# Requisition – Employee as Self

April 2022

Finance Strategic Transformation

University of Virginia

# Introduction | Course Agenda

| Agenda | |
|---|---|
| 1 | Initiate a Requisition |
| 2 | Approve a Supplier Invoice |
| 3 | Run My Requisitions Report |
| 4 | Course Wrap-Up |

# Introduction | Course Objectives

After completing this course, you will be able to:

- Understand the roles of Workday and the UVA Marketplace in creating requisitions
- Understand the process flow of the requisitioning process
- Successfully complete the *Create* and *Assign a Cart* functions
- Successfully approve a supplier invoice for which you are listed as the Requester
- Successfully run the My Requisitions report and understand how the report's data can be utilized

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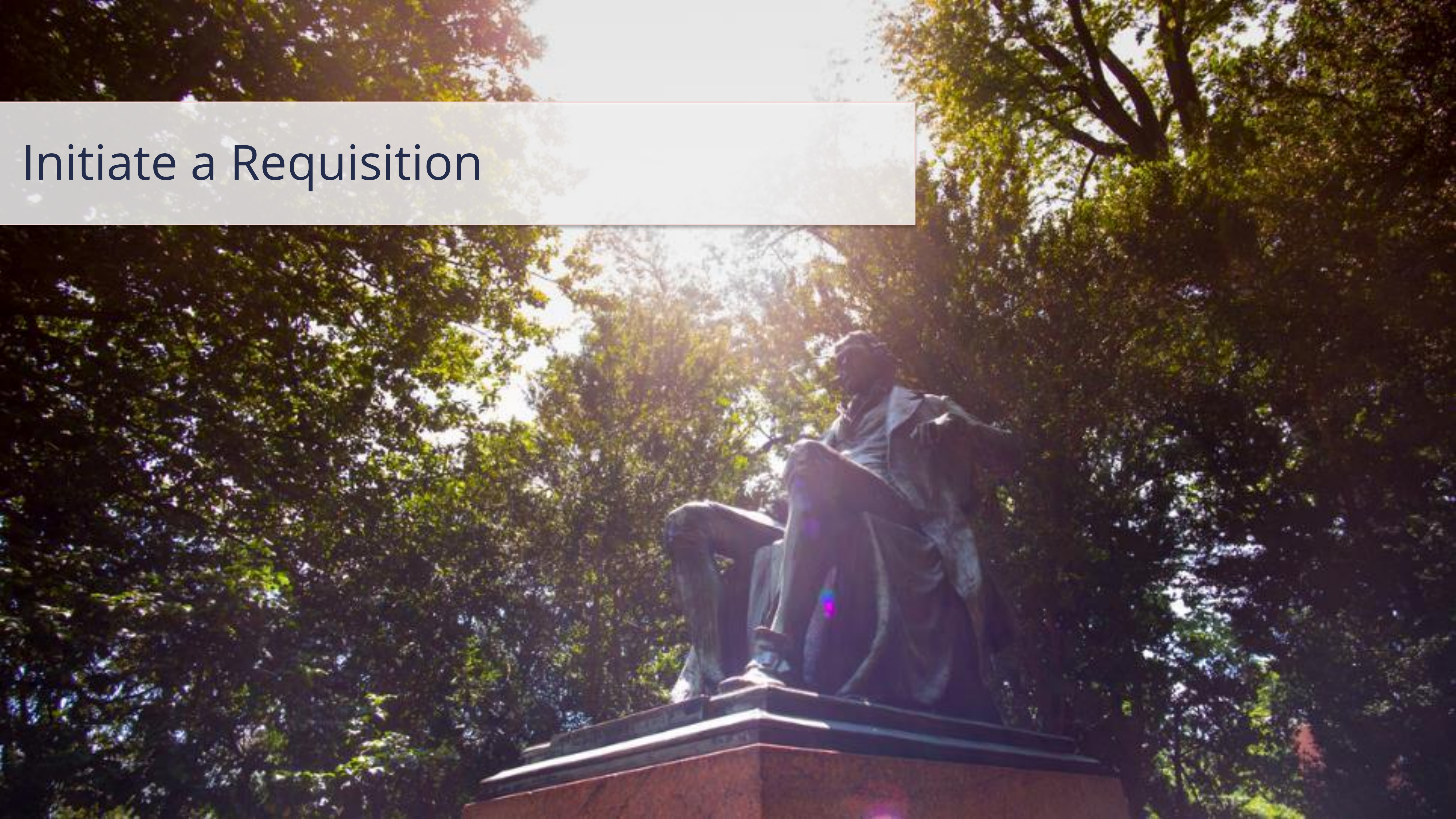
# Initiate a Requisition



# Requisitions Overview | Key Terms

| Workday Term | Definition |
|---|---|
| **UVA Marketplace** | A repository of supplier catalogs and supplier website links used to purchase goods for UVA academic and business purposes |
| **Employee as Self** | From a requisition standpoint, an Employee as Self has access to the UVA Marketplace to “window shop”, but they do not have the purchasing authority to create requisitions |
| **Procurement Shopper** | From a requisition standpoint, a Procurement Shopper has access to the UVA Marketplace and has the purchasing authority to create requisitions |
| **Requester** | The person who requests a requisition to be made |
| **Requisitioner** | The person who completes the requisition request |
| **Invoice Approval** | An action taken by a Purchase Order (PO) requester to approve an invoice for payment |

# Requisitions Overview | Requisition Creation

**Any employee can create and assign a cart to a Procurement Shopper**.

A **Procurement Shopper** will add the needed order information and accounting Worktags to create a **Requisition**, which will become a purchase order, to **procure goods and services**.

There are two scenarios in which a Procurement Shopper can create a requisition. The Procurement Shopper can create a cart, check out a cart, and create a requisition themselves, or they may be assigned a cart to check out and create a requisition for. Creating and assigning a cart will be the focus of this section of the course.

**Create and Assign a Cart**

*Any employee can create a cart and assign it to a Procurement Shopper.*

**Create a Requisition**

*Only Procurement Shoppers can create a requisition, which occurs after the cart has been created.*

# Requisitions Overview | What are the Benefits?

### Greater Autonomy for Employees

>>>>>>>>>>>>

The Create & Assign a Cart functionality in Workday allows any employee to access the UVA Marketplace and add items to their cart, rather than relying on a Procurement Shopper to identify and add the items they need.

