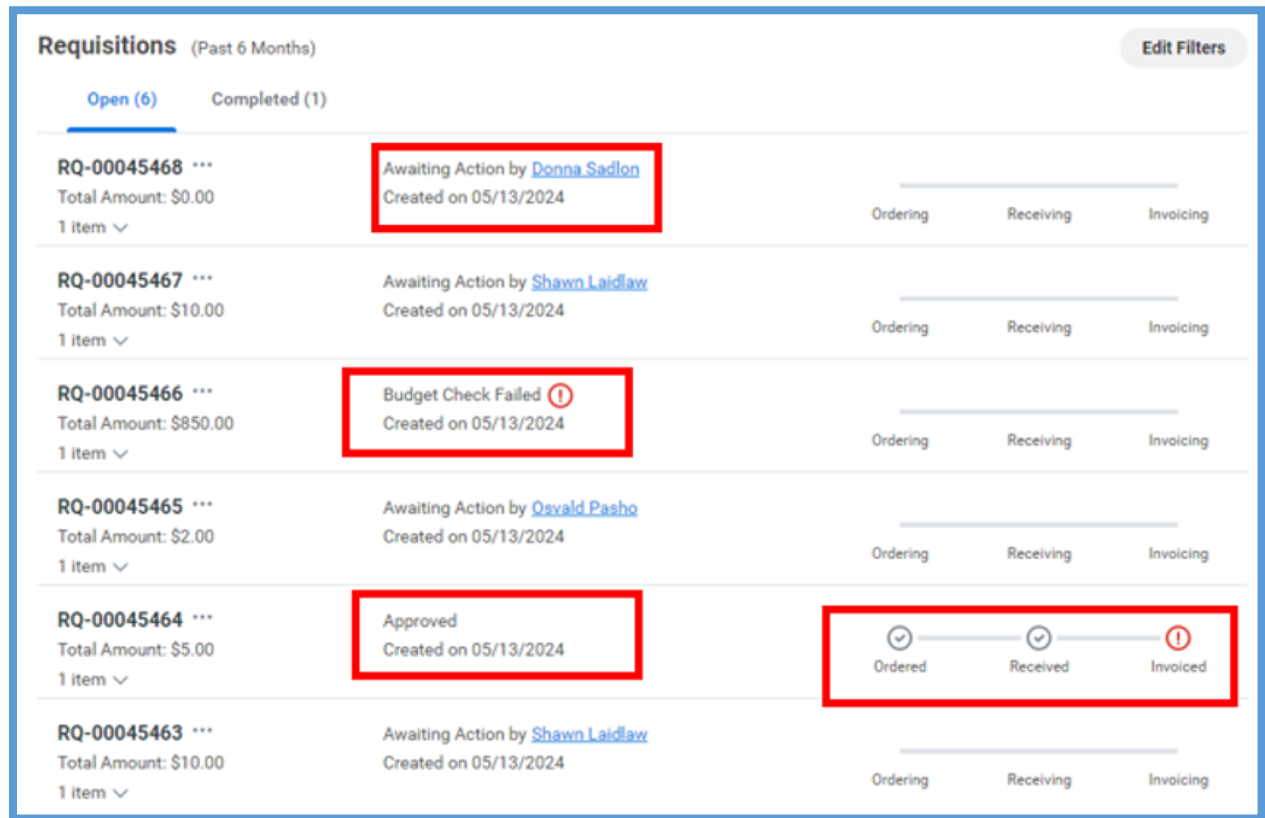
15. The Requisition Worklet page will display important information such as Budget Errors, Awaiting Action, and requisition Approval status. You can also find important information such as Purchase Order number, Receipts, and Invoices, along with payment status, by simply clicking the fields **Ordered, Received,** and **Invoiced**.
