ERP Job Aid
RI Enterprise Resource Planning

Create a Requisition Template

Contents

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:

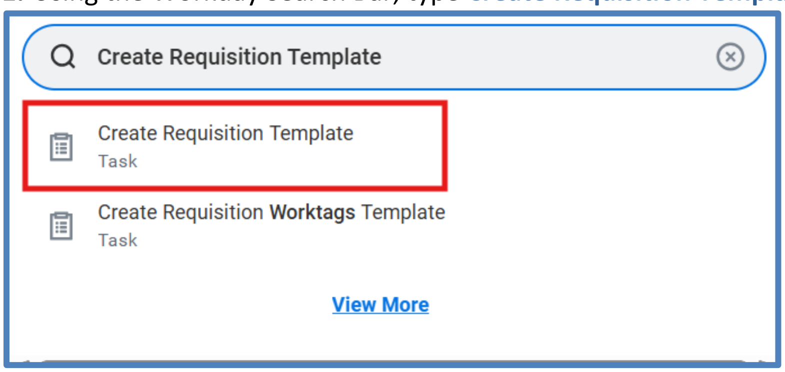
- Company*: One or more companies must be specified.
- Requisition Type
- Description
- Spend Category
- Supplier
- Order-From Connection
- Worktags*: Required and may be split across multiple worktags

Requisition templates do not include the following:

- Commodity Code
- Supplier Contract

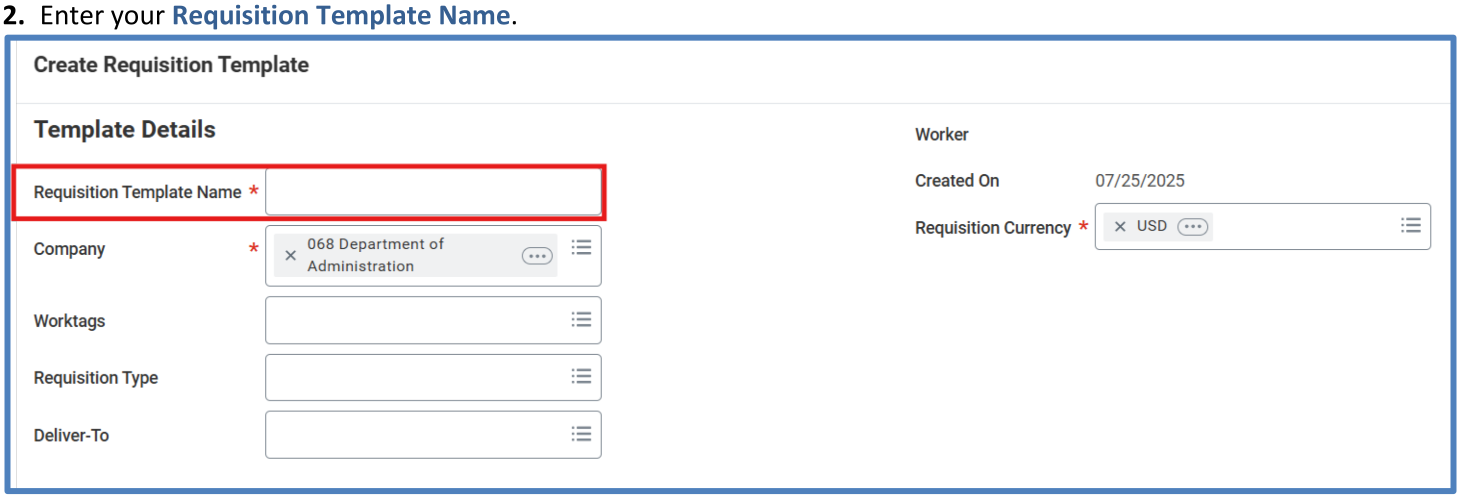
Create Requisition Template:

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



(**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**.