### Enhanced Reporting

>>>>>>>>>>>>

The Find Requisitions report in Workday allows for an enhanced and user-friendly reporting experience.

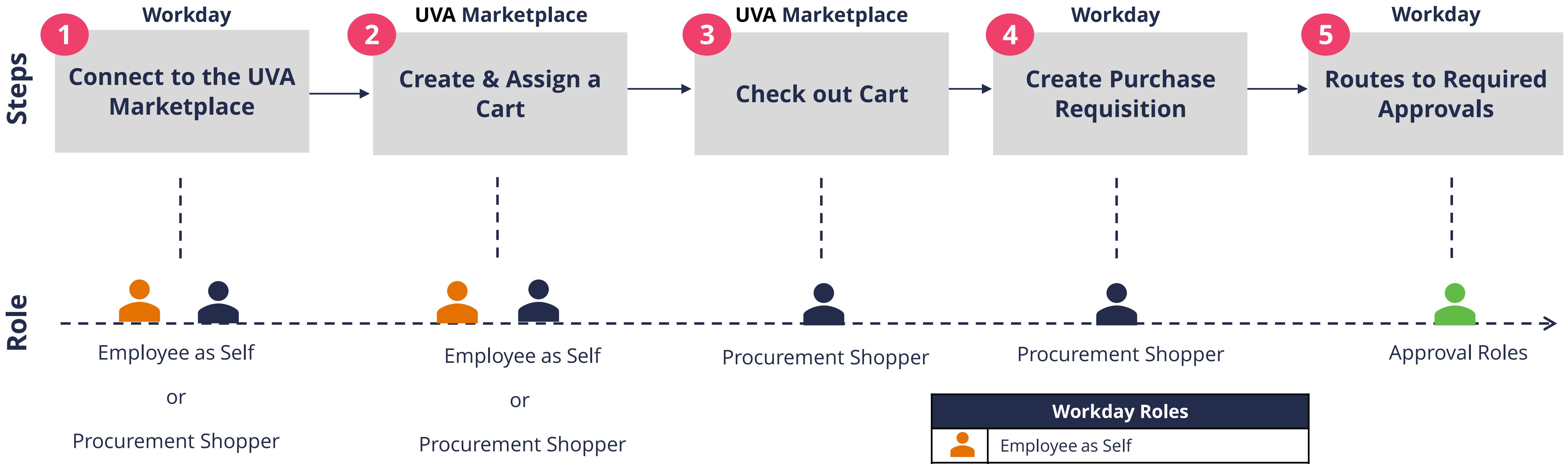
### Structured Approval

>>>>>>>>>>>>

The Requisition functionality in Workday has a structured approval process to ensure that a requisition is routed to the individual(s) best suited to evaluate it.

# Requisitions Overview | High-Level Process Overview

The following represents a **high-level look** into the **steps** and **roles** involved in **creating a requisition**. Any employee can complete steps 1 and 2 of the process, passing the request onto the Procurement Shopper and Approvers to complete the remaining steps. Alternatively, Procurement Shoppers can complete steps 1-4, creating a cart for themselves or on behalf of another employee, as long as that employee informs the Procurement Shopper of the items they wish to purchase.




| Workday Roles | |
|---|---|
| (orange icon) | Employee as Self |
| (dark blue icon) | Procurement Shopper |
| (green icon) | Approval Roles |

# Requisitions Overview | Employee as Self Role

All employees can **create a shopping cart** for themselves in Workday and **assign** that cart to a Procurement Shopper to check out and create a requisition.

**Steps**

1. **Workday** — **Connect to the UVA Marketplace** → Role: Employee as Self
2. **UVA Marketplace** — **Create & Assign a Cart** → Role: Employee as Self
3. **UVA Marketplace** — **Check out Cart** → Role: Procurement Shopper
4. **Workday** — **Create Purchase Requisition** → Role: Procurement Shopper
5. **Workday** — **Routes to Required Approvals** → Role: Approval Roles

**Role**

| Workday Roles |
| --- |
| Employee as Self |
| Procurement Shopper |
| Approval Roles |

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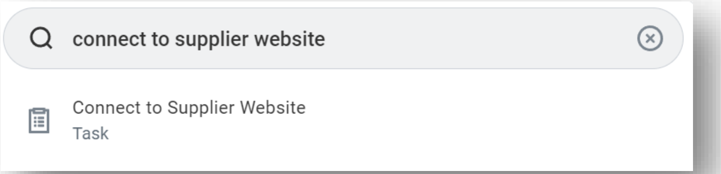
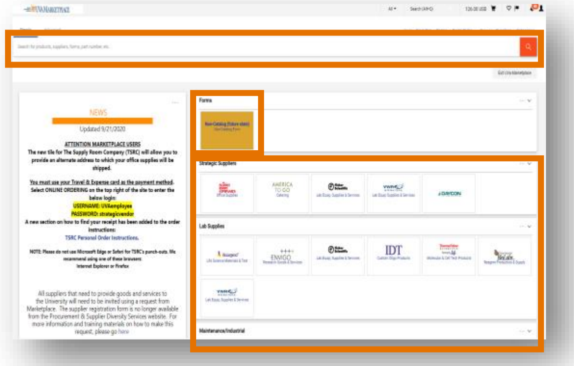
# Create and Assign a Cart Overview | What are the Key Steps?

