

Creating a FY25 Requisition for Goods or Services

1. In Workday, type in 'Create Requisition' in the search bar. Select the **Create Requisition task**.
2. Update or fill in information where needed from the pop-up. Please pay attention to the following:
 - a. **Requester:** The requester will default to the person inputting the requisition. To change to someone else, click on the **X** to remove the defaulted name and enter the person who will be the requester.
 - b. **Requisition Type:** Choose the requisition type of **Goods or Services** by clicking on the 3-line prompt.
 - **Note:** Click on the **?** icon next to this field will populate help text to guide you in choosing the correct type (If help text is selected to be on from the top of the page).
 - c. **Additional Worktags:** Replace the Additional Worktags with the worktag you want to charge this procurement to. By entering the information in this field, it will pre-populate the lines created in your requisition. You can change them by line if necessary further on in the process.
 - **Note:** If the worktag you are using does not fall under your default Unit and Cost Center, you will need to first remove them.
 - d. Click **OK**

Create Requisition

Requester *	<input type="text" value="X Desi Tillman ..."/>	a
Company *	<input type="text" value="X University of Nevada, Reno ..."/>	
Currency *	<input type="text" value="X USD"/>	
Requisition Type *	<input type="text"/>	b
Deliver-To *	<input type="text" value="X UNR - Main Campus > Bcn Purchasing"/>	
Ship-To *	<input type="text" value="X 1664 North Virginia Street Reno, NV 89557 United States of America"/>	
Unit	<input type="text" value="X UNR08 VP Administration and Finance"/>	
Cost Center	<input type="text" value="X CC2251 BCN Purchasing ..."/>	
Additional Worktags	<input type="text" value="X Fund: FD892 Payroll Clearing"/>	c

d

3. On the next page, you will select **Request Non-Catalog Items**.

Create Requisition

Instructions

Policy for Commodity and Service Purchases:

Written quotes are required for all Purchase Requests.

The competitive threshold requirements below for general commodities and services apply to single or conglomerate purchases within a 12-month period:

Under \$25,000 – Attach one written quote

25,000 to under \$50,000 – Attach minimum of two written quotes

\$50,000 and above – will be competitively bid by the Purchasing Department unless a Competitive Exception or Sole Source Justification form is attached.

For competitive threshold requirements on professional and construction services, please contact your Purchasing Business Center.

Hosting Expenses:

Please ensure that a hosting detail code is associated with any line that is hosting related.

In addition, an approved hosting form must be attached if hosting related.

Link to the Purchasing Manuals for the Business Centers North (BCN)

<http://www.bcnpurchasing.nevada.edu/about-us/bcn-purchasing-guidelines/>

Select an Option

Request Non-Catalog Items

Request Goods or Services that is not in the Punchout/Supplier Websites

Add from Templates and Requisitions

Select from Requisition templates and past Requisitions

Select from My Procurement Favorites

Select from my Favorite items

4. Request Non-Catalog Items:

- a. The **Non-Catalog Request Type** will default to 'Request Goods'. Be sure to switch to 'Request Service' if you are procuring services.
- b. Complete all remaining items. Example screenshot below is for Goods.

Company * University of Nevada, Reno

Requisition Currency *

Non-Catalog Request Type

- Request Goods
- Request Service

Goods Request Details

Item Description *	<input type="text" value="Lobby guest chairs, <u>HON134c</u>, Sled Base, Gray"/>
Supplier Item Identifier	<input type="text"/>
Spend Category *	<input type="text" value="SC0158 - Office Furniture"/>
Supplier	<input type="text" value="Morrill and Machabee, Inc."/>
Supplier Contract	<input type="text"/>
Quantity *	<input type="text" value="12"/>
Unit Cost	<input type="text" value="79.00"/>
Unit of Measure *	<input type="text" value="Each"/>
Extended Amount	948.00
Memo	<input type="text" value="6 ea for room 102, 6 ea for room 109"/>

Add to Cart

Continue Shopping ▼

Cancel

- c. Example screenshot below is for Services. In the **memo field** indicate this is for FY25.
 - o **Note:** For FY25 requisitions, you will need to ensure that the dates the service will be occurring are in the next fiscal year (July 1, 2024 or later).

Request Non-Catalog Items

Company: University of Nevada, Reno | Requester: Desi Tillman | Requisition Type: Goods or Services

Requisition Currency: USD

Non-Catalog Request Type

Request Goods
 Request Service

Service Request Details

Description: Laboratory testing services per attached scope of work dated April 1, 20XX.

Spend Category: Recommended SC0668 - Computer Software - Subscription/Annual | SC0502 - Lab Testing and Analysis Services (Non Medical)

Supplier: Scientific Services Plus

Supplier Contract:

Start Date: 07/01/2024

End Date: 09/30/2024

Extended Amount: 8,000.00

Memo: FYXX Requisition

Continue Shopping | Add to Cart | Cancel

5. Once you have completed entering the appropriate information, click **Add to Cart**. You will receive a confirmation your item has been added.



6. At this point Workday will automatically populate a second item. You can continue entering lines if necessary and adding them to your cart as described above, or you can now check out by clicking on the cart icon.



7. Then you will view a summary of your cart. Click the **Checkout** button to proceed.
8. **Checkout:** Continue through the checkout process:
 - a. On the checkout page, you can make changes to the requisition type if needed. You can click on the question marks next to each field see help text for completing each field (If help text is selected to be on from the top of the page).

IMPORTANT NOTE:

You must change the Request date to 7/1/2024 or later and include in the Internal Memo field "FY25 Requisition".

Shipping Address

Deliver-To UNR - Main Campus > Bcn Purchasing

Ship-To Address 1664 North Virginia Street
Reno, NV 89557
United States of America

Requisition Information

Request Date * 07/01/2024

Currency * x USD

Credit Card

Requisition Type x Goods or Services

High Priority

Sourcing Buyer

Submitted by Desi Tillman

Freight Amount 0.00

Other Charges 0.00

Memo to Suppliers

Internal Memo FYXX Requisition

- Submit
- Save for Later
- Continue Shopping
- ...

- b. Expand the Attachments arrow to add necessary attachments. Upload attachments individually so the buyer can determine which attachments go forth to the supplier along with the PO.

Attachments

9. Click **Submit** once complete. Upon submission, the requisition will either be in submitted status, or in the case of a budget fail will go back to your inbox for further review.
10. Once your requisition is approved, the buyer will source the requisition and it will be held for issuance after July 1, 2024.