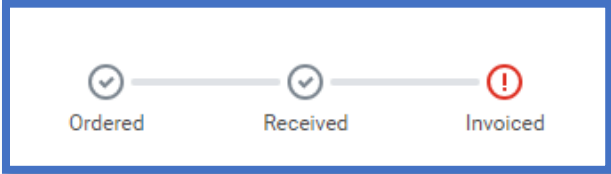
   a- Click on any "Red Warning" in order to see the error Workday has encountered
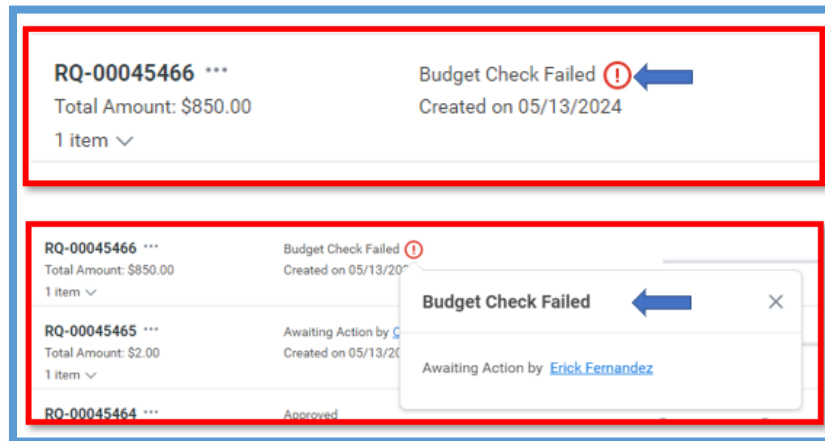
   b- Click on the three dots next to the requisition number so that you can edit the requisition accordingly
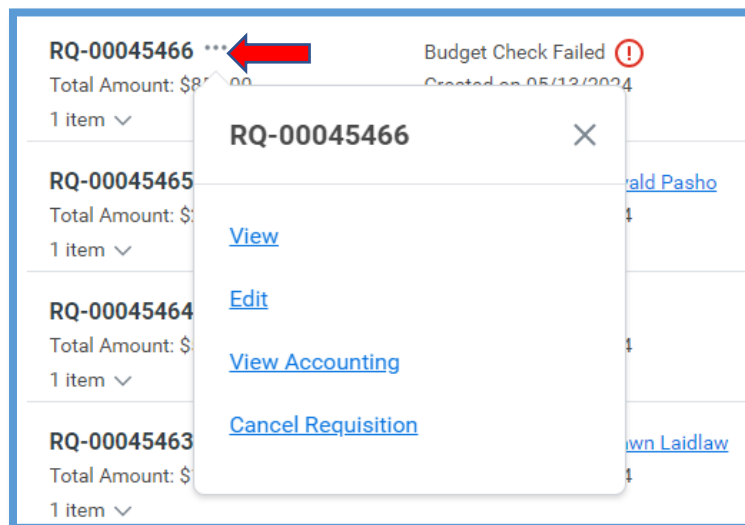
c- Click on the "Ordered," "Received," and or "Invoiced" fields to see the information associated with it.


d- **Awaiting Order – Ordering – Ordered Field**
- Awaiting Order: the requisition has been approved but has not yet been sourced.
- Ordering: the requisition has been approved and partially sourced.
- Ordered: the requisition has been approved and fully sourced.
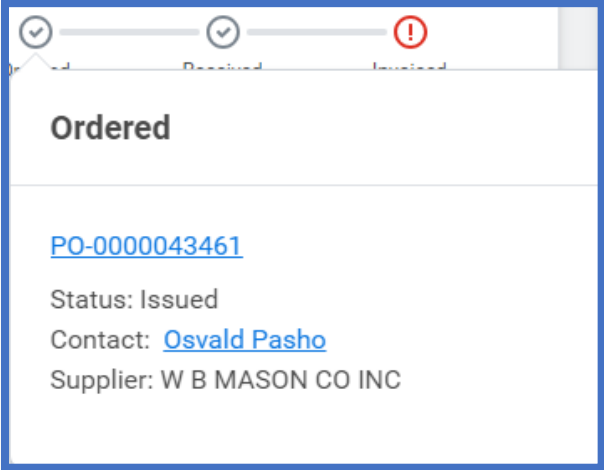
e- **Receiving – Received Field**
- Receiving: the PO has been issued but has not been fully received
- Received: the PO has been issued and has also been fully received
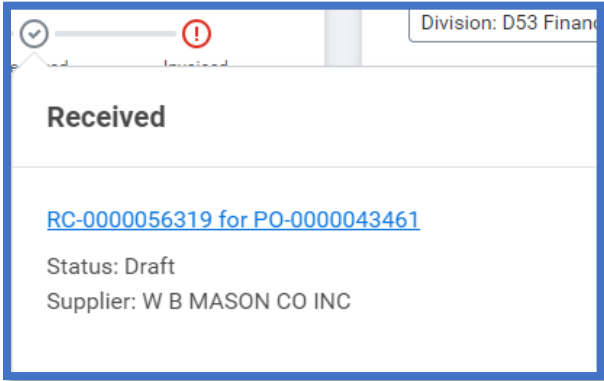
f- **Invoicing – Invoiced – Match Exception**
  - Invoicing: the purchase order has been issued but has not been fully invoiced
  - Invoiced: the purchase order has been issued and has also been fully invoiced
  - Match Exception: the purchase has been invoiced, but there is an invoice in match exception (most likely due to a missing receipt).
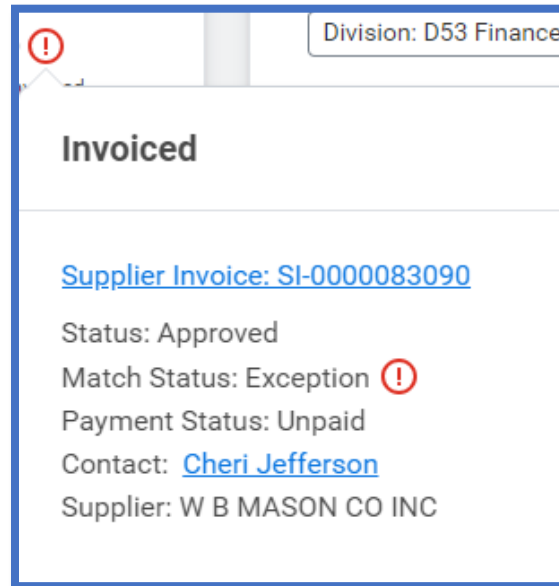
g- Finally, when the requisition cycle is done, the system switches the requisition from the "Open" to the "Completed" tab