

Create Catalog Purchase Requisition Overview

This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper** through creating a requisition from catalogs found on the UVA Marketplace. By the end of this QRG, you will be able to successfully create a catalog purchase requisition in Workday to procure goods and supplies as per UVA's need. You will be able to place orders for these goods on the UVA Marketplace integrated in Workday. You will also be able to successfully create an intercompany catalog purchase requisition, which is a requisition for a UVA company other than your own home company.

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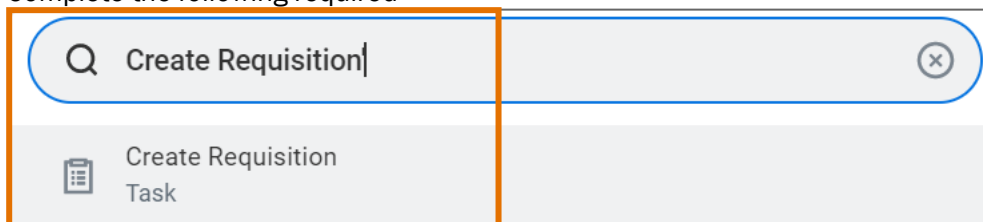
Procedure: Create Purchase Requisition

On the Workday **Home** screen:

1. Type Create Requisition in the search field.
2. Select Create Requisition from the Search Results.

On the **Create Requisition** screen:

3. Complete the following required



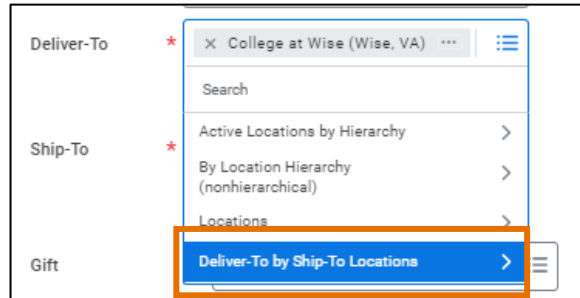
The screenshot shows a search bar with the text 'Create Requisition' entered. Below the search bar, a search result is displayed with a document icon and the text 'Create Requisition Task'. This result is highlighted with an orange rectangular box.

fields:

- **Requester** – auto-populates based on user. If the requisition is being created for someone else, change the Requester to the appropriate individual. NOTE: This is the only place to change the Requisitioner. If a change from the default is needed it **MUST** be done here.

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- **Company** – auto-populates based on user.
- **Currency** – auto-populates to USD.
- **Requisition Type** – select **Contract Request** when Spend Category Buyer review is needed, otherwise select **Standard**.
- **Deliver-To** – auto-populates based on the employee. If you want to keep the auto-populated suggestion, this will need to be updated to include the specific building details (e.g., name and room number). To select your accurate floor and/or room level Deliver to To Address:
 1. In the Deliver-To field, select the **Deliver-To Ship-To Location** category.



2. In the Deliver-To Ship-To Location dropdown, select the **building** or **building address** from the list and then select either a **floor level** or a **specific room** within the floor.



To avoid manually updating the Deliver-To field in the future, refer to the [Change My Workspace and “Deliver-To” Location ORG](#).

- **Ship To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Ship To location as needed.



- The Deliver To field auto-populates but does NOT include the building names and room numbers. This means some shipments will arrive with only basic delivery information such as street address and the name of the requester.
- Worktag information may be added at this time, or once the requisition has been sent back to Workday from the UVA Marketplace. However, if you would like the Worktag information to apply to ALL lines, it will save time to enter this information on this Header level.

4. Select **OK** to proceed.

On the second **Create Requisition** screen:

5. Review the Requisition Instructions by selecting the **Purchasing Basics** link, if needed.

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6. Select **Connect to Supplier Website** to proceed.
On the **Connect to Supplier Website** screen:

Create Requisition

Company
The University of Virginia's College at Wise

Requester
Amanda Grace Hughes

Currency
USD

Requisition Type
1. Standard

Instructions

Requisition Instructions

Before you process your requisition, please refer to the Purchasing Basics here. If you have questions or need additional assistance, please call 434-924-4212.

<https://procurement.virginia.edu/purchasing/purchasing-basics>

Select an Option

Connect to Supplier Website

Use this link to connect to the Jaggaer Marketplace to view the available catalog and non-catalog items.

