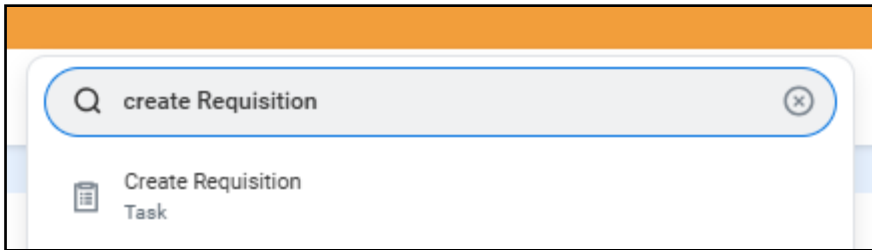


Audience / Role	Employee
Description	This job aid provides instructions to create a requisition.
Before you Start	Gather any quotes that will be required based off purchase type.
Related Job Aid(s)	Create Purchase Order (PO)

1	In the search bar, type "create requisition". Then select it. 
2	Under Create Requisition, complete the fields for this task. Enter the following into the fields: • Requester – Enter/confirm it displays the name of the person requesting. • Company – Enter/confirm it displays Kern County. • Currency – Enter/confirm it displays USD. • Requisition Type – Select a requisition type. The requisition type is used to route for correct approvals. The requisition type is also helpful when filtering for reports. Select from this list: - o Bid - o Board Approved - o Confirming - o Cooperative Agreement - o CUPPCCA \$25k-\$60k - o CUPPCCA Informal Bid \$60k-\$120k - o Emergency - o Fast Track - o Group Purchasing Organization - o Lease o Low Cost – One-Time - o Low Dollar – Blanket - o Ordering Document - o PPSA/STSA



PROCUREMENT – CREATE REQUISITION

	- o Price Agreement – Blanket - o Price Agreement – One-Time - o Rotating - o Sole Source • Deliver-To – Enter/Confirm it displays the correct location. • Ship-To – Enter/Confirm it displays the correct address. • Location – Enter/Confirm it displays the correct location. • Project Task – Enter a project if purchase is for a project. • Grant – Enter a grant if purchase is for a grant. • Cost Center – Enter/Confirm it displays the correct cost center. • Additional Worktags – Fund and Activity will default in based of Cost Center selection, select other Worktags as needed. Select OK.
3	Under Create Requisition, read the instructions and review the Kern County Procurement Policy. ▼ Instructions You can review the Procurement Policy at this link: https://www.kerncounty.com/home/showdocument?id=1400
4	Under Select an Option, select an option and proceed to that step: Search Catalog- Do not use. Request Non-Catalog Items (4a) – select to add a good or service that is not in the catalog. Connect to Supplier Website (4b)– select to request goods and services from Supplier Websites. Add from Templates and Requisitions (4c) – select from Requisition templates and past Requisitions. Select from My Procurement Favorites – Do not use. This functionality is not being utilized currently.

PROCUREMENT – CREATE REQUISITION

	Create Requisition Company Kern County Requester Dipti Pradhan Currency USD Requisition Type CUPPCCA <\$25k Instructions You can review the Procurement Policy at this link: https://www.kerncounty.com/home/showdocument?id=1400 Select an Option Search Catalog Search the internal catalog of preferred items and suppliers to add into the shopping cart Request Non-Catalog Items Add a good or service that is not in the catalog Connect to Supplier Website Request goods and services from Supplier Websites Add from Templates and Requisitions Select from Requisition templates and past Requisitions Select from My Procurement Favorites Select from my Favorite items
4a	Request Non-Catalog Items option: Select Request Goods or Request Service – • Goods are considered physical items purchased. • Service is considered an activity performed at the request of Kern County. Non-Catalog Request Type ☒ Request Goods ☐ Request Service Request Goods: Good Request Details: • Item Description – Enter Supplier Description from quote for Goods. Enter as much information as you have available to place the order. Product number, model number, color, size, service repair info, etc. • Supplier Item Identifier – Enter Supplier Item / Supplier Part number from quote. • Spend Category – Select the prompt menu>Spend Category and select the appropriate category from the list.

