Create an Ad Hoc Requisition for Next Fiscal Year

An Ad Hoc Goods or Services Requisition is needed for the following fiscal year. This is done by modifying the Request Date in Step 14.

From the Home Screen:

1. Type Create Requisition in the search box.
2. Check Company Name and Requester; modify as needed.
3. Select what Requisition Type from drop down area.
4. Click OK at bottom of screen.

**NOTE:** The selection of a Request Goods or Request Services is based on how the item is to be Received in Workday.

GOODS are anything that will be received, accepted and tracked in Workday by the QUANTITY. For example: a computer, business cards, or lab supplies are considered goods because they have a defineable Quantity, Unit Cost, and use Units of Measure like Each, Box, or Lot.

SERVICES are anything that will be received, accepted and tracked in Workday that is not a goods item and will be received based on the DOLLAR AMOUNT. A Services request does NOT have a quantity, unit cost, or unit of measure and simply expressed as a Dollar Amount.

This will take you to this screen.

5. Select Request Ad Hoc Goods or Services and click Done at bottom of screen.
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The next screen is where you will start your requisition.

6. Check **Request Goods** or **Request Services**

7. Enter **Description**

8. Enter/Search for **Spend Category**

9. Enter **Supplier**

10. For Goods lines, enter **Quantity, Unit Cost** and **Unit of Measure**. For Service Lines enter **Start and End Dates** and **Extended Amount**.

11. Click on **Save and Checkout**

12. The next screen is where you will put in your data and the most important the Request Date or the date in which you need the GOODs or Services.

13. Check **High Priority Flag** if applicable.

14. Check **Ad Hoc Address** if shipping to a different location or to enter an address with building and room number.

15. Select/enter **Request Date**. For FY 17 Requisitions, be sure to use a date of July 1, 2017 or later.

16. Leave **Sourcing Buyer** blank

17. Enter “FY 17” in **Memo** Field if for a 2017 request

18. Check/Change **Spend Category** and **SmartTag(s)** as necessary

19. Use **Project Worktag** or **Grant Worktag** as necessary. If buying equipment over $5,000 on a grant, the **Expense Treatment Over $5,000 Worktag** must be added to **Additional Worktag**.

20. Click on **Attachments**. Upload related documents such as supplier quotes as necessary.

21. Click **Submit** to complete and send for approval.
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NOTES:
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