

## CREATE REQUISITION

**Purpose:** To initiate a purchase requisition for approval to the Purchasing Department and subsequent creation of a Purchase Order for transmission to a desired Supplier.

**How to Access:** Open the **Purchases** worklet, then select **Create Requisition**.

**Helpful hints:**

- Refer to Bentley's Purchasing Policy (<http://www.bentley.edu/offices/purchasing/purchasing-policy>)
- You must provide sufficient information to allow both Purchasing and the Supplier to fulfill the requisition.
- If you wish to purchase items from W.B. Mason please refer to the *Requisition from Supplier Website* section on page 7-8.

1. Click the **Purchases** worklet, then select **Create Requisition**.

**1A.** Requisition Type = **One Time Goods/Service Purchase** or **Open Purchase Order**.  
Click **OK**.

**1B.** Click the hyperlink for **Request Non-Catalog Items**

The screenshot shows a form with the following fields:

- Company:** Bentley University
- Requester:** Lynn Roycroft
- Currency:** USD
- Requisition Type:** A dropdown menu with a search bar and the following options:
  - Inventory Replenishment
  - One Time Goods/Service Purchase (highlighted with a red circle)
  - Open Purchase Order (highlighted with a red circle)
  - Punchout
  - Service Contracts

Two blue arrows point from the highlighted options to the text:

- From "One Time Goods/Service Purchase" to "One Time Purchase"
- From "Open Purchase Order" to "Spend Over Fiscal Year"

2. Requisitions can have multiple lines. For your first line, select one of the following:

**2A.** **Request Goods** for items to be ordered.

**2B.** **Request Services** for batched services entered in one lot or Open Purchase Order.

**Note: If you have a quote/acknowledgement/order document from the Supplier, then you do not need to enter every line item on that quote.**

**Enter the entire quote as one Lot and Amount.**

Non-Catalog Request Type

Request Goods  
 Request Service

Goods Request Details

Item Description \*

Spend Category \* ⋮

Supplier ⋮

Supplier Contract (empty)

Quantity \* 0

Unit Cost 0.00

Unit of Measure \* select one

Extended Amount 0.00

Non-Catalog Request Type

Request Goods  
 Request Service

Service Request Details

Description \*

Spend Category \* ⋮

Supplier ⋮

Supplier Contract (empty)



Start Date MM / DD / YYYY

End Date MM / DD / YYYY

Extended Amount 0.00

Fiscal Year  
for Open PO

3. Enter the line item details in the **Item Description** box.  
Recommended text when referencing a quote/acknowledgement/order:  
*“To cover the cost of (order details) per quote #      dated      including (eg: freight/installation/etc.)”*
4. In **Spend Category** field, type part of the category name and hit **Enter** to start search OR use the drop-down list to locate the desired Spend Category.  
**See Commonly Used Spend Categories list for guidance.**
5. In the **Supplier** field, type part of the supplier name and hit **Enter** to start the search OR use the drop-down list to locate the desired Supplier.  
To search an alphabetical vendor list, select **Suppliers by Supplier Group** and scroll to **Suppliers A-L** or **Suppliers M-Z**.
  - 5A. If you do not have a specific Supplier, leave this option blank and Purchasing will assist in Supplier selection.
  - 5B. If the desired Supplier is not listed, a **Create Supplier Request** form must be submitted. (See Supplier Request instructions on pages 9-10)
6. Enter value fields for the Good or Service line item.
  - 6A. For **Goods**, enter the **Quantity** as “Each” or “Lot”, **Unit Cost** and **Unit of Measure**.
  - 6B. For **Services**, enter the **Extended Amount** field as the total amount of the service provided. Plus fiscal year **Start / End Dates** for Open Purchase Orders.

7. Click **Add to Cart** and **OK**.
8. If the requisition has more than one line item, repeat steps 2 – 7 for each additional line.
9. To continue, click the **Shopping Cart** icon at the top right corner of the screen. 
10. Review and edit the **Description**, **Quantity**, and **Memo** fields, if desired.
  - 10A. To remove items from the order, click the **Trash Can** icon on the right. 