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

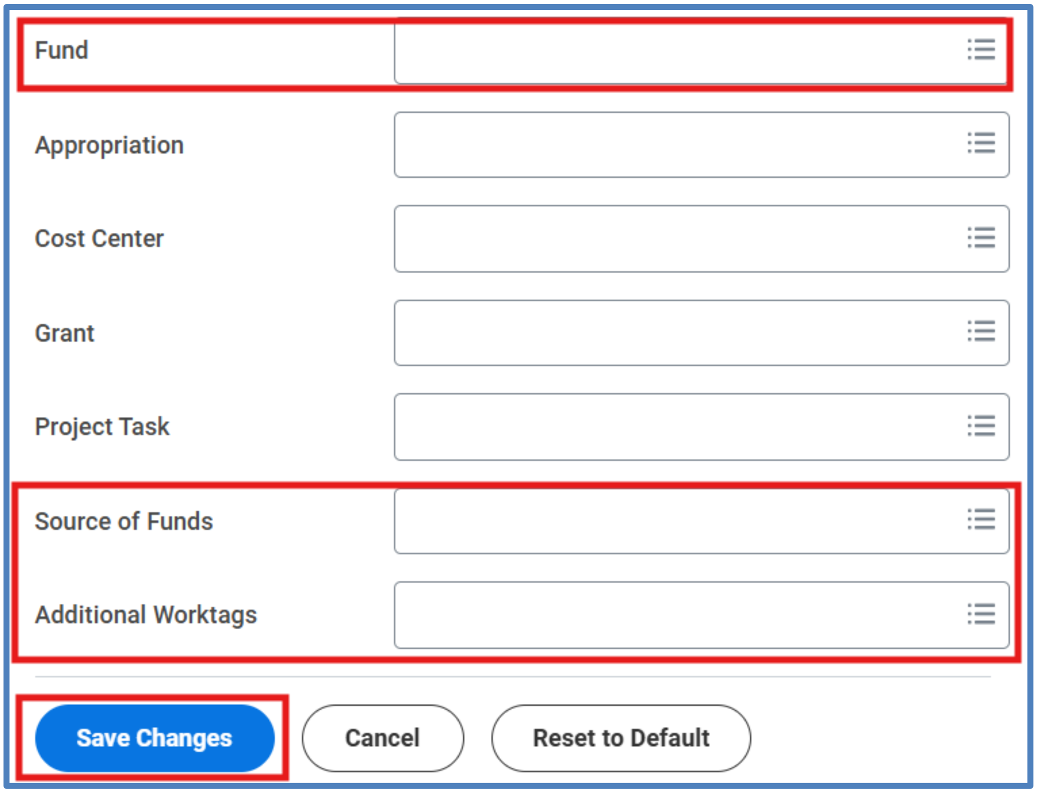
(**Note**: *If creating a shared template, Template Access defaults to Not Shared. To share with other team members, select their name in the User list.)*

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

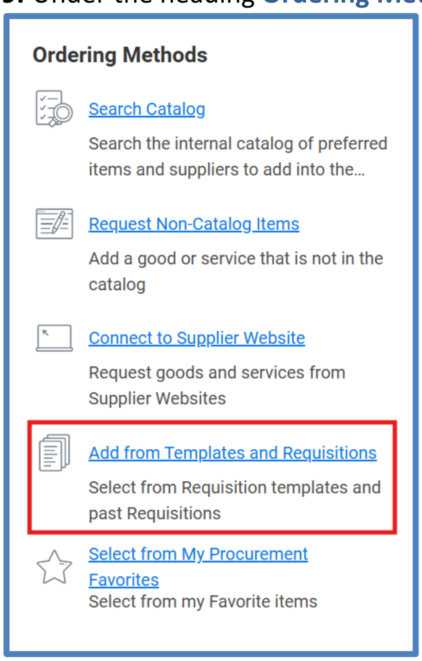
amount (e.g., $1.00) and provide the appropriate Worktags for each split. Select **OK** when done.
(**Note**: *An extended amount is required to save the created split lines. This value can be adjusted later during the requisition creation process.)*

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

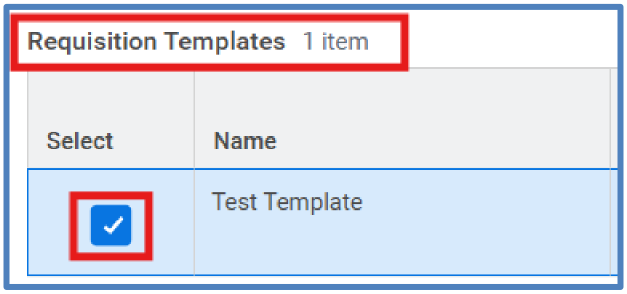
8. Select **Save Changes**.