7. Select **Connect** to navigate to the UVA Marketplace.

Connect to Supplier Website

Company
The University of Virginia's College at Wise

Requester
Amanda Grace Hughes


Currency
USD

Requisition Type
1. Standard

Supplier Websites 1 item

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
	UVA Marketplace	Yes		UVA Marketplace	Connect

Continue Shopping

**NOTE**

QRG links to help you navigate and shop in the UVA Marketplace can be found at the end of this QRG


After Returning Cart to Workday, on the Workday **View Cart** screen:

8. Review the item details on the screen and write a memo to describe your purchase.
9. Select **Checkout**.

On the Workday **Checkout** screen:

In the **Requisition Information Section**:

10. Review the details added previously and edit as needed.

**NOTE**

Although not required, it is advisable to type a **Memo to Supplier** and **Internal Memo** to be able to reference your purchase requisitions easily in the future.

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In the **Goods** section:

11. If the Worktag information was not entered prior to entering the UVA Marketplace, complete the following required fields for **each of the line items bought**:
 - **Company** – auto-populates based on user.
 1. **For an Intercompany Requisition request**, change the default value and select the applicable company responsible for the requisition.
 - **Spend Category** – select the spend category relevant to your purchase from the drop-down list. (may auto-populate depending on the item)



For Capital Equipment requisitions under \$5000, use Equip NonCapital.
For Capital Equipment requisitions over \$5000, use Equip Capital.

- **Ship-To Address** – auto-populates based on user.
 1. **For an Intercompany Requisition request**, change the ship-to-address as needed.
- **Gift, Grant, Designated, or Project** – if not done on the header level, enter Worktag in one of the four options
- **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate based on the Gift, Grant, Designated, or Project Worktag).
- **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user or the Gift, Grant, Designated, or Project Worktag)
- **Function** – select the function relevant to

the purchase In the **Attachments** section:

12. Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents.



Adding attachments to your requisition is optional unless the requisition type is “Contract Request” or if it’s a non-catalog purchase over \$10,000. In these cases, an attachment is required.

13. Select **Submit** to submit your requisition.



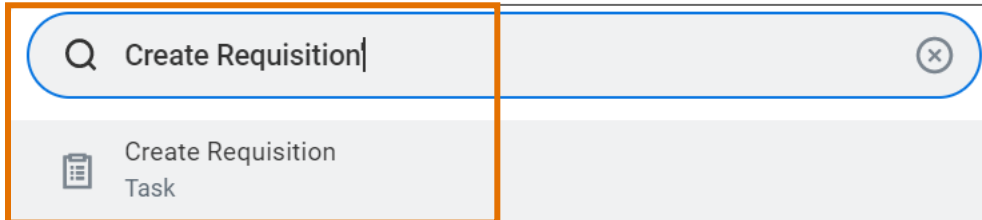
Activity Stream is available on the Requisition and the Purchase Order once it is created. Activity Stream allows you to tag colleagues within your area in comments and see all related business process events and comments. This should NOT be used instead of an AskFinance ticket. Click [HERE](#) to learn more about Activity Stream and comments.

You have successfully completed this task. It will now be routed based on the configuration.

Procedure: Create Purchase Requisition with Splits

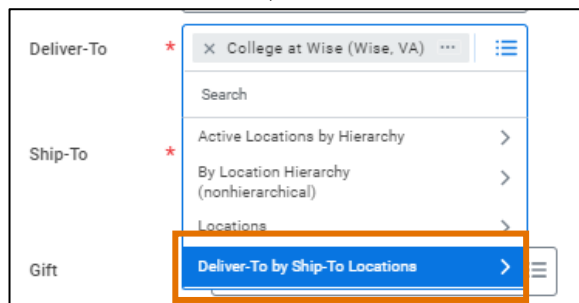
On the Workday **Home** screen:

1. Type **Create Requisition** in the search field.
2. Select **Create Requisition** from the Search Results.



On the **Create Requisition** screen:

3. Complete the following required fields:
 - **Requester** – auto-populates based on user. If the requisition is being created for someone else, change the Requester to the appropriate individual. NOTE: This is the only place to change the Requisitioner. If a change from the default is needed it MUST be done here.
 - **Company** – auto-populates based on user.
 - **Currency** – auto-populates to USD.
 - **Requisition Type** – select **Contract Request** when Spend Category Buyer review is needed, otherwise select **Standard**.
 - **Deliver-To** – auto-populates based on the employee. If you want to keep the auto-populated suggestion, this will need to be updated to include the specific building details (e.g., name and room number). To select your accurate floor and/or room level Deliver to To Address:
 - In the Deliver-To field, select the **Deliver-To Ship-To Location** category.



