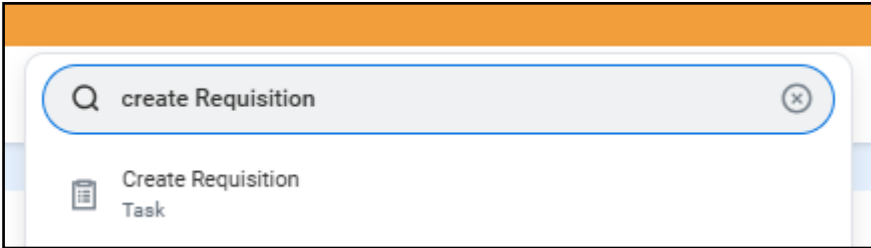


TITLE: PROCUREMENT -CREATE REQUISITION

Description	This job aid provides instructions to create a requisition.
Before you Start	Gather any quotes that will be required based off purchase type. Identify your Sourcing Buyer based on the Kern County Procurement policy.

CREATE REQUISITION

1	In the search bar, enter Create Requisition. In the search results, select the Create Requisition task. 
2	Under Create Requisition, complete the fields for this task. Enter the following into the fields: • Requester – enter or confirm it displays the name of the person requesting • Company – will default to Kern County • Currency – will default to USD • Requisition Type – select a requisition type which is used to route for correct approvals and filtering report • Deliver-To – enter or confirm it displays the correct location • Ship-To – enter or confirm it displays the correct address • Location – enter or 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 – will default to the requester associated cost center – enter or confirm • Additional Worktags – the activity and fund will default based off cost center selection - select other worktags as needed. Select OK.

TITLE: PROCUREMENT -CREATE REQUISITION

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 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	If using the Request Non-Catalog Items option, follow the steps below.

TITLE: PROCUREMENT -CREATE REQUISITION

Select **Request Goods** or **Request Service** – Goods are considered physical items purchased and service is considered an activity performed at the request of Kern County

If selecting **Request Goods**, under **Good Request Details** enter the information into the fields:

- **Item Description** – enter the supplier description from quote for goods - enter as much information as you have available to place the order including product number, model number, color, size, service repair info, etc.
- **Supplier Item Identifier** – enter the supplier item or part number from quote
- **Spend Category** – select or type in the appropriate spend category from the list
- **Supplier** – select or type in the supplier
 - If you do not know the supplier and you want this item to be bid on by Purchasing, then leave the supplier field blank
 - If you cannot find the supplier, submit a request for a supplier using the Create Supplier Request task
- **Quantity** – enter amount
- **Unit Cost** – enter cost
- **Unit of Measure** – select from the list
- **Extended Amount** – will auto-populate
- **Memo** – optional, enter additional information

Select **Add to Cart**. Continue adding items until all items are included. In the upper right corner of the page select on the **Shopping Cart**. Confirm the items and then select the **Checkout** button. Note that an **Attachment** is required.

Non-Catalog Request Type

- ☒ Request Goods
☐ Request Service

Non-Catalog Request Type

- ☒ Request Goods
☐ Request Service

Goods Request Details

Item Description	*	
Supplier Item Identifier		
Spend Category	*	
Supplier		
Supplier Contract		(empty)
Quantity	*	0
Unit Cost		0.00
Unit of Measure	*	select one
Extended Amount		0.00
Memo		

Continue Shopping

Add to Cart

Cancel

TITLE: PROCUREMENT -CREATE REQUISITION

If selected **Request Services**, under **Service Request Details** enter the information into the fields:

- **Description** – enter as much information about the order
- **Spend Category** – select or type in the appropriate spend category from the list
- **Supplier** – select or type in the supplier
 - If you do not know the supplier and you want this item to be bid on by Purchasing, then leave the supplier field blank
- If you cannot find the supplier, submit a request for a supplier using the Create Supplier Request task
- **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

Select **Add to Cart**. Continue adding items until all items are included.

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

Memo

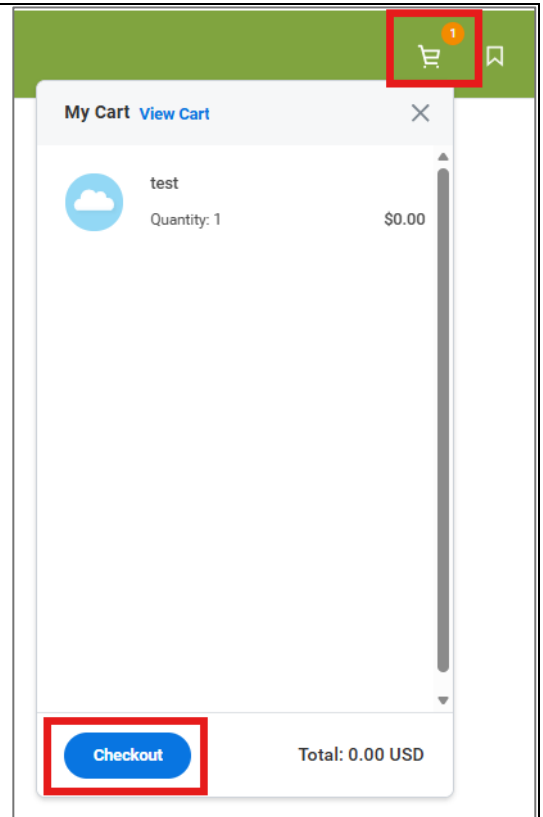
Continue Shopping

Add to Cart

Cancel

TITLE: PROCUREMENT -CREATE REQUISITION

In the upper right corner of the page select on the **Shopping Cart**. Confirm the items and then select the **Checkout** button. Note that an **Attachment** is required.



