

**Create Purchase Requisition Overview**


This Quick Reference Guide (QRG) is designed to walk a **Procurement Shopper** through the process of acting on a shopping cart from the UVA Marketplace that has been assigned to you by an Employee as Self. By the end of this QRG, you will be able to successfully create a requisition for UVA Marketplace items that an Employee as Self has put into a shopping cart and assigned to you to complete the processing by entering all the pertinent information and worktags.

**Procedure**

You will receive an email notification that a cart has been assigned to you in the UVA Marketplace. This notification will have the details that the requester supplied when the cart was assigned. It is important to know before you begin who the requester is and what FDM worktags need to be assigned to the items. Knowing the FDM worktag information prior to beginning the process will allow you to assign the worktags on the header level, which will save you from having to add them to each individual line item, in the case of a multiple line order.

On the Workday **Home** screen:

1. Type **Connect to Supplier Website** in the search field.
2. Select the **Connect to Supplier Website** result.
3. Complete the following required fields:
  - **Requester** – initially auto-populates to you as the user. Since this order is being completed for someone else, change the requester name to that individual. **NOTE: This is the only place to change the Requester. If a change from the default is needed it MUST be done here.**

 <p><b>NOTE</b></p>	<p>For purchase orders over \$10,000, an invoice verification notice will be sent to the Requester for invoice approval. This invoice approval must be completed before the supplier invoice will be paid. The invoice approval verifies that the goods or services, as shown on the invoice, have been fully received. The listed Requester should be an individual that is able to verify receipt of the goods or services.</p>
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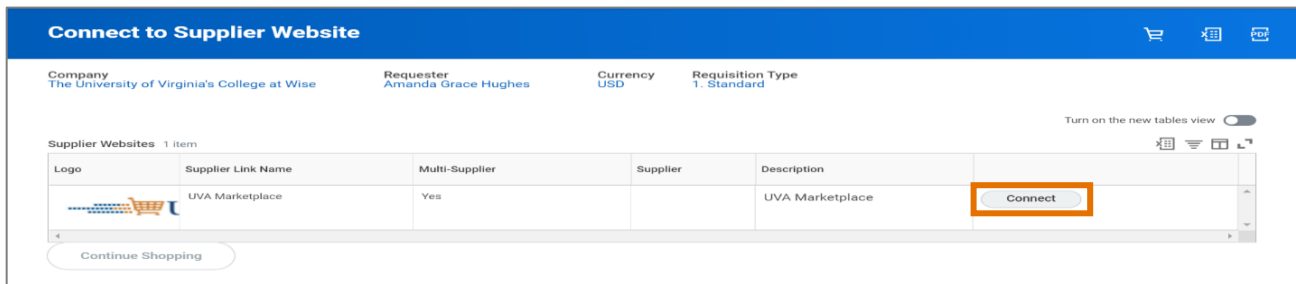
- **Company** – auto-populates to reflect entered Requester. Since this order is being completed for someone else, make sure that the Company reflects the Requester’s Company.
- **Currency** – auto-populates to USD.
- **Requisition Type** – select **Contract Request** when Spend Category Buyer review is needed, otherwise select **Standard**.
- **Deliver To** – auto-populates to reflect entered Requester. Since this order is being completed for someone else, make sure that the Deliver To location reflects the location that the Requester needs the order to be delivered.
- **Ship To** – auto-populates to reflect the entered Requester. Since this order is being completed for someone else, make sure that the Ship To location reflects the location that the Requester needs the order to be shipped to.

**NOTE** 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 **Connect to Supplier Website** screen:

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

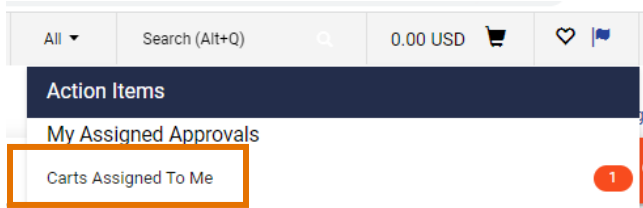


On the UVA Marketplace home screen:

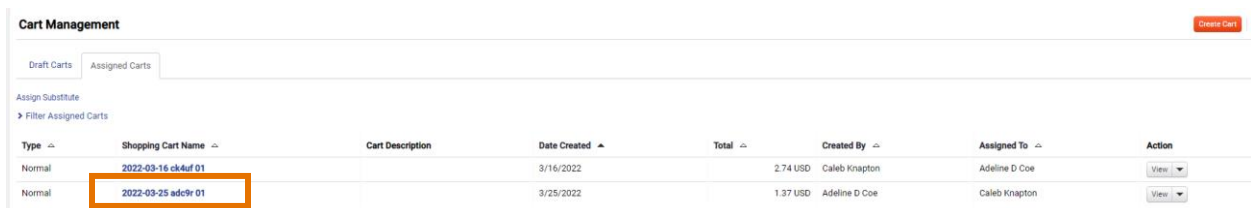
6. Click on the Action Items notification in the upper right corner of the screen:



7. Click on **Carts Assigned to Me**.



8. Click on the **Shopping Cart Name** that you need to act upon



9. The Shopping Cart information displays. You are now able to act on the items in the same manner you would if you had added them to your own cart.
  - a. If you wish to proceed with ordering these items, click **Submit to Workday**.
  - b. If you wish to return the cart to the requester, click **Return to Cart**, add a note as to the reason you are returning the cart, and click **Return**.


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

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

On the Workday **Checkout** screen:

In the **Requisition Information Section**:

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

 <b>NOTE</b>	Although not required, it is advisable to type a <b>Memo to Supplier</b> and <b>Internal Memo</b> to be able to reference your purchase requisitions easily in the future.
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In the **Goods** section:

13. 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)
  - **Ship-To Address** – auto-populates based on user
    - **For an Intercompany Requisition request**, change the ship-to-address as needed.
  - **Gift, Grant, Designated, or Project**
  - **Fund** – select the fund from which resources will be drawn for this purchase (may auto-populate depending on the user and the item).
  - **Cost Center** – select the Cost Center that represents the requestor (may auto-populate based on the user)
  - **Function** – select the function relevant to the purchase

In the **Attachments** section:

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

**NOTE**

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.

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

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