

ERP Job Aid

RI Enterprise Resource Planning



Create a Requisition Template

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Requisition Templates:

Requisition Templates are established through the **Create Requisition Template** task and are designated to streamline the requisition creation process.

Template Components:

Fields marked with an asterisk (*) are required. Templates may include the following elements:

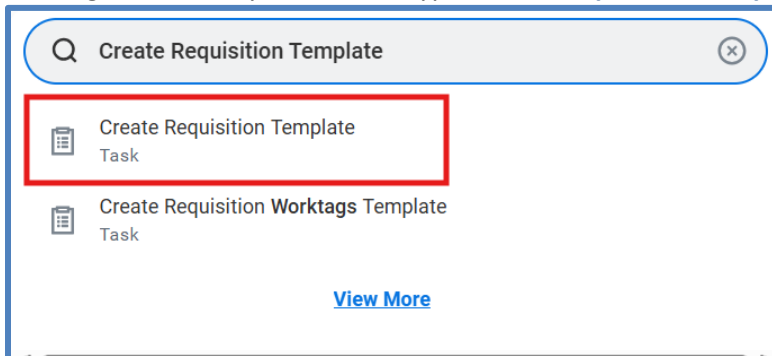
- Company*: One or more companies must be specified.
- Requisition Type
- Description
- Spend Category
- Supplier
- Order-From Connection
- Worktags*: Required and may be split across multiple worktags

Requisition templates do not include the following:

- Commodity Code
- Supplier Contract

Create Requisition Template:

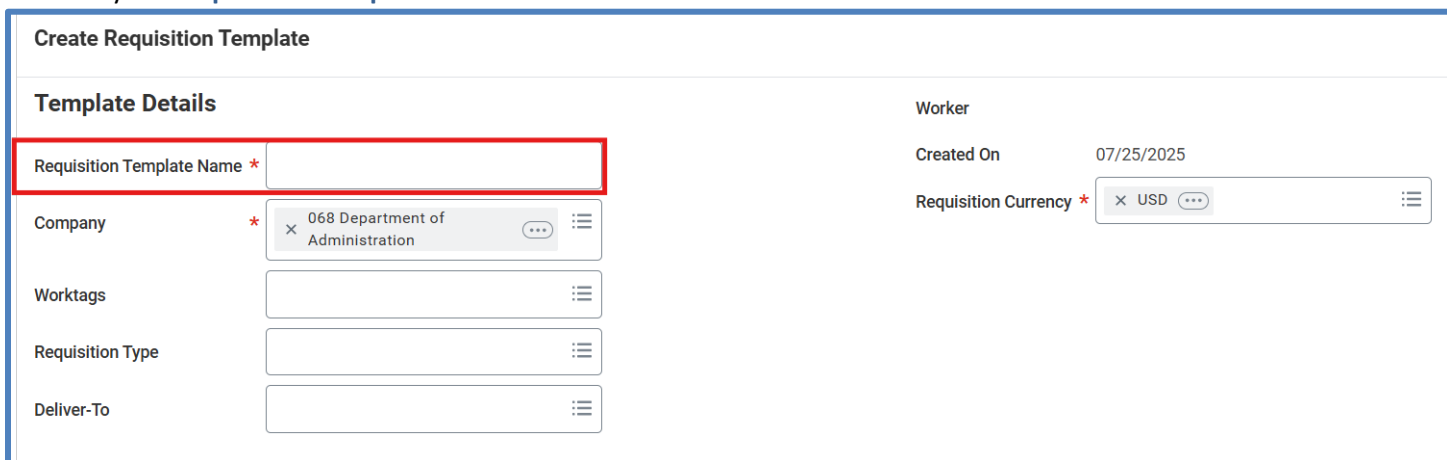
1. Using the Workday Search Bar, type **Create Requisition Template** and select the task.



A screenshot of the Workday search bar. The search bar contains the text "Create Requisition Template". Below the search bar, two results are displayed: "Create Requisition Template Task" and "Create Requisition Worktags Template Task". The first result is highlighted with a red rectangular box. A "View More" link is visible at the bottom of the search results.

(**Note:** Alternatively, use the task **Create Shared Requisition Template** to create a template that can be shared with other Requisitioners within the same agency.)