PROCUREMENT – CREATE REQUISITION

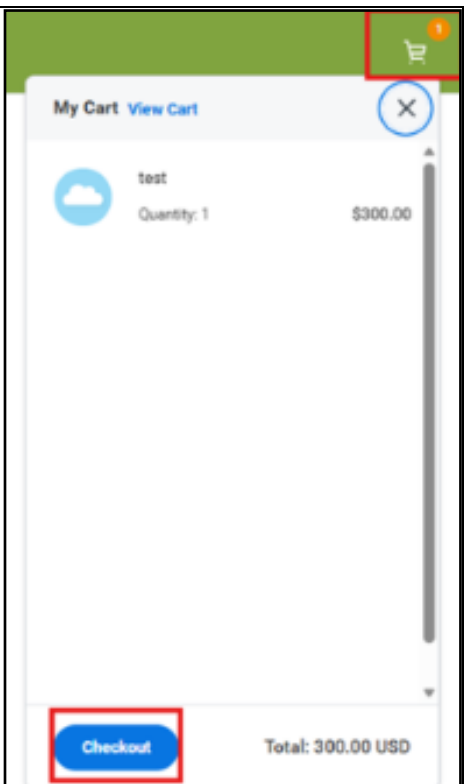
- **Supplier** – Select the prompt menu>Suppliers by Supplier Group and continue to drill into Supplier options. Select the appropriate Supplier for purchases related to a supplier contract. Most Requisition Types require the Supplier to be selected (exceptions include Bid, CUPPCCA Informal Bid \$60k - \$120k, and Fast Track Requisition Types). If the request needs to be sourced, the supplier field can be left blank.
 - o If you do not know the supplier and you want this item to be bid on by Purchasing, then leave the supplier field blank.
 - o If you cannot find the supplier, you will need to submit a request for a supplier. Use the related Job Aid Supplier Request to start this process.
- **Supplier Contract** –We are not utilizing this field currently
- **Quantity** – Enter amount.
- **Unit Cost** – enter cost.
- **Unit of Measure** – select from drop down list.
- **Extended Amount** – This will auto-populate.
- **Memo** – Optional; Enter additional information if needed.
- Confirm entries and select **Add to Cart**.
- Continue adding items until all items are included.
- **View Cart** – In the upper right corner of the page select on the **Shopping Cart**.
- Confirm the items and then select the **Checkout** button.

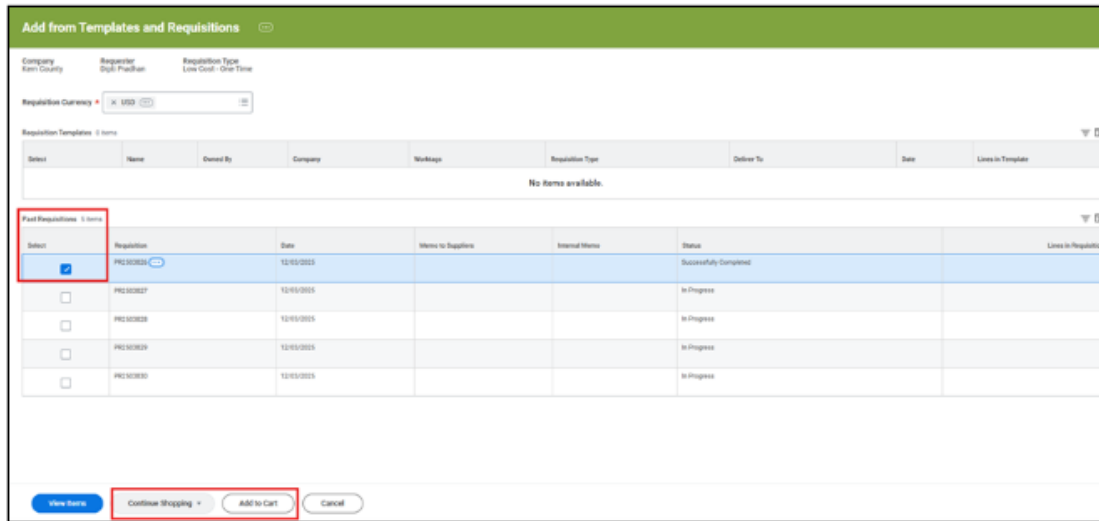
Attachment is a required field.

