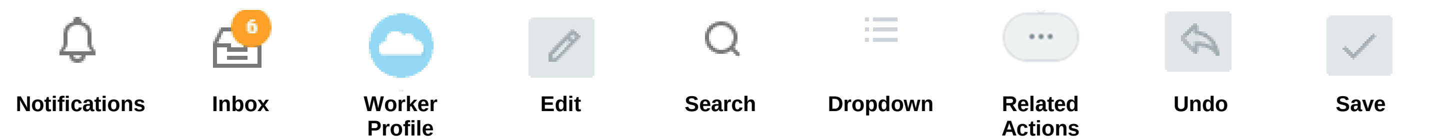
Requisitioning

Common Workday Icons



Intended Audience:

- Requesters
- Requisition Approvers

Background:

- Requisitions are leveraged to ensure spend approval prior to committing the organization to that spend.
- They help to ensure budget availability as well as ensuring the need for the business.

Requisition Types	
Goods and Service	For general products and services regularly used within the organization. (special ordering, catalog goods, punch-out suppliers, and templates.)
Bill with procedure	Used primarily by the operating room buyer team (consigned products and goods related to procedures.) Does not require a receipt.
Capital	Used for all capital goods purchases. Requires prior approval through the finance department. This is restricted to a small list of users.
Credit Card	This is restricted to MGH credit card holders
Emergency Storeroom Stock	For supplies that are needed immediately from the ACH Storeroom. Note: Not to be used for by MGH company.
Inventory Replenishment JIT Par Replenishment Par Ex Replenishment Par Replenishment	For use by storeroom staff only
Repair/Exchange	OR/Clinical Engineering, example repair of a scope
Service Contracts	Used by service directors, IT , clinical engineering , lab, plant ops, OR for service contracts

Requisitioning

Instructions - Set default Deliver-To address:

(Note: Complete this step prior to creating your first requisition. The deliver-to address will then default, but can also be changed in the requisition process)

1. Search for **Change my Work Space** in the search bar and select
2. Select the appropriate Work Space from the drop down menu for delivery
3. Click **Submit**

Instructions - Create Requisition:

1. Click on the **Purchases** application from the Workday dashboard.
2. Under Actions choose from:

Search Catalog	Used for products within the MaineGeneral item master
Request Non-Catalog Items	Used for products or services not within the MaineGeneral master. Note(s): Items purchased more than once per year should be added to the item master. All special orders are reviewed by a procurement department buyer.
Connect to Supplier Website	Used for punchout suppliers such as WB Mason, Grainger, CDW, and Insight.)
Add from Templates/Requisitions	Templates are created and maintained by the end user. Templates are an excellent resource for products ordered together on a regular basis. This requisitioning option also allows for previously processed requisitions to be copied and resubmitted.)
Select from my Procurement Favorites	Select from my Favorite items

3. Complete Header Detail
    a. **Company**: Select Company Purchasing for
    *Note**:** Company will auto-populate with the last value used*
    b. **Requester**: Purchasers Name
    *Note**:** If purchasing on behalf of someone, please indicate their name*
    c. **Currency**: Auto-populates
    d. **Requisition Type**: Select appropriate requisition type- refer to the chart above
    e. **Deliver-To**: Auto-populates if Work Space has been defined. Select the space you would like product delivered to within the facility.

   f. **Ship-To**: Auto-populates based on Deliver-To
   g. **Cost Center**: Defaults to home department. (Can change the cost center as appropriate.)
   h. **Project Task**: Used only for Capital Requisitioning
   i. **Additional Worktags**: Auto-populates
4. Click **Search**

For Search Catalog:

   a. Placing a checkmark in the box to the left of the item name to select it
      Note: *Order quantities are entered at the next step of the process. Clicking on an item name will bring you to the item details*
   b. Click **Add to Cart** after all items to be ordered have been selected
   c. Click on **the shopping cart** to complete your checkout
   d. Click **View my Cart** to review the items to be purchased
   e. Click **Checkout** to finalize the checkout process
      Note: *Order quantities can be adjusted within either option*
   f. In View my Cart
      i. Change item quantities by selecting the item in the list to the left and adjusting the quantity in the window on the right
      ii. Remove items by selecting the item on the left and clicking the trash can icon in the upper right
      iii. Click **Checkout** when order is complete and ready to finalize
   g. At Checkout
      i. Confirm header details transferred to order such as deliver-to details
      ii. Note the total value of the purchases
      iii. Review goods within cart and make adjustments as needed
   h. Click **Submit**

For Request Non-catalog Items

   a. Use the radio buttons to indicate whether the request is for goods or service
   b. **Item Description:** Please be as detailed as possible
   c. **Supplier Item Identifier:** If the supplier shows one of their ordering platform
   d. **Spend Category:** Select appropriate spend category to support your request
   e. **Supplier:** If you do not select a supplier, one will be chosen for you.
   f. **Quantity**
   g. **Unit Cost**
   h. **Memo**
   i. Click **Add to Cart**
   j. In View my Cart

i. Change item quantities by selecting the item in the list to the left and adjusting the quantity in the window on the right
ii. Remove items by selecting the item on the left and clicking the trash can icon in the upper right
iii. Click **Checkout** when order is complete and ready to finalize

k. At Checkout
   i. Confirm header details transferred to order such as deliver-to details
   ii. Note the total value of the purchases
   iii. Review goods within cart and make adjustments as needed
   iv. Click **Submit**

For Connect To Supplier Website

a. Click the **Connect** button for the supplier connecting to
b. Use the supplier website to select products to order
c. Click **Checkout** when order is complete
d. The order will transfer back into Workday
   Note: *Order quantities cannot be adjusted once the order has transferred back to Workday*
e. Click **Submit**

For Add from Templates and Requisitions

a. In Templates
   i. Place a checkmark in the box to the left of the template you want to order from
   ii. There are two options for adding items to your cart
   iii. Click **Add to Cart** to add the full template items list to your cart
      a. From here proceed to View my Cart or Checkout
   iv. Click **View Items** to select only a few items from the template to be ordered
      a. Place a checkmark next to the items you want to order and indicate the quantity to order in the box to the right
      b. Click **Add to Cart**
b. In View my Cart
   i. Change item quantities by selecting the item in the list to the left and adjusting the quantity in the window on the right
   ii. Remove items by selecting the item on the left and clicking the trash can icon in the upper right
   iii. Click **Checkout** when order is complete and ready to finalize
c. At Checkout
   i. Confirm header details transferred to order such as deliver-to details
   ii. Note the total value of the purchases

iii. Review goods within cart and make adjustments as needed
iv. Click **Submit**

For My Procurement Favorites

a. In order to order from procurement favorites, items would first have to be added to the favorites list. Search *Manage My Procurement Favorites* in the search field and add your frequently purchased items here.

Important to Note:

- Non Inventory Orders greater than $300 and under $5,000 route to Cost Center Manager for final approval
- Non Inventory Orders greater than $5,000 route to Cost Center Director for final approval
- Non Inventory Orders greater than $50,000 route to Cost Center VP for final approval
- Non Inventory Orders greater than $100,000 route to CFO for final approval

Other Resources:

- Include links to Video Learning (if applicable, i.e., SCM)