Creating Purchase Requisition

FOR CATALOG GOODS

BEFORE YOU BEGIN

- Ensure that you have appropriate cost information for requisition.
- Program Number: Spend Category (formerly Sub-Object Code) and Company - always 200.
- Ensure that you have all documents (e.g., requests from end users, quotes, etc.) available in single electronic PDF format.
- Supplier: If you know the Supplier, type Supplier: [suppliers name] in the Workday search box to verify it exists.
- To request a supplier be added in Workday, use the New Supplier Request form under Quicklinks.
- Disable pop-up blockers on your internet browser before connecting to UMarketplace.

START PROCESS

- Click the Purchases Worklet then click Connect to Supplier Website.
- On Initiation Screen - select Company: 200.
- Requester: Enter your name or name of the person you are purchasing for.
- Currency: Do Not Change.
- Click OK and then click Connect to go to the UMarketplace.
- You are now in UMarketplace. You may now shop for items.
- To shop by supplier, click Showcases Section.
- To conduct a high-level search, search and compare items.
- Click on the supplier in the Showcases section and follow prompts to add items to cart and check out.
- When you check out from the supplier website, those items will be added to your UMarketplace cart.
- Review your cart for accuracy.
- Click on the Name This Cart field and provide name for Purchase Requisition.
- If applicable, provide external instructions to supplier (e.g., Delivery tents on Saturday).
- Click View Cart Details.

CHECKOUT PROCESS

- Verify information for each item.
- To remove items from your cart, choose items on the left-hand side of the screen and then click on Delete.
- Click Check Out then click “x” to clear Default Ship-To address.
- Default Ship-To Address: click and type your suite number to narrow down the available options.
- Apply Ship-To Address Changes to All Lines: check box.
- Use Alternate Address: leave unchecked.
- Click Next Requisition Type: click and choose goods.
- Sourcing Buyer: leave blank.
- Internal Memo to Supplier: enter additional information as needed internally to UM.
- Click Next. Select Files and choose attachments as applicable (e.g., quotes, etc.).
- External: leave unchecked.
- Enter Comments to describe attachment for approvers.
- Click Next Currency: do not change.
- Request Date: do not change.
- Click to select Program Number or Program Name. Once you make a selection, relevant fields will prepopulate.
- Click Submit.

SPLIT PROCESS

- To split costing of this Purchase Requisition between multiple Worktags: from the Review and Submit screen, scroll down to the line item. Scroll right to see the splits column. Click OK.
- Next, click and choose from: Amount or Quantity, Enter percent Amount or Quantity.
- Select one of the following Programs as appropriate. Click + to add additional rows and repeat steps. Click Done.

PROCESS STATUS

After submitting a Purchase Requisition, follow these instructions to check the status.

- Click on your name at the top right-hand corner, click Inbox, click Archive tab.
- Click on item you want to review. The overall status is noted in small gray text under the inbox item.
- Click Process tab. The Process History will display, then click Remaining Processes to review remaining processes detail.