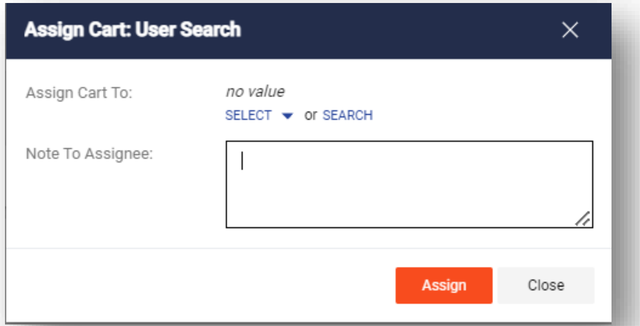
## Connect to the UVA Marketplace




## Create Cart



## Assign Cart




OVERVIEW

**Employee** will connect to the **UVA Marketplace** from Workday.

**Employee** will add items they wish to purchase to their cart.

**Employee** can purchase **catalog items** or **non-catalog items** from the UVA Marketplace.

**Employee** will review the cart and **assign** it to a Procurement Shopper.

**Employee** can add a note to the Assignee with details about the purchase order.

**CONNECT** | **CREATE** | **ASSIGN**

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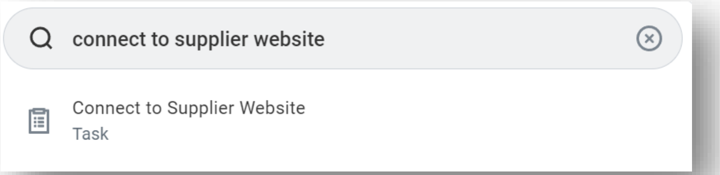
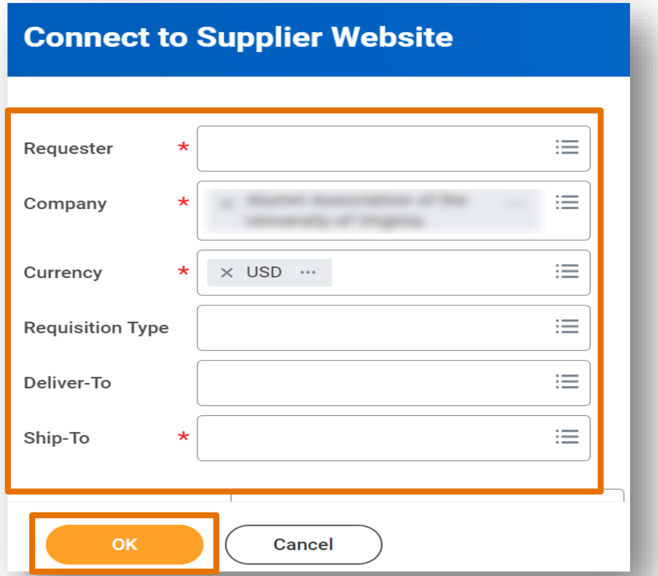
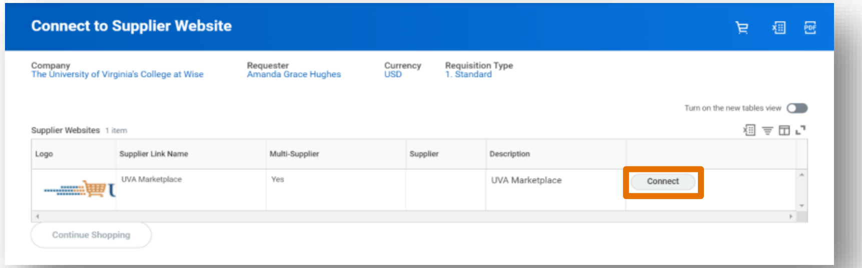
# Create and Assign a Cart Overview | Connect to UVA Marketplace




To connect to the UVA Marketplace, search *Connect to Supplier Website* in the Workday taskbar.




Required fields auto-populate based on your employee profile. Since the Procurement Shopper will enter the Worktags as they complete the requisition, **leave the remaining fields blank**. Select **OK**.




Selecting **Connect** will navigate you from Workday to the UVA Marketplace, where you can add items to your shopping cart and assign your cart to a Procurement Shopper.

**OVERVIEW**

**Employee** will connect to the **UVA Marketplace** from Workday.

**CONNECT**

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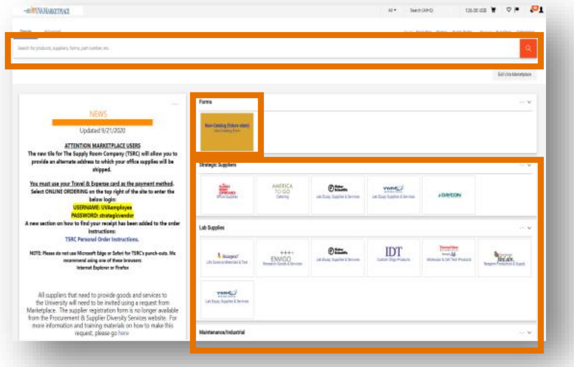
# Create and Assign a Cart Overview | Create Cart

## Create Cart



**OVERVIEW**

**Employee** will add items they wish to purchase to their cart.

**Employee** can purchase **catalog items** or can purchase **non-catalog items** from the UVA Marketplace.

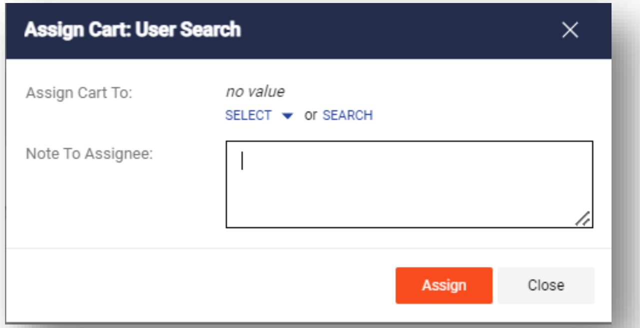
**CREATE**

Employees can purchase **catalog items** from the 60+ suppliers who are setup in the UVA Marketplace with contracted catalog items (common UVA purchases).

Employees may also purchase **non-catalog items.** Employees purchasing non-catalog items will be required to fill out a Non-Catalog Order Form. This is less common than purchasing catalog items.

# Create and Assign a Cart Overview | Assign Cart

## Assign Cart




OVERVIEW

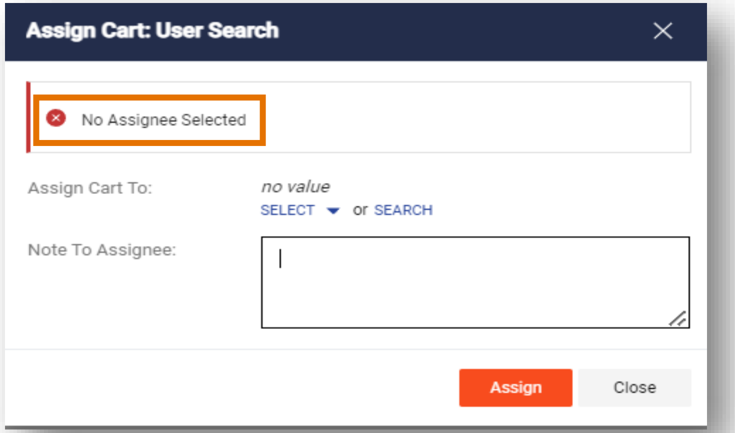
**Employee** will review cart and **assign** it to a Procurement Shopper.