4b The **Connect to Supplier Website** option, allows you to use “Punch Outs” to order goods and services directly from a supplier website – we are currently supporting Grainger and Stinson’s.

Choose the vendor you wish to purchase from by selecting the **Connect** button.

Connect to Supplier Website ×

Company: Kern County Requester: Janea Roberts Currency: USD Requisition Type: Low Cost - One-Time

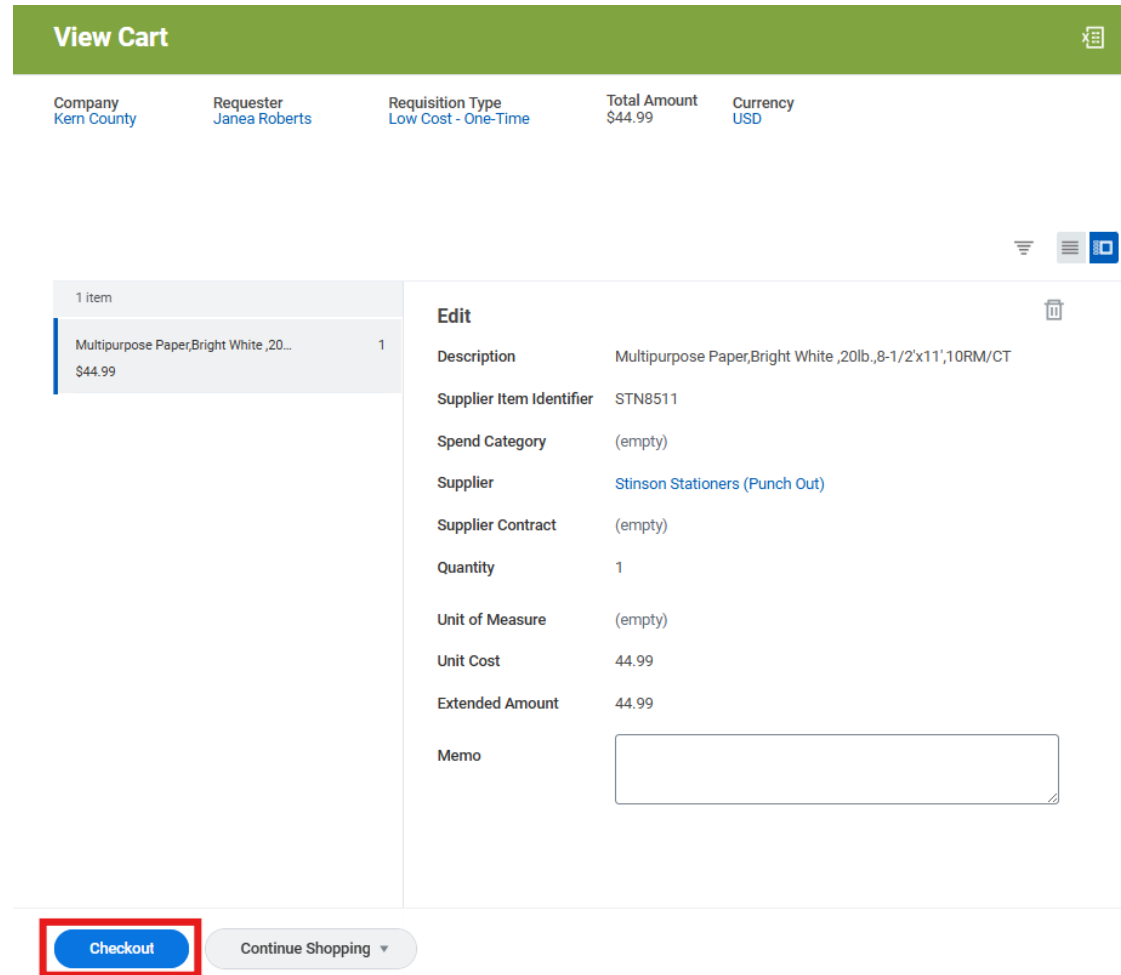
Supplier Websites: 2 items

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	Connect
	Grainger	☐	W W Grainger, Inc	Connect and Punchout to Grainger	Connect
	Stinsons	☐	Stinson Stationers (Punch Out)	Connect and Punchout to Stinsons	Connect

Once the page has loaded, you can shop on the site exactly as you would normally.

TITLE: PROCUREMENT -CREATE REQUISITION

When you are finished adding items to your cart, navigate to the cart and select **Submit Cart**. This will send the data to Workday on the **View Cart** page. Proceed with your purchase by selecting **Checkout**.