- In the Deliver-To Ship-To Location dropdown, select the **building** or **building address** from the list and then select either a **floor level** or a **specific room** within the floor.
- **Ship To** – auto-populates based on user. However, check the field details and update as needed. If the requisition is being created for someone else, change to the appropriate Ship To location as needed.

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Worktag information may be added at this time, or once the requisition has been sent back to Workday from the UVA Marketplace. However, if you would like the Worktag information to apply to ALL lines, it will save time to enter this information on this Header level.

4. Select **OK** to proceed.

On the second **Create Requisition** screen:

5. Review the Requisition Instructions by selecting the **Purchasing Basics** link.
6. Select **Connect to Supplier Website** to proceed.

Create Requisition

Company
The University of Virginia's College at Wise

Requester
Amanda Grace Hughes

Currency
USD

Requisition Type
1. Standard

Instructions

Requisition Instructions

Before you process your requisition, please refer to the Purchasing Basics here. If you have questions or need additional assistance, please call 434-924-4212.

<https://procurement.virginia.edu/purchasing/purchasing-basics>

Select an Option

Connect to Supplier Website

Use this link to connect to the Jaggaer Marketplace to view the available catalog and non-catalog items.

On the **Connect to Supplier Website** screen:

7. Select **Connect** to navigate to the UVA Marketplace.

Connect to Supplier Website

Company
The University of Virginia's College at Wise

Requester
Amanda Grace Hughes

Currency
USD

Requisition Type
1. Standard

Supplier Websites 1 item

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
	UVA Marketplace	Yes		UVA Marketplace	Connect

Continue Shopping



QRG links to help you navigate and shop in the UVA Marketplace can be found at the end of this QRG

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After Returning Cart to Workday, on the Workday **View Cart** screen:

8. Review the item details on the screen and write a memo to describe your purchase.
9. Select **Checkout**.

On the Workday **Checkout** screen:

In the **Requisition Information Section**:


10. Review the details added previously and edit as needed.

**NOTE**

Although not required, it is advisable to type a **Memo to Supplier** and **Internal Memo** to be able to reference your purchase requisitions easily in the future.

In the **Goods** section:

11. If the Worktag information was not entered prior to entering the UVA Marketplace, complete the following required fields for **each of the line items bought**:
 - **Company** – auto-populates based on user.
 - **For an Intercompany Requisition request**, change the default value and select the applicable company responsible for the requisition.
 - **Spend Category** – select the spend category relevant to your purchase from the drop-down list. (may auto-populate depending on the item)

**NOTE**

For Capital Equipment requisitions under \$5000, use Equip NonCapital.
For Capital Equipment requisitions over \$5000, use Equip Capital.

- **Ship-To Address** – auto-populates based on user
 - **For an Intercompany Requisition request**, change the ship-to-address as needed.

12. Select the **Split** button to split the selected Line Item which will tag the line item to more than 1 Worktag.



The screenshot shows the 'Lines' tab of the Workday View Cart screen. A line item for 'Books' with a quantity of 2 and a value of 200.00 USD is displayed. The 'Split' button, located at the end of the line item, is highlighted with an orange box. The button is labeled 'Split (0)'. Below the line item, there are radio buttons for 'Goods Line' (selected) and 'Service Line'.

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In the Splits pop-up:

13. Select **(+) Add to** add another line in the Split table. (To remove the line from the Split table, select the **(-)** icon)
14. For each line, complete the following required fields in the table:
 - **Percent or Amount** – split the total percentage/amount of the Line Item into the required number of lines.
 - **Gift, Grant, Designated, or Project** – if not done on the header level, enter Worktag in one of the four options
 - **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate based on the Gift, Grant, Designated, or Project Worktag).
 - **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user or the Gift, Grant, Designated, or Project Worktag)
 - **Function** – select the function relevant to the purchase.