2. Enter your **Requisition Template Name**.



A screenshot of the "Create Requisition Template" form. The form has a title "Create Requisition Template" and a section "Template Details". The "Requisition Template Name" field is highlighted with a red rectangular box and is marked with an asterisk (*). Below it, the "Company" field is also marked with an asterisk (*) and contains the text "068 Department of Administration". To the right of the form, there are fields for "Worker", "Created On" (07/25/2025), and "Requisition Currency" (USD). The "Requisition Currency" field is marked with an asterisk (*) and has a dropdown menu showing "USD".

(**Note:** Optionally, enter a Requisition Type.)

(**Note:** If creating a shared template, Template Access defaults to Not Shared. To share with other team members, select their name in the User list.)

3. Enter the details for your **Goods** or **Services** line items by completing the required fields. Specify an extended

amount (e.g., \$1.00) and provide the appropriate Worktags for each split. Select **OK** when done.

(**Note:** An extended amount is required to save the created split lines. This value can be adjusted later during the requisition creation process.)

4. Select the **Menu** tab in the top left corner.

5. Under the heading **Organization**, select **Requisitions**.

6. Under the heading **Requisition Details**, select **Edit Details**.

7. When creating a requisition from a template, the following fields must be removed within the Edit Details menu:

- a. Fund
- b. Source of Funds
- c. Additional Worktags

8. Select **Save Changes**.

The screenshot shows a form titled 'Edit Details' with several input fields. The 'Fund' field is highlighted with a red box. Below it are 'Appropriation', 'Cost Center', 'Grant', and 'Project Task'. Further down, 'Source of Funds' and 'Additional Worktags' are also highlighted with a red box. At the bottom, there are three buttons: 'Save Changes' (highlighted with a red box), 'Cancel', and 'Reset to Default'.

9. Under the heading **Ordering Methods**, select **Add from Templates and Requisitions**.

The screenshot shows a menu titled 'Ordering Methods' with five options. The 'Add from Templates and Requisitions' option is highlighted with a red box. The other options are 'Search Catalog', 'Request Non-Catalog Items', 'Connect to Supplier Website', and 'Select from My Procurement Favorites'.

10. Select the appropriate requisition template by selecting the box under the **Requisition Template** heading.
11. Select **Add to Cart**.

Requisition Templates 1 item	
Select	Name
☒	Test Template

12. Adjust the **Extended Amount** as applicable.
13. Select **Checkout**.
14. Update additional fields as necessary, including:
- a. Requisition Type
 - b. Commodity Code
 - c. Supplier
 - d. Other relevant fields
15. Upload any required attachments by selecting **Select Files**.
16. Select **Submit** to finalize the requisition.

Requisition Worktags Template – For Allocations:

Requisition Worktags Templates:

Requisition Worktags Templates are established through the [Create Requisition Worktags Template](#) task and are designated to streamline the requisition creation process containing split funding.

Template Components:

Fields marked with an asterisk (*) are required. Templates may include the following elements:

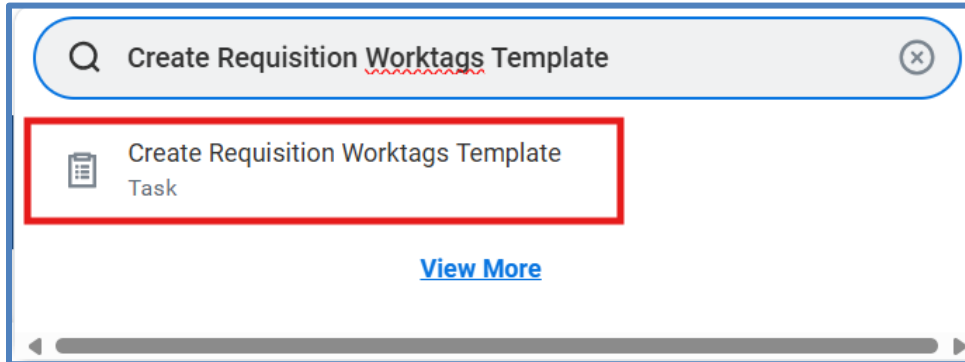
- Company*: One or more companies must be specified.
- Requisition Type
- Description
- Spend Category
- Supplier
- Order-From Connection
- Worktags*: Required and may be split across multiple worktags

