



Requisition – Employee as Self

April 2022



Introduction | Course Agenda

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



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





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?





items they need.

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.



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.



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

Connect to the UVA Marketplace

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Û	Connect to Supplier Website Task	

Create Cart

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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.

Assign Cart

Assign Cart To:	<i>no value</i> SELECT ▼ or SEARCH	
Note To Assignee:		11

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	CDEATE	ASSIGN
CONNECT		ASSIGN



Create and Assign a Cart Overview | Connect to UVA Marketplace

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	et to the UVA Marketplace, search <i>Connect</i> <i>r Website</i> in the Workday taskbar.	Requester * Company * Currency * Requisition Type III Deliver-To III Ship-To *		
OVERVIEW	Employee will connect to the <mark>UVA</mark> Marketplace from Workday.	ок Cancel 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 .	Connect to Supplier Website Provide College at Wase Requester Annands Grace Hughes Currency USD Requisition Type 1 Standard Supplier Websites 1 annands Currency USD Requisition Type Supplier Websites 1 annands Currency USD Requisition Type Usplier Websites 1 annands USD Loge Usplier Websites 1 annands USD Loge Usplier UVA Marketplace UVA Marketplace UVA Marketplace I Continue Shopping Image: Shopping Image: Shopping	문 된 Turn on Bie new tables view (신 두 급 Connect
	CONNECT		Selecting Connect will navigate you from Work Marketplace, where you can add items to your and assign your cart to a Procurement Shoppe	shopping ca



Create and Assign a Cart Overview | Create Cart



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.

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



Create and Assign a Cart Overview | Assign Cart

Assign Cart

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- **DVERVIEW**
- **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.

8 No Assignee Sele	ected	
Assign Cart To:	no value SELECT ▼ or SEARCH	
Note To Assignee:		

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.



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:

Steps

Role



18

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.





Approve Supplier Invoice Overview | What are the Key Steps?

Review and Add

Attachments

Access Supplier Invoice Task

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

Actions Supplier Invoice Supplier Invoic Add Attachment 000000752 Find Possible Duplicates Accounting Budget Date Invoice Number SI-000000752 Status Approved Favorite Match Status Matched Payment Status Unnaic Navigate Reporting Invoice Information Invoice Reference Information Company The Rector

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

Approve the Invoice

Inbox			
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Includes in contrast, includes 1		Approve Send Back Cancel	

Employee will return to the inbox to approve the invoice.





Approve Supplier Invoice Overview | Access Supplier Invoice Task

Access Supplier

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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

Mome	88	¢6	
Inbox		_	_
Actions	Archive		
Viewing: All viewing: All	By: Newest		

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

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Review and Add Attachments



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**.

View Event			
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elect () related actions on the invoice.	Budget Date	> Invoice I	Number SI-0000000752 Status Approved
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Select Supplier Invoice and then Add Attachment.



Approve Supplier Invoice Overview | Approve the Invoice

Approve the Invoice

Inbox	
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	Invoice Date 02/16/2022
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Employee will return to the inbox to approve the invoice.

APPROVE



OVERVIEW

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**.

Review	📩 🎲 🗋			
Supplier Invoice	2: SI-0000000710, Moniyan, Silvanna on 02/16/2022 for \$20,000.00			
15 day(s) ago - Effe	tive 02/16/2022			
For	Supplier Invoice: SI-0000000710			
Overall Process	Supplier Invoice: SI-0000000710, Moniyan, Silvanna on 02/16/2022 for \$20,000.00			
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Supplier Invoice	Q Invoice Number SI-0000000710 Status In Progress Match Status Matched			
Payment Status	Unpaid			
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Company	The Rector & Visitors of the University of Virginia			
Supplier	Moniyan, Silvanna			
Remit-To Connection Moniyan, Silvanna - Remit-To: Waco_14280				
Currency	USD			

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.

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:





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