Request Services:

Service Request Details:

- **Description** – Enter as much information about the order.
- **Spend Category** – Select the prompt menu>Spend Category and select the appropriate category from the list.
- **Supplier** – Select the prompt menu>Suppliers by Supplier Group and continue to drill into Supplier options. Select the appropriate Supplier for purchases related to a supplier contract. If the request needs to be sourced, then the supplier field can be left blank.
 - o If you do not know the supplier and you want this item to be bid on by Purchasing, then leave the supplier field blank.
 - o If you cannot find the supplier, you will need to submit a request for a supplier. Use the related Job Aid Supplier Request to start this process.

	• Supplier Contract – We are not utilizing this field currently. • Start Date – Enter the desired start date of the service. • End Date – Enter the anticipated end/completion date of the service. • Extended Amount – Enter the amount of the service anticipated spend. • Memo – (Optional) Enter additional information if needed. Confirm entries and select Add to Cart. Continue adding items until all items are included. View Cart – In the upper right corner of the page select on the Shopping Cart. Confirm the items and then select the Checkout button.	
4b	Connect to Supplier Website option: This allows you to use “Punch Outs” to order goods and services directly from a Supplier Website. Choose the vendor you wish to purchase from and select on their Connect button. We are currently supporting Grainger and Stinson. Once the page has loaded, you can shop on the site exactly as you would normally. When you are finished adding items to your cart, navigate to the cart and select Submit Cart This will send the data to Workday. Continue navigating through until you Submit for approval.	
4c	Add from Templates and Requisitions option: Under the Add from Template and Past Requisitions screen, select boxes from Requisition Templates table options and Past Requisitions table options that you want to add to your cart.	



Select **Add to Cart** or **Continue Shopping**. Add items from the same supplier to the requisition.

If you select **Continue shopping** it will give you options 4a to 4c as mentioned above. Add items from the Same Supplier to the Cart.

Description is the required field. Enter the description and then proceed to **Checkout**.

5 On Checkout page, under **Requisition Information**, enter the following into the fields:

- **Request Date** – Date of Requisition, not a delivery or due date.
- **Requisition Type** – This is required. It may auto populate depending on which requisition option you completed in step 4.
- **Sourcing Buyer** – Select a buyer for the purchase. This is a required field.
- **Freight Amount** – Freight is added in the requisition header for the entire order.
- **Memo to Suppliers** – Enter special instructions or information for the supplier on the order. Enter County contact name and phone or email. This information will be printed on the Purchase Order.

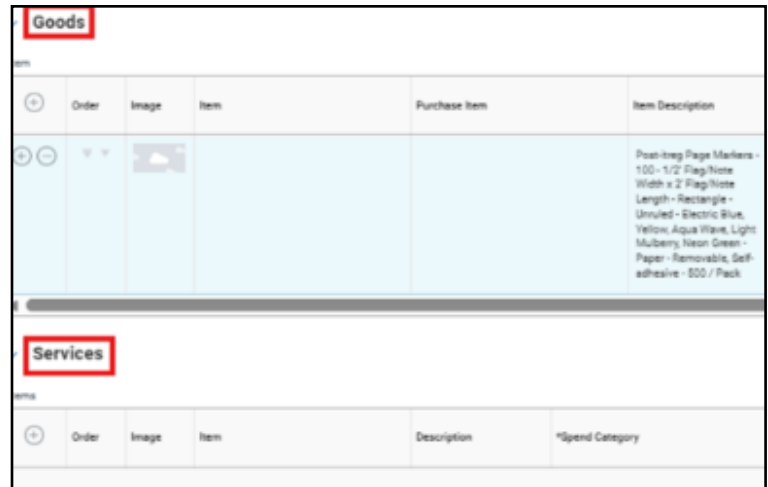
Internal Memo – Enter justification for the purchase: Include additional notes for Purchasing. This information does not print on the PO.