The total amount must be accounted for to proceed, as shown in the Amount Split and the Remaining Amount to Split lines.

In the **Attachments** section:

15. Drag and drop any supporting documentation to the field or select the **Select Files** button to browse your documents.



Adding attachments to your requisition is optional, **unless** the requisition type is “Contract Request” or if it’s a non-catalog purchase over \$10,000. In these cases, an attachment is required.

16. Select Submit to submit your requisition.



Activity Stream is available on the Requisition and the Purchase Order once it is created. Activity Stream allows you to tag colleagues within your area in comments and see all related business process events and comments. This should NOT be used instead of an AskFinance ticket. Click [HERE](#) to learn more about Activity Stream and comments.

You have successfully completed this task. It will now be routed based on the configuration.

Procedure: Use Requisition Worktags Template While Creating Requisitions

When creating a requisition, you can use a requisition worktags template you have created to automatically populate the worktags instead of selecting worktags manually. This is useful for frequently ordered items, as you can save the worktags string in a template and use it every time you create a requisition for those items. For instructions on how to create a requisition worktags template, review the Create Requisition Worktags Template QRG.

After checking out from UVA Marketplace and returning the cart to Workday, you will be directed to the Workday **View Cart** screen where you will review the items details, write a memo, and check out to arrive at the Workday **Checkout** screen.

On the Workday Checkout screen, ensure that the Requisition Type field is populated.

In the Goods section, ensure that the Spend Category field is populated.

1. Instead of adding the Worktags for each of the line items, use the **Related Actions** menu at the bottom of the screen and select **Edit Requisition Defaults**.

The screenshot shows the 'Goods' section of the Workday View Cart screen. It displays a table with columns for Order, Company, Item, Item Description, *Spend Category, and *Quantity. Below the table, there are buttons for 'Submit', 'Save for Later', 'Continue Shopping', and a 'Related Actions' menu (indicated by three dots). The 'Edit Requisition Defaults' option is highlighted in the Related Actions menu.

On the **Edit Requisition Defaults** screen:

In the **Default Worktags and Splits** section:

2. Select **Copy from Worktags Template** radio button and then select the appropriate option as explained below:
 - **Worktags** - if you want to use a worktags template you previously created, select this option from the **Copy from Worktags Template** dropdown and then select the name of the requisition worktag template you wish to use.
 - **Split Allocations** - if you want to use a split allocations worktag template you previously created, select this option and then select the name of the split allocation requisition worktag template.

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If you have not created a requisition worktag template, you can select one of the following radio buttons:

- **Keep Current Worktags:** leaves your current worktags selections unchanged.
- **Use Default Worktags:** replaces all values on existing lines and uses the default Worktags for new lines.
- **Use Default Splits:** applies default split once to all the lines.



You can only use the requisition worktags templates that you have created yourself in Workday. Templates created by other users cannot be used.

3. Select **Apply**.

Edit Requisition Defaults

Requisition: RQ-0000000290 | Status: Draft | Total Lines: 2 | Total Amount: \$2.00 | Currency: USD

Enter default values to replace current selections on applicable requisition lines. Leave fields blank to keep the current values on the lines. New requisition lines will use the defaults you set here. You can change individual line values when editing the requisition.

Requested Delivery Date: MM/DD/YYYY

Supplier: [Dropdown]

Default Worktags and Splits

Select worktags to use for all requisition lines. Keep Current Worktags leaves your current selections unchanged. Use Default Worktags replaces all values on existing lines and uses the default worktags for new lines. Use Default Splits applies once to all lines. Copy from Worktags Template uses worktags from the selected template you've created.

☐ Keep Current Worktags
☐ Use Default Worktags
☐ Use Default Splits
☒ Copy from Worktags Template

Worktags
Split Allocations
Search

Apply Cancel

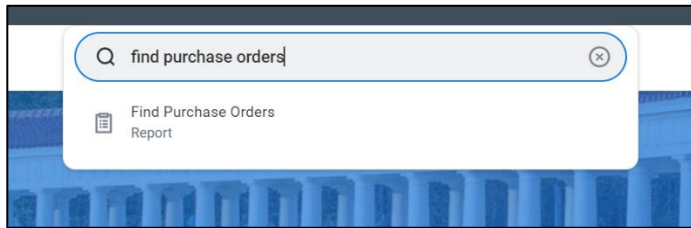
Your **Goods** lines will automatically update with the worktags according to the requisition worktags template selected.