**Employee** can add a note to the Assignee with details about the purchase order.

**ASSIGN**

Employees assign a cart in the UVA Marketplace by selecting from a list of Procurement Shoppers.

- If you know that you will be consistently assigning carts to the same Procurement Shopper, check the **Add to Profile** checkbox. This will add the Procurement Shopper's name to the pre-populated list under the **Select** dropdown menu.
- An error message alerting you that no assignee has been selected will appear if you do not select a Procurement Shopper from the **Select** or **Search** list.




Choose a Procurement Shopper from the **Select** or **Search** list before selecting the **Assign** button.

# Create and Assign a Cart | Key Considerations

**Manual Search –** When assigning a cart, select **Search** to manually enter details of the assignee. When entering these details manually, type the **Last Name** and **First Name** of the assignee in the respective fields and then select **Search**. From the search results, select the relevant user by clicking on the **(+)** icon.

- *Note: Only people with the security role of Procurement Shopper will appear in the **Assign Cart To** search list.*

**Notes for Assignee –** Once you have selected the assignee, type any comments or notes you have for them in the **Note to Assignee** field. While this is not a required field, it is highly recommended that you provide the assignee with any necessary information, such as accounting Worktags, deliver to location information, etc., to help them to properly process your cart.

- *Note: The **Note to Assignee** field is limited to 1000 characters.*

# Demonstration | Create and Assign a Cart

- In this demonstration, you will see how to create and assign a cart.

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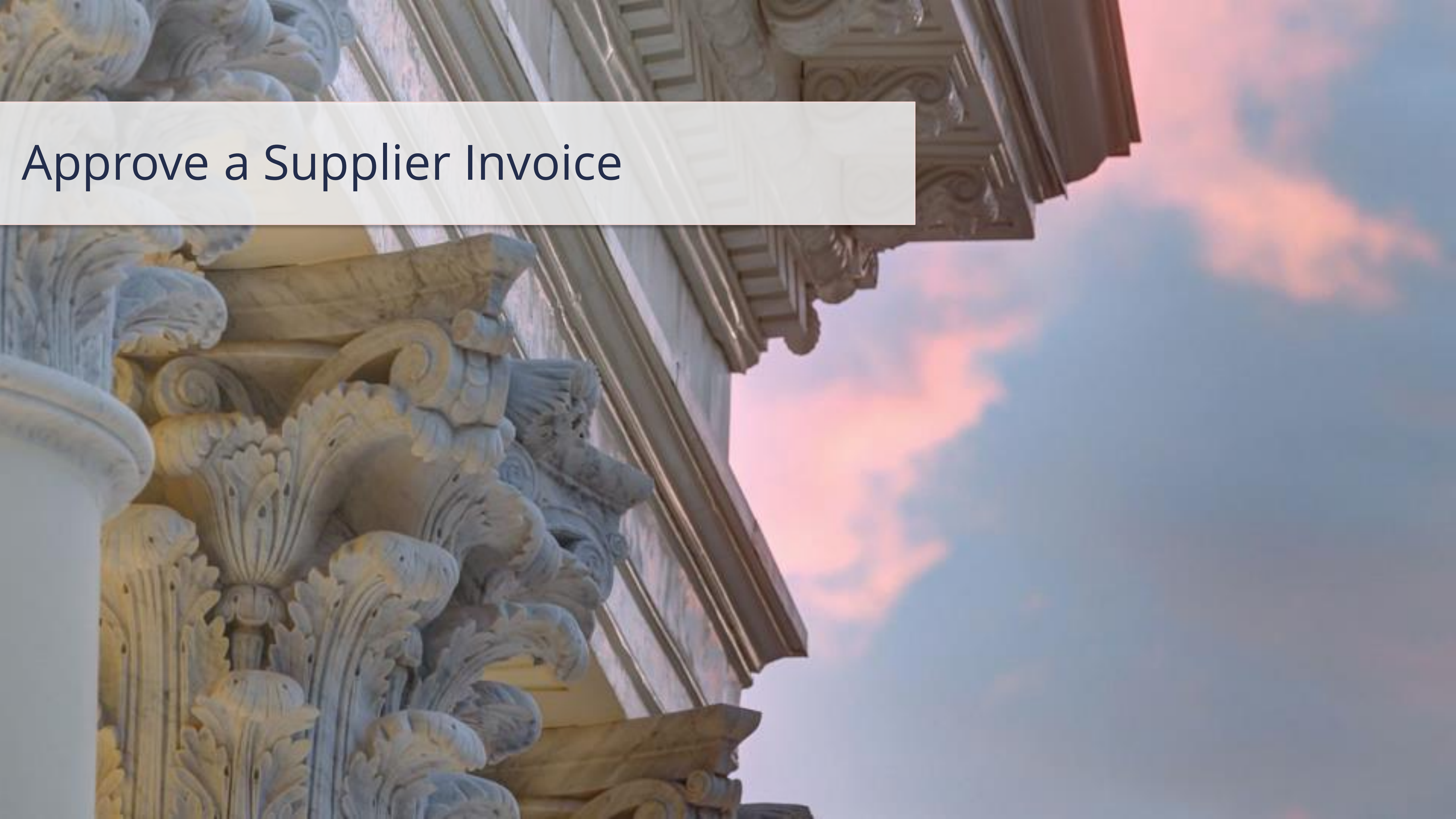
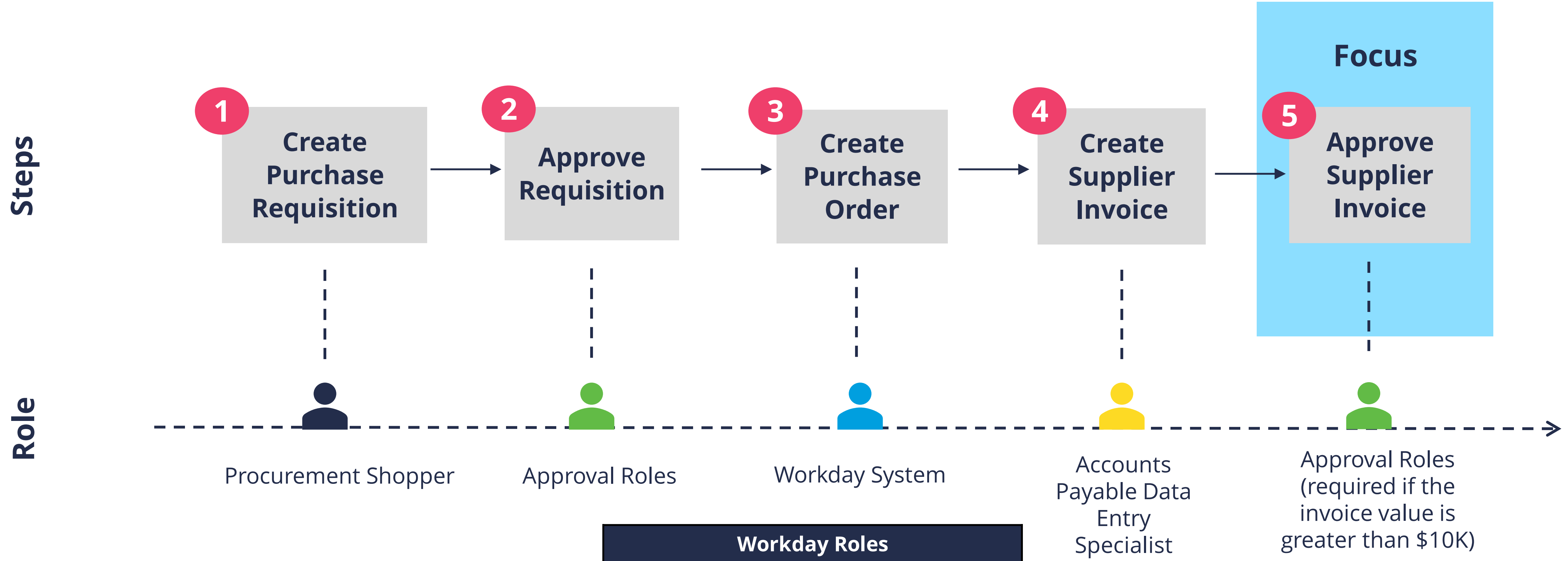
# Knowledge Check | Create and Assign a Cart