6 Scroll down to the Lines section at the bottom of the requisition to update information about goods and services.

Under **Goods** confirm or enter the following:

- **Item Description** – Confirm data is correct.
- **Spend Category** – Enter a spend category. It is a required field.
- **Quantity, Unit of Measure** – Confirm data is correct.
- **Unit Cost** – Confirm data is correct. (Extended Amount will auto populate)

- **Deliver To** – Confirm data is correct.
- **Ship-To Address** and **Ship-To Contact** – Confirm data is correct. Update as appropriate.
- **Requested Delivery Date** – Enter the desired date to receive the items.
- **Supplier** – Confirm data is correct. Leave it blank if not determined at this time.
- **Supplier Contract**– Connect to a Supplier Contract if appropriate.



- **Supplier Item Identifier** – Confirm data is correct
- **Tax** – Enter Tax Applicability and Tax Code, if applicable. Tax information is required on all punch-out requisition lines.
- **Memo** – Add information specific to the line item to be printed on the PO.
- **Fund and Cost Center** - Confirm data is correct. Update if necessary.
- **Project Task** – Enter Project info, if applicable.
- **Additional Worktags** – Enter any additional worktags such as a Grant, select on the prompt menu to search for the worktag by type or type in the worktag. Hit enter to select.
- **Splits** – (Optional) Select the Splits button at the end of the line item.
 - In the Split by field, select Amount or Quantity based on how you want to split the cost.
 - Select the + sign in the top left corner to add the number of lines that need to be split.
 - Enter costing information for each line and adjust the quantity or amount until the remaining quantity or amount split equals zero.

To add another Goods Line, Select on the “+” at the beginning of the Line. To delete a line, select the “-” at the beginning of the line to be deleted.

Under **Services** confirm or enter the following:

- **Item** – Leave blank.
- **Description** – Confirm data is correct.
- **Spend Category** – Confirm data is correct.
- **Extended Amount** - Confirm data is correct.
- **Start Date / End Date** - Confirm data is correct.
- **Deliver To** – Confirm data is correct.
- **Ship-To Address** and **Ship-To Contact** – Confirm data is correct. Update as appropriate.
- **Supplier** – Confirm data is correct. Leave it blank if not determined at this time.
- **Supplier Contract**– Connect to a Supplier Contract if appropriate.
- **Tax** – Enter Tax Applicability and Tax Code, if applicable. Tax information is required on all punch-out requisition lines.
- **Memo** – Add information specific to the line item to be printed on the PO.



PROCUREMENT – CREATE REQUISITION

- **Fund and Cost Center** - Confirm data is correct. Update if necessary.
- **Project Task** – Enter Project info, if applicable.
- **Additional Worktags** – Enter any additional worktags such as a Grant, select on the prompt menu to search for the worktag by type or type in the worktag.
- **Splits**– (Optional) Select the Splits button at the end of the line item.
 - In the Split by field, select Amount or Quantity based on how you want to split the cost.
 - Select the + sign in the top left corner to add the number of lines that need to be split.

Enter costing information for each line and adjust the quantity or amount until the remaining quantity or amount split equals zero.

What Happens Next?

- The accounting journal request routes for review and approval. Additional conditional approvers depend on details of journal.
 - Cost Center Manager (Will route to each respective Cost Center Manager include on transaction)
 - Project Manager (If “Project Task” worktag was included on transaction)
 - Grant Manager (If “Grant” worktag was included on transaction)
- The journal is then routed for a budget check and sent to a Budget Manager if the budget check fails
- Once approved by all involved parties, Workday creates and posts the journal
- To view the business process steps taken and overall status: navigate to the Process History tab

Related Reports

Find Journals