**Note: You will be able to fully edit, add and remove items later in the Review tab.**

**If you exit from the requisition at this point, your changes will not be saved, but items may remain in your Cart.**

11. Click **Checkout** in the lower left corner when edits are complete.
12. On the **Shipping Address** tab, there can only be one address per requisition. Choose one of the following:
  - 12A. Retain the **Default Ship-to Address** of Receiving at 450 Beaver St.
  - 12B. Use the drop-down list next to the Default Ship-to Address. Select **Addresses by Location** and choose another approved delivery location.

Note: Do not manually enter an Alternate Address. If the desired location is not listed, please contact the Purchasing Department.
13. On the **Information** tab, **One Time Goods/Service Purchase** is the **Requisition Type**.  
Note: Special instructions for the Supplier can be entered in the **Memo to Suppliers** field.
14. On the **Attachments** tab, upload any quotes, contracts, or agreements and any written justification related to this purchase.
15. On the **Review and Submit** tab, edit any line item fields at this point.
  - 15A. Update Request Date for correct Fiscal Year if needed.
  - 15B. Edit, Add or Remove any Goods or Services line items and Spend Categories.
  - 15C. Edit Cost Center and Worktags for Division, Fund and Program.
  - 15D. Use drop down menus to select appropriate overriding Grant, Gift or Project

15E. Split line items to share costs

Currency \*  
X USD ...

Request Date \*  
10 / 10 / 2017

	Description	*Spend Category	Supplier	Extended Amount
<div style="border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; margin: 5px auto; display: flex; flex-direction: column; align-items: center; justify-content: center;"> <span style="margin-bottom: 5px;">+</span> <span style="margin-bottom: 5px;">-</span> </div>	To cover the cost of moving residence life furniture from storage and installation into 10 dorm rooms per quote #7645 dated 10/1/2017.	<span style="border: 1px solid #ccc; padding: 2px;">Moving &amp; Storage</span>	Supplier <span style="border: 1px solid #ccc; padding: 2px;">Olympia Moving &amp; Storage</span>  Supplier Contract <span style="border: 1px solid #ccc; padding: 2px; display: block; height: 15px;"></span>	<span style="border: 1px solid #ccc; padding: 2px; display: inline-block; width: 60px;">5,000.00</span>

1 item

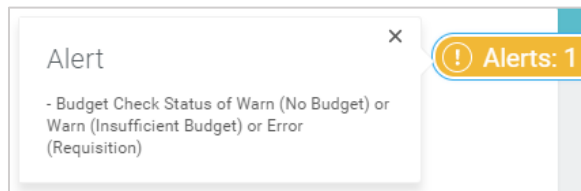
*Cost Center	Gift	Grant	Project	*Additional Worktags	
<span style="border: 1px solid #ccc; padding: 2px;">X 6500 Office of Dean for Student Affairs</span>	<span style="border: 1px solid #ccc; padding: 2px;"> search</span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;"> </span>	<span style="border: 1px solid #ccc; padding: 2px;">X Division: Division of Student Affairs</span> <span style="border: 1px solid #ccc; padding: 2px;">X Fund: 1100 Operating Fund - E&amp;G</span> <span style="border: 1px solid #ccc; padding: 2px;">X Program: 400 Student Services</span>	Splits <span style="border: 1px solid #ccc; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">0</span>

Submit
Save for Later
Cancel

17. After reviewing all the information, click **Submit** and **Done**.

- Workday will check for a sufficient budget to complete the purchase. If the budget check fails, an Alert will pop up. Click on Review and Submit if you would like to continue the request without sufficient budget and click **Done**. Bypassing this step will place a request in your Inbox waiting for you to override the alert.
  - For Capital Projects, a budget check failure will be a **“hard stop”**. You will need to work with the Budget Office to increase this budget before continuing.
- Workday will also alert you of entry errors. Click on the Error message to reveal necessary field entry adjustments before submission will complete.





- Upon submission, the request will be sent to the appropriate Cost Center Manager for approval. Once approved, the Requisition will be forwarded to the Purchasing Department for processing.