Requisition Worktags templates do not include the following:

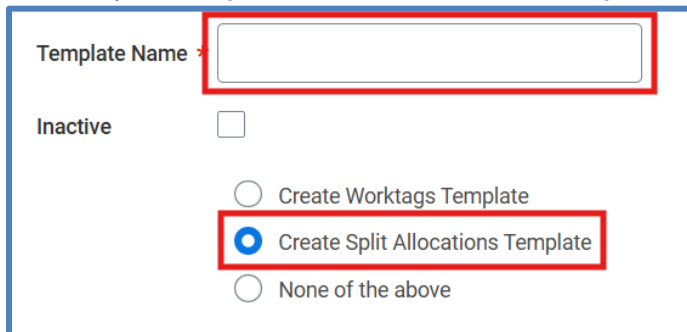
- Commodity Code
- Supplier Contract

Create Requisition Worktags Template – For Allocations:

1. Using the Workday Search Bar, type [Create Requisition Worktags Template](#) and select the task.

A screenshot of the Workday search bar. The search bar contains the text "Create Requisition Worktags Template". Below the search bar, a red box highlights the search result "Create Requisition Worktags Template" with a document icon and the word "Task" underneath. Below the red box is a blue link that says "View More".

2. Enter your [Template Name](#) and select [Create Split Allocations Template](#).

A screenshot of the "Create Requisition Worktags Template" form. The form has a "Template Name" field with a red box around it. Below the field is an "Inactive" checkbox. Below the checkbox are three radio button options: "Create Worktags Template", "Create Split Allocations Template" (which is selected and has a red box around it), and "None of the above".

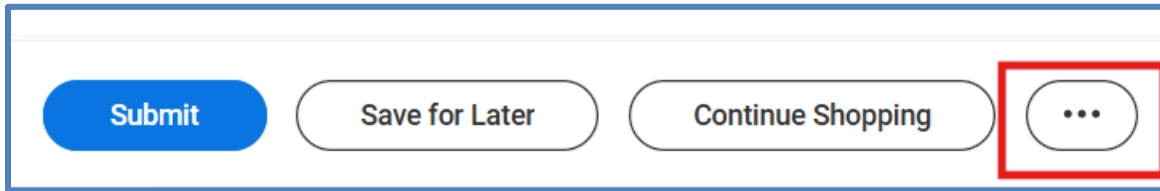
3. The total percentage allocation must equal 100%. An initial line will automatically populate within the template. To add additional lines, select the (+) icon. For each line, ensure you specify the following details:
 - a. Percentage
 - b. Appropriation
 - c. Source of Funds

- d. Any applicable additional Worktags
4. Select **OK** when done.
5. Select the **Menu** tab in the top left corner.
6. Under the heading **Organization**, select **Requisitions**.
7. Under the heading **Requisition Details**, select **Edit Details**.
8. When creating a requisition from a template, the following fields must be removed within the Edit Details menu:
 - a. Fund
 - b. Source of Funds
 - c. Additional Worktags
9. Select **Save Changes**.

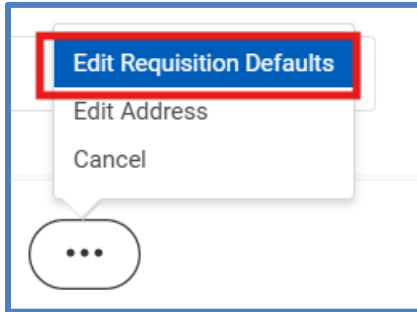
10. Under the heading **Ordering Methods**, select **Request Non-Catalog Items**.

11. Proceed by entering your requisition details.

12. Select **Add to Cart**.
13. Select **Checkout**.
14. Select the related actions (...) at the bottom of the screen.



15. Select **Edit Requisition Defaults**.



16. Select **Copy From Worktags Template**.
17. Select **Split Allocations** then select your template.
18. Select **Apply**.
19. To verify that the template has been successfully applied, navigate to the Goods/Services line. Use the horizontal scroll bar to locate the Splits field.
20. Select the Splits hyperlink to view the split.
21. Select Done.
22. Complete any other required requisition details and select **Submit** to finalize the requisition.