# Approve a Supplier Invoice



# Supplier Invoice Overview | High-Level Process Overview

The following represents a **high-level look** into what happens once a purchase requisition is created:




| Workday Roles |
| --- |
| Employee as Self |
| Procurement Shopper |
| Approval Roles |
| Workday System |
| Accounts Payable Data Entry Specialist |

# Supplier Invoice Overview | Employee as Self Role

The following outlines the steps an employee will take to **approve a Supplier Invoice,** the final step in the requisition process. If the invoice value is **greater than $10K** the Requester of the purchase requisition will receive the supplier invoice for approval.

**Steps**

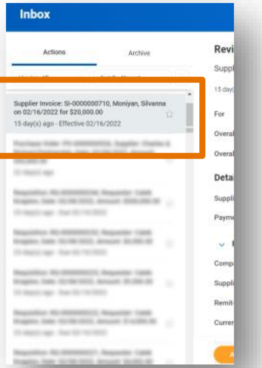
1. **Workday** – **Access the Relevant Supplier Invoice Task from your Inbox** → 
2. **Workday** – **Review the Details** → 
3. **Workday** – **Approve the Supplier Invoice**

**Role**

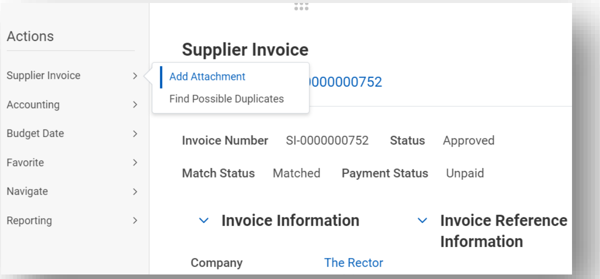
| Step 1 | Step 2 | Step 3 |
|---|---|---|
| Employee as Self | Employee as Self | Employee as Self |

# Approve Supplier Invoice Overview | What are the Key Steps?

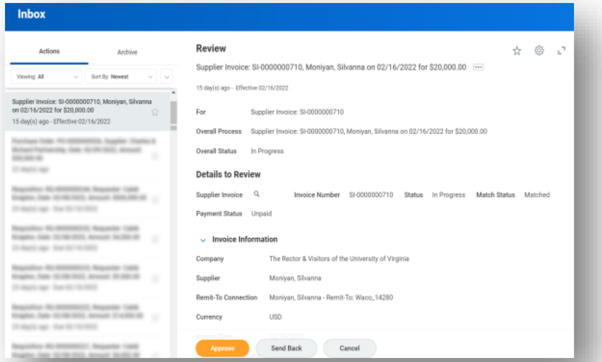
## Access Supplier Invoice Task




## Review and Add Attachments




## Approve the Invoice




OVERVIEW

**Employee** will select the relevant Supplier Invoice task under the **Actions tab**.

**Employee** will review the details of the supplier invoice on the screen and add attachments/packing slips if they wish.