Procedure: Find and Print Purchase Orders (Workday)

You can find and print Purchase Orders in Workday or as you have been doing in Jaggaer. Consider [printing Purchase Orders in UVA Marketplace](#), where the print format is a clear Fax version. If you print purchase orders in Workday, it will contain additional details such as worktags used. For instructions on how to print in Workday, please see below.

On the Workday **Home** screen:

1. Enter Find Purchase Orders in the search bar.
2. Select Find Purchase Orders from the search results.

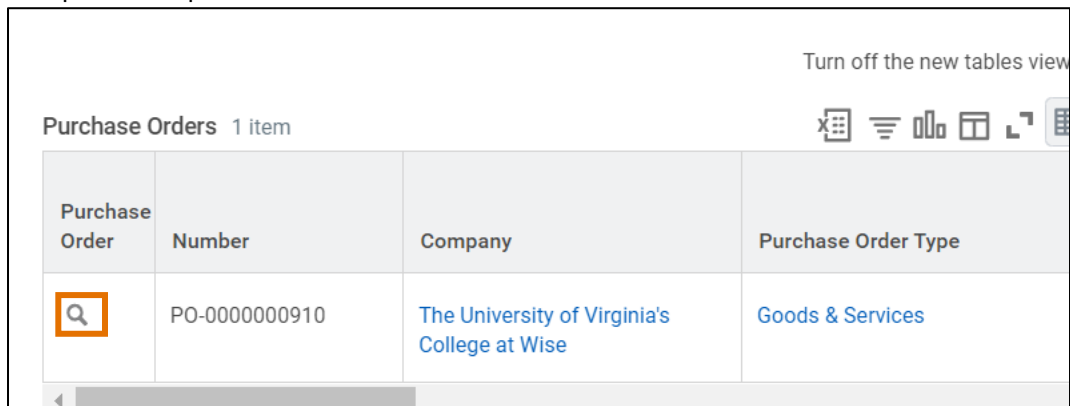


On the **Find Purchase Orders** screen:

3. Enter in field information (e.g., Company, Supplier, Document Date On or After) to narrow down your purchase order search.


On the second **Find Purchase Orders** page:

4. Search the Purchase Orders table to find the purchase order you would like to print.
5. Click the **Search** icon to navigate to the **View Purchase Order** page with the information for that particular purchase order.



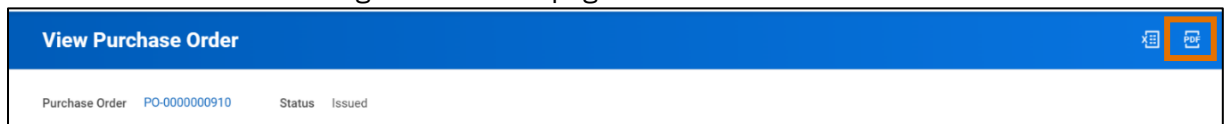
Turn off the new tables view

Purchase Orders 1 item

Purchase Order	Number	Company	Purchase Order Type
	PO-0000000910	The University of Virginia's College at Wise	Goods & Services

On the **View Purchase Order** page:

6. Select the **PDF** icon on the right hand of the page.



7. Select Download when the Export Data document is ready.
8. Open the PDF. Your purchase order is now ready to print.

QRG Links for UVA Marketplace

Use the following QRG links to help you navigate and shop in the UVA Marketplace:

- [Navigating the UVA Marketplace](#)
- [Understanding Vendors in the UVA Marketplace](#)
- [Using Icons and Helpful Tips](#)
- [Product Search in the UVA Marketplace](#)
- [Shopping with Hosted Catalog Suppliers](#)
- [Comparing Products](#)
- [Shopping with Punchout Catalog Suppliers](#)
- [Creating a Quick Order](#)
- [Working with Favorites in the UVA Marketplace](#)