4c If using the **Add from Templates and Requisitions** option, select the past requisitions that you want to add to your cart. **NOTE:** Items must be from the same supplier.

Select **Add to Cart**.

If you select **Continue Shopping** it will give you the options mentioned above. You may continue to add items from the same supplier.

When you are finished adding items to your cart, navigate to the cart and select **Checkout**.

TITLE: PROCUREMENT -CREATE REQUISITION

Checkout				
Company	Requester	Requisition	Status	Total Amount
✓ Shipping Address Deliver-To Kern County > Archive Of Used Workspaces > WORK SPACE - BAK: Public Services Building Ship-To Address 1115 Truxtun Ave Bakersfield, CA 93301 United States of America ✓ Requisition Information Request Date * 05 / 22 / 2026  Currency * x USD  Requisition Type x Low Dollar - Blanket  High Priority ☐ Sourcing Buyer *  Submitted by Alexa Hembree Freight Amount 0.00 Other Charges 0.00 Memo to Suppliers  Internal Memo 				
6	Scroll down to the Goods and Services section at the bottom of the requisition to confirm and/or update information on each line. Under Goods confirm or enter the following – this information may auto-populate: • Item Description • Spend Category • Quantity • Unit of Measure • Unit Cost • Deliver-To • Ship-To Address • Ship-To Contact • Requested Delivery Date • Supplier – leave blank, if not determined at this time			

TITLE: PROCUREMENT -CREATE REQUISITION

- **Supplier Contract** – leave blank, if contract does not exist
- **Supplier Item Identifier**
- **Tax Applicability** and **Tax Code** - tax information is required on all punch-out requisition lines
- **Memo** – add information specific to the line item to be printed on the purchase order
- **Location** – enter Kern County
- **Project Task** – leave blank, if not tied to project
- **Grant** – leave blank, if not tied to grant
- **Cost Center**
- **Additional Worktags** – enter any additional worktags such as a grant
- **Splits** – optional, select the **Splits** button at the end of the line item and 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 the + (add row) at the beginning of the line. To delete a line, select the - (remove row) at the beginning of the line to be deleted.

Under **Services** confirm or enter the following – this information may auto-populate:

- **Item** – leave blank
- **Description**
- **Spend Category**
- **Extended Amount**
- **Start Date / End Date**
- **Deliver To**
- **Ship-To Address**
- **Ship-To Contact**
- **Supplier** – leave blank, if not determined at this time
- **Supplier Contract** – leave blank, if contract does not exist
- **Tax**
- **Memo** – add information specific to the line item to be printed on the PO
- **Location** – enter Kern County
- **Project Task** – leave blank, if not tied to project
- **Grant** – leave blank, if not tied to grant
- **Cost Center**
- **Additional Worktags** – enter any additional worktags such as a grant
- **Splits** – optional, select the **Splits** button at the end of the line item and 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

TITLE: PROCUREMENT -CREATE REQUISITION

	Goods <table border="1"> <thead> <tr> <th>Order</th> <th>Image</th> <th>Item</th> <th>Purchase Item</th> <th>Item Description</th> <th>*Spend Category</th> <th>*Quantity</th> <th>Unit Cost</th> <th>Extended Amount</th> <th>Deliver-To</th> <th>*Ship-To Ad</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>X 10015C - Land</td> <td>1</td> <td>10.00</td> <td>10.00</td> <td>X Kern County</td> <td>X 1111 Bala...</td> </tr> </tbody> </table> Services <table border="1"> <thead> <tr> <th>Order</th> <th>Image</th> <th>Item</th> <th>Description</th> <th>*Spend Category</th> <th>Extended Amount</th> <th>Date</th> <th>Deliver-To</th> <th>*Ship-To Address</th> <th>Ship-To Contact</th> <th>Supplier</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td>0.00</td> <td>Start Date MM / DD / YYYY</td> <td>X Kern County</td> <td>X 1115 Truettin Ave Bakersfield, CA 93301 United States of America</td> <td></td> <td>Supplier</td> </tr> </tbody> </table>	Order	Image	Item	Purchase Item	Item Description	*Spend Category	*Quantity	Unit Cost	Extended Amount	Deliver-To	*Ship-To Ad						X 10015C - Land	1	10.00	10.00	X Kern County	X 1111 Bala...	Order	Image	Item	Description	*Spend Category	Extended Amount	Date	Deliver-To	*Ship-To Address	Ship-To Contact	Supplier						0.00	Start Date MM / DD / YYYY	X Kern County	X 1115 Truettin Ave Bakersfield, CA 93301 United States of America		Supplier
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7	Attachment is required, navigate to the attachment box and click Select files. Attachments Drop files here or Select files																																												
8	Select Submit.																																												

What Happens Next?

- The requisition is routed for review and approval.
- After the requisition is approved, the requisition gets sourced to a Purchase Order.
- Kern County employees can create receipts against Purchase Orders (PO) once goods and services are received.
- The Process History tab updates with the requisition event, status, and completion information.

Related Reports

- Find Requisitions
- My Requisitions
- Requisition Worklet

Related Job Aids

- Create Purchase Order (PO)