**Employee** will return to the inbox to approve the invoice.

**ACCESS**

**REVIEW**

**APPROVE**

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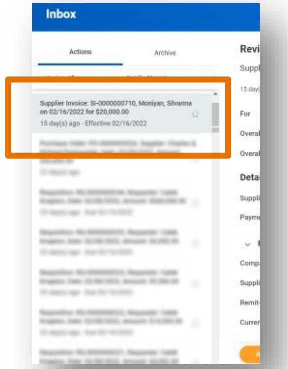
# Approve Supplier Invoice Overview | Access Supplier Invoice Task

## Access Supplier Invoice Task




OVERVIEW

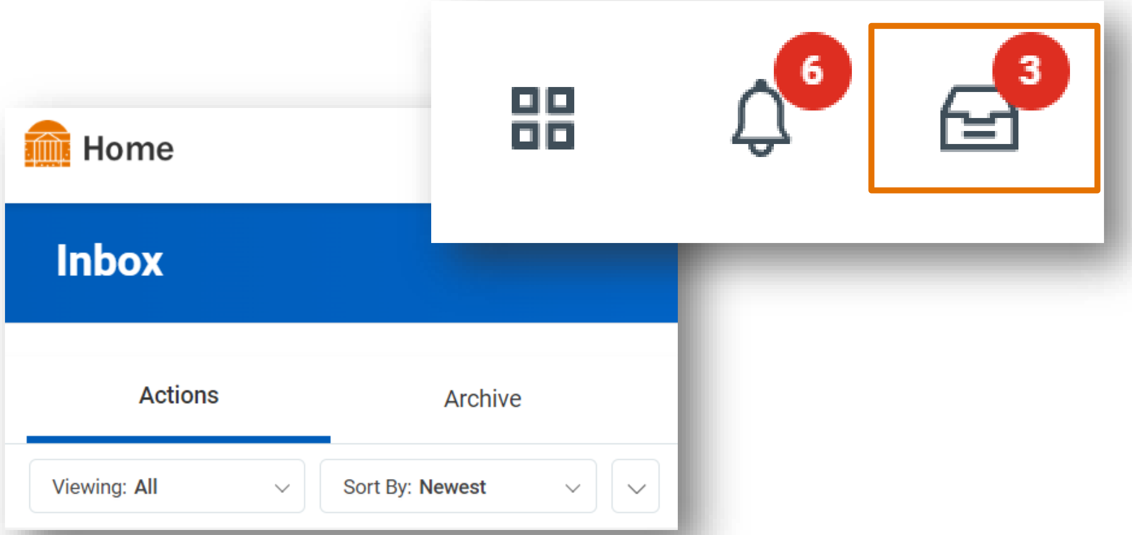
**Employee** will select the relevant Supplier Invoice task under the **Actions tab**.

**ACCESS**

The **Supplier Invoice task** can be accessed from your Workday inbox. From the Inbox screen, employees can select the relevant Supplier Invoice task under the Actions tab.

- A Supplier Invoice task begins with **Supplier Invoice:** and is followed by the invoice number

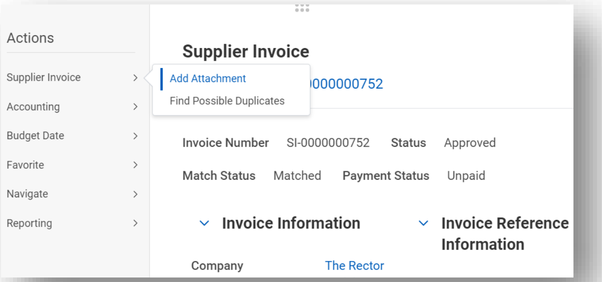
Note: You will receive an Outlook email informing you of the needed Workday action




Supplier Invoices that require your approval will be sent directly to your Workday inbox, which can be accessed in the upper right corner of the Workday Home screen.

# Approve Supplier Invoice Overview | Review & Add Attachments

## Review and Add Attachments



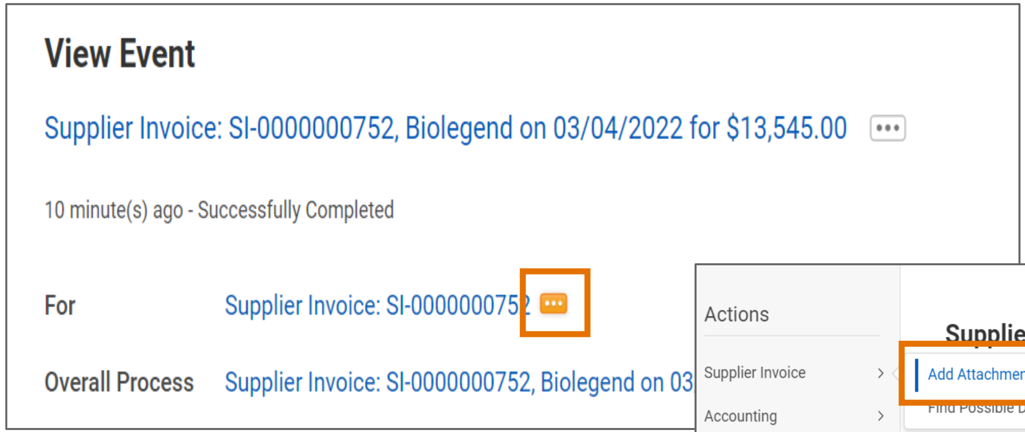

OVERVIEW

**Employee** will review the details of the supplier invoice on the screen and add attachments/packing slips if they wish.

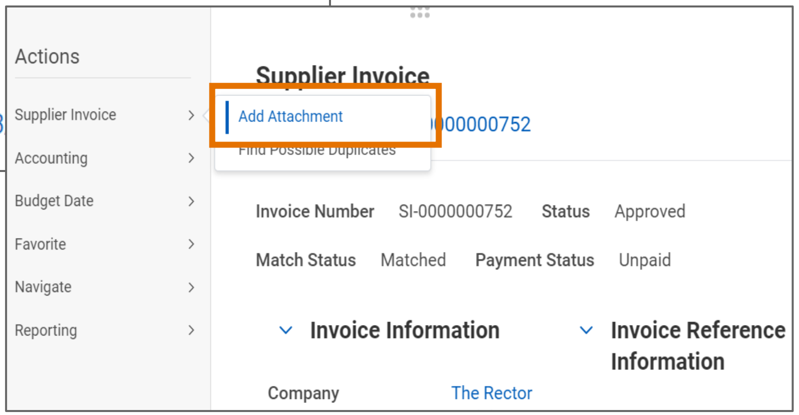
**REVIEW**

In the Review section of the Supplier Invoice task, employees can view the details of the supplier invoice on the screen.

- Employees can add attachments/packing slips by selecting the **Task Actions** icon at the top right and then selecting **View Details**.



