Beginning with WD 26, when creating a requisition (Catalog, Punchout, Ad Hoc, or Payment Request) a new feature has been added which will allow the user to enter in a default Worktag for the requisition, or create a template in advance that can be applied during the requisition process.

1. When creating a requisition, on the line item entry screen a new option will appear on the bottom line menu: *Edit Default Worktags*
2. Clicking on **Edit Default Worktags** opens a new page broken into 3 sections or options. Only one of these 3 options can be used with each requisition, but it can be changed at anytime during the create requisition process in favor of another option:

**Copy from Worktags Template**

![Edit Worktag Defaults](image)

**Default Worktags**

**Default Splits**

![Default Splits](image)

Your screens and processes may vary from those described here.
3. **Default Worktags**
   a. Check the box marked *Use Default Worktags*.
   
b. This will create and populate a single SmartTag string with the user’s SmartTag.
   
c. Change the SmartTag to the desired SmartTag, Project or Grant. Add any required additional Worktags like Expense Treatments for Equipment, or Travel.
   
d. Click *OK* to continue.
   
e. All existing line items on the requisition will change to the default SmartTag. *Additionally, any NEW line items created after the Default Worktag feature is used will contain the Default Worktags.*
4. **Default Splits**
   a. Check the box marked *Use Default Splits*.

   b. This will create a single empty funding line. Enter the first percentage split line and WD will populate the rest with the User’s SmartTag.

   c. Enter the new default the SmartTag, Project or Grant for the first split. Don’t forget to add and additional worktags like Expense Treatments.

   d. Default Splits only work based on percentages (%) and not by dollars ($) or quantity. To split a requisition based on exact dollar amounts or quantities the Default Worktag feature cannot be used; the split must be entered per normal requisition procedures at the individual line item level.

   e. Click on the “+” sign to add a new line for the split. Enter the percentage split for the new funding line and the new SmartTags.
**Procurement: Default Worktags and Worktag Templates for Requisitions**

f. Continue “+” adding lines until the percentage of the split lines adds to 100%, and the *Remaining Percentage to Split* indicator under the *Use Default Splits* check box reads “0”.

![Default Splits](image)

- Use Default Splits: [ ]
- Remaining Percentage to Split: 10%


g. Click **OK** to continue.

h. All existing line items on the requisition will change to the default split.

**BUT, any NEW line items created after the Default Split feature is used will NOT contain the Default Split.** This is because the Workday calculation to split line cost between the funds is a process that can only be executed at the time the *Default Split* feature is used on the requisition.

**However,** if a new line item is created after using the *Default Split* feature simply leave it with the regular SmartTag and click on *Edit Default Worktags*, check *Use Default Splits* again, and click **OK**. The Default Split will **reapply** itself to all the requisition line items.
5. **Creating Worktag Templates**
   a. In order to use a Worktag Template on a requisition, the template must be created prior to creating the requisition.
   
   b. Worktag Templates are created using the **Create Requisition Worktags Template** in Workday by typing in the Search Box.
   
   c. The **Create Requisition Worktags Template** screen is almost identical to the **Edit Default Worktags** screen accessed from the requisition, but with two noticeable additions: **Template Name**, and an **Inactive** check box.

![Create Requisition Worktags Template](image)
d. All template must have a name to save by and for use later when accessing it in a requisition.

Remember: Templates are your own user creations not used or seen by others, so use a naming convention that is best suited for you to use when entering in requisitions.

Use the *Inactive* check box if you want to deactivate the template from further use and appearing as an option in *Edit Default Worktags* when creating a requisition.

e. Enter the Default Worktag or Default Split into the template exactly as specified in 3. and 4. above.

f. Click **OK** to continue. Workday will confirm the Template. Click **Done** to continue.
6. **Using Worktag Templates**
   
a. To use a Worktag Template in a requisition, click on *Edit Default Worktags* when creating the requisition line items.

   b. Click on the prompt (waffle) icon next to the *Copy from Worktags Template* line. This will bring up a search box, and the option to select a default from your *Worktag Templates*, or *Worktag Split Allocations*.

   c. In this example there are two Split Allocations templates to select from:
d. Select the desired template by checking the appropriate “bubble”. Workday will pull in the template into the **Edit Default Worktags** screen and automatically update the **Default Worktags** or **Default Splits** line based on the template selected.

![Default Splits](image)

- Click **OK** to continue and apply the template and default worktags to the requisition.
7. Managing Worktag Templates

a. To find your Worktags, from the Workday Search Box type **Requisition Worktag Templates**. This report will display all your Worktags.

b. To **View** any template, click on the template name.

c. To **Edit** the template, click on the related actions (twinkie) and select **Requisition Worktags Template, Edit**.
d. To deactivate a template, click on the Inactive check box at the top of the page when Editing the template.

e. Templates cannot be deleted once created in Workday; they can only be made inactivate.