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



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



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:

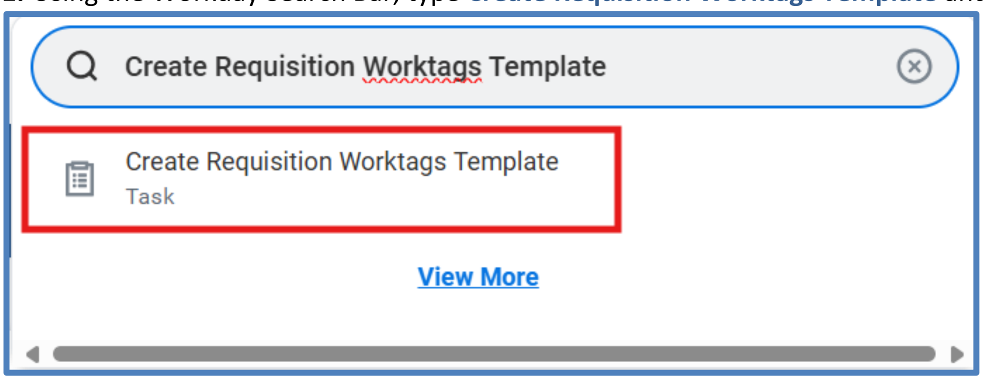
- Company*: One or more companies must be specified.
- Requisition Type
- Description
- Spend Category
- Supplier
- Order-From Connection
- Worktags*: Required and may be split across multiple worktags

Requisition Worktags templates do not include the following:

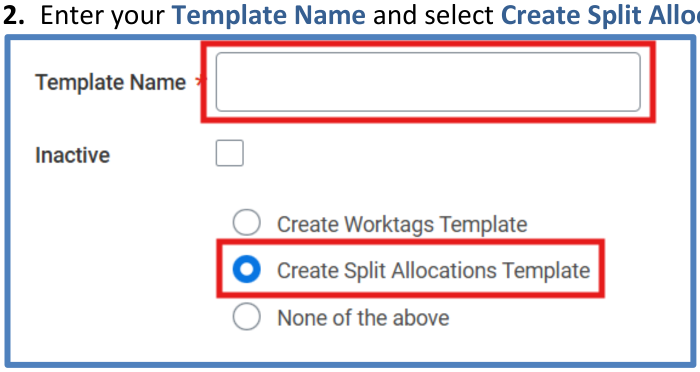
- Commodity Code
- Supplier Contract

Create Requisition Worktags Template – For Allocations:

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



2. Enter your **Template Name** and select **Create Split Allocations Template**.



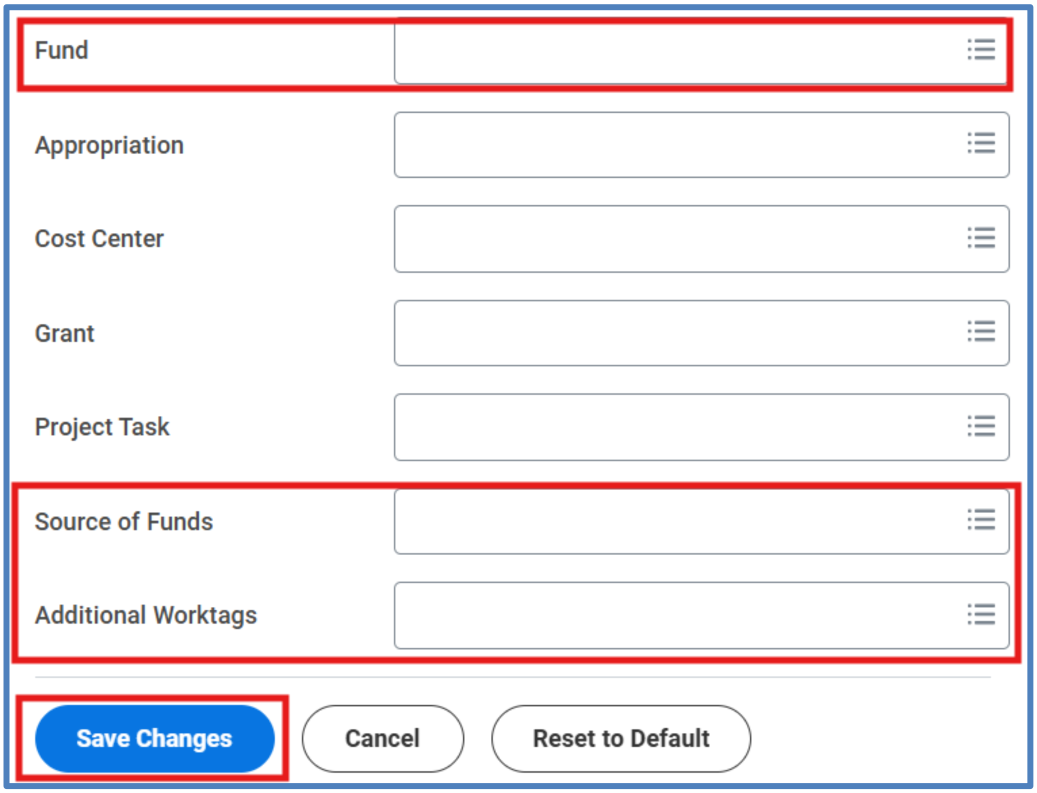
3. The total percentage allocation must equal 100%. An initial line will automatically populate within the template. To add additional lines, select the (+) icon. For each line, ensure you specify the following details:

a. Percentage
b. Appropriation
c. Source of Funds

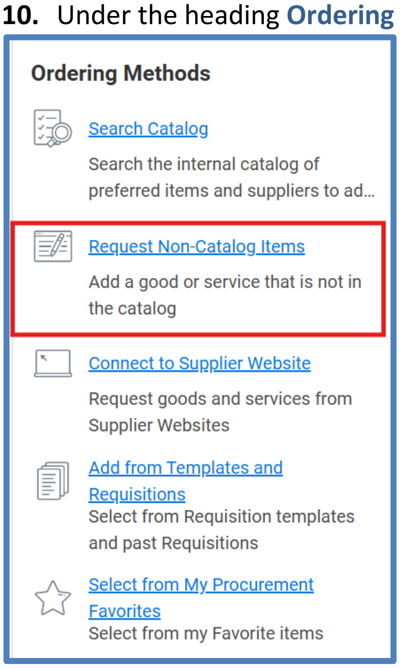
   d. Any applicable additional Worktags

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**.

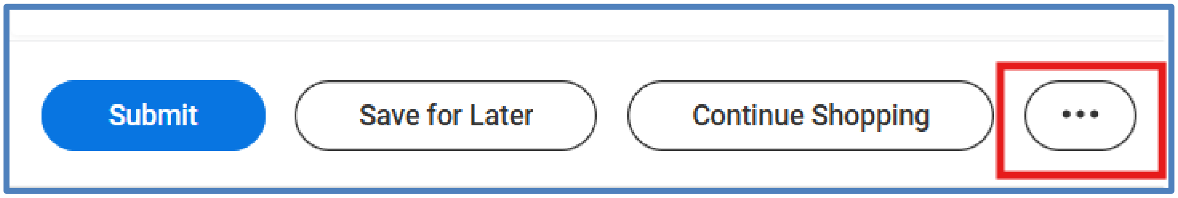


10. Under the heading **Ordering Methods**, select **Request Non-Catalog Items**.

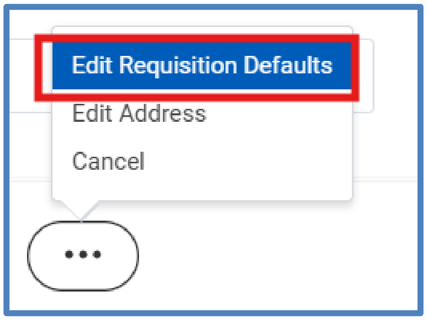


11. Proceed by entering your requisition details.

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.