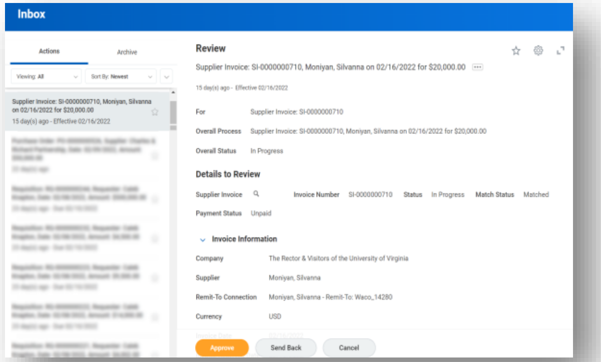

Select **(...) related actions** on the invoice.




Select **Supplier Invoice** and then **Add Attachment.**

# Approve Supplier Invoice Overview | Approve the Invoice

## Approve the Invoice



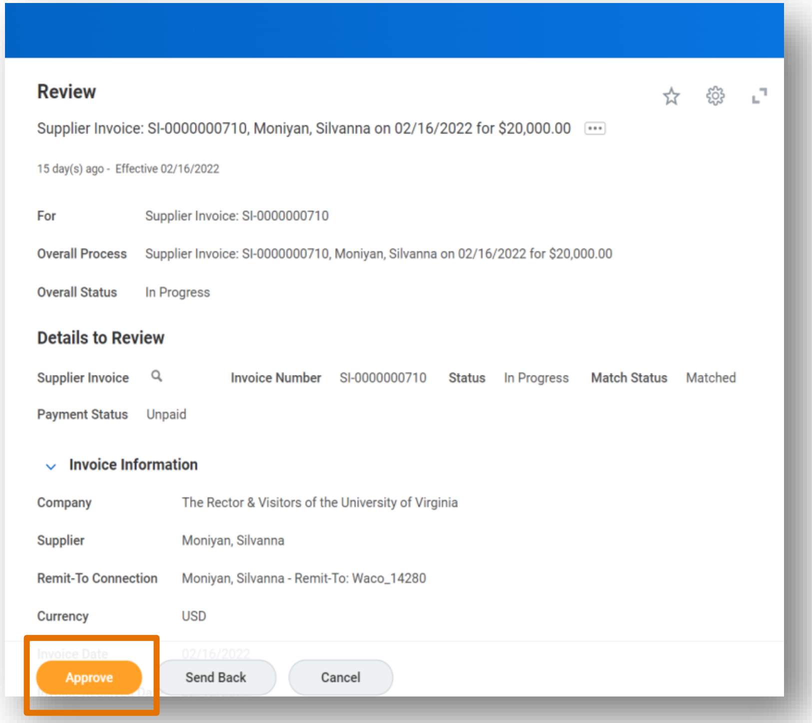

OVERVIEW

**Employee** will return to the inbox to approve the invoice.

APPROVE

Once the employee has reviewed the details of the Supplier Invoice and has added relevant attachments, they will return to the inbox to approve the invoice.

Approving the invoice is your **acknowledgment** that you have **received the goods/services in the quantity shown on the invoice**.




Select the **Approve** button to approve the request.

# Demonstration | Supplier Invoice Approval

- In this demonstration, you will see how to approve a supplier invoice

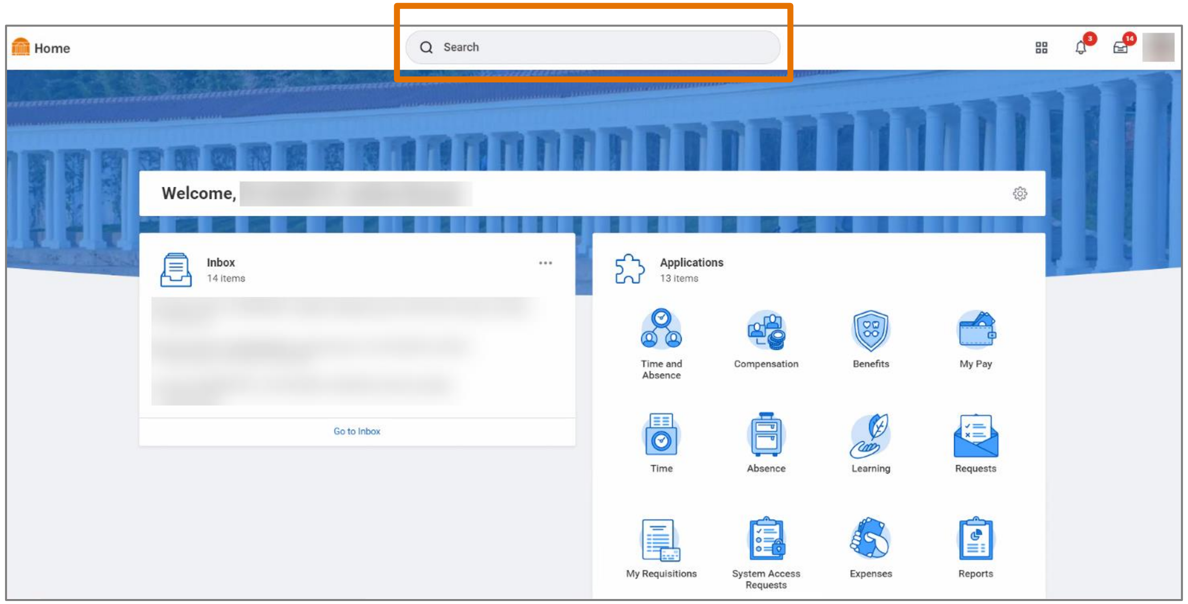
# Knowledge Check | Supplier Invoice Approval

# Run My Requisitions Report

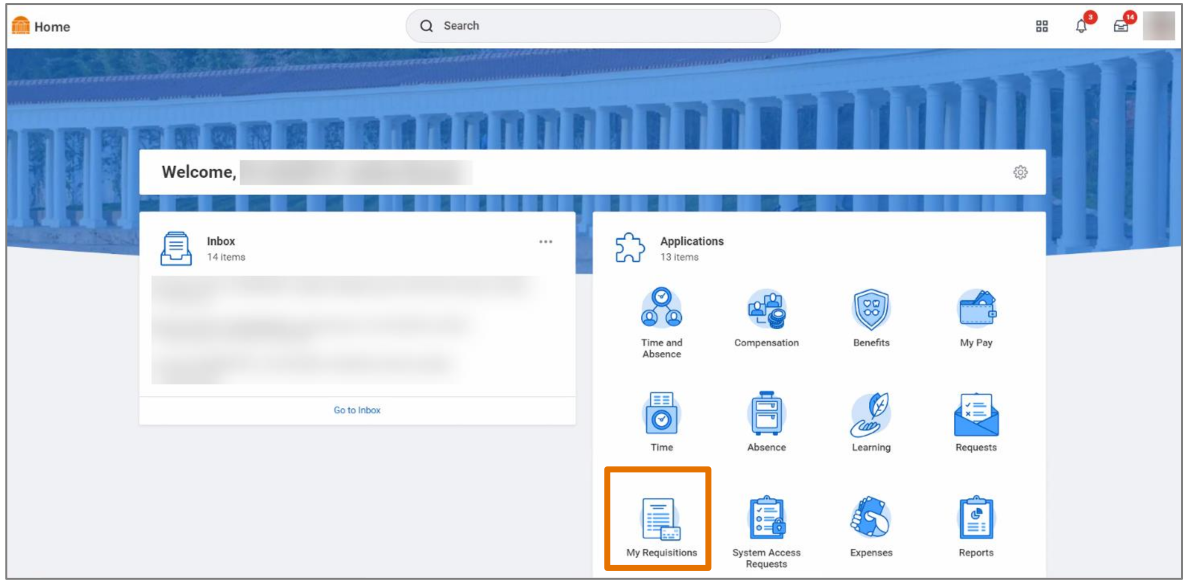
# Reports Overview | Running Reports in Workday

**Reports** in Workday are used to retrieve and analyze information that you may require for various purposes such as decision making, leadership reporting, etc.

There are primarily two ways in which you can find and run reports in Workday:




1. Using the **Workday Search Bar**




2. Using the **My Requisitions** Workday Application

*Note: Reference the **Reports QRG** for more details on how to navigate Workday's Reports functionality.*

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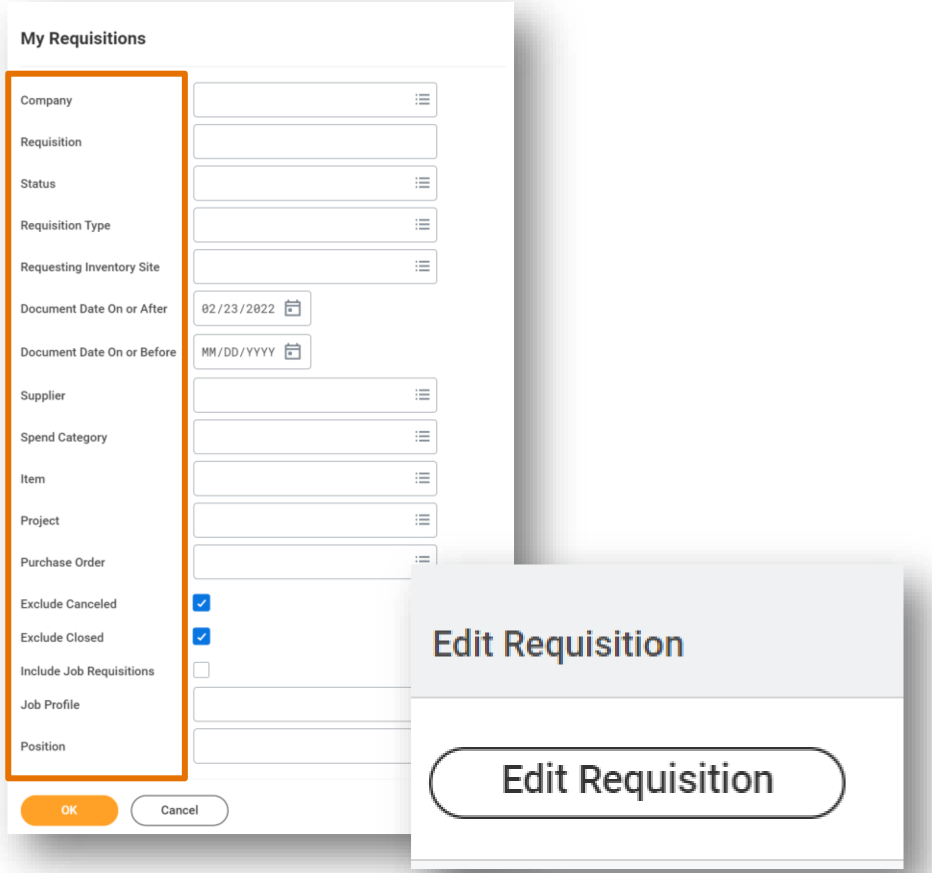
# My Requisition Report

Employees can use the **My Requisitions report** to **view, edit, or cancel a requisition** for which they are listed as the Requester. This report allows employees to track the progress of their requisitions and act on individual requisitions when necessary.

- You can access the **My Requisition** report from the **Workday Search Bar** or via the **My Requisitions Application** and fill in the details to narrow down your search to the required requisition.
- Once you find the required requisition, you can select it to open it and view its details.
- The report shows such information as the **requisition number, date, amount, supplier, purchase order number (if already processed),** and **status**.
- From the report, individual requisitions can be **viewed**. Requisitions can also be **edited** or **canceled** if they have not yet been converted into a purchase order.



# My Requisitions Report Application | Key Considerations

**Report Prompts –** When you access the My Requisitions report in Workday, you will be navigated to a screen with multiple prompts. These **prompts are fields that allow you to select the filter criteria to be used when running your report**. The filter criteria that you select is used by Workday **to narrow down your search** and display specific information of your choice in the report. Utilize these prompts to customize your report to match your specific need.

**Save Report Prompt Filter Criteria –** If you use the same filter criteria to run the My Requisitions report frequently, instead of manually selecting your filter criteria each time you run this report, Workday allows you to **save your prompt values to reduce the effort of selecting filter criteria each time you run the report**.

# Demonstration | My Requisition Report

- In this demonstration, you will see how to access your My Requisition report

# Course Wrap-Up | Course Evaluation

Your feedback is important to us!

Please take a moment to evaluate this course using the following link:

# Thank you!