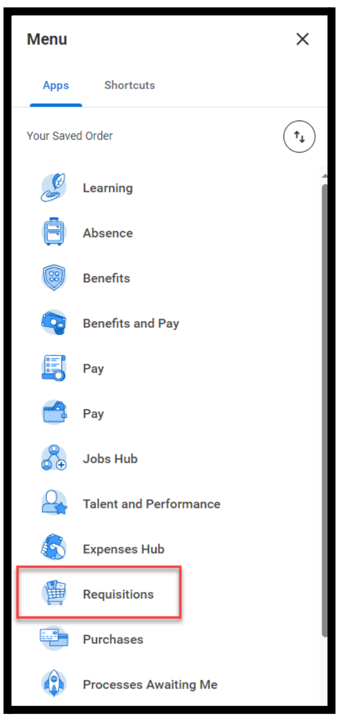
Procurement: Create Supplier Purchase Requisition via Website (Punch Out)

This quick reference guide will cover the process of creation of a Supplier Purchase Requisition, the initiation step for a Purchase Order, via Connection to a Supplier Website (also known as a Punch Out order).
Note: for Non-Catalog Requests see **Create Requisition**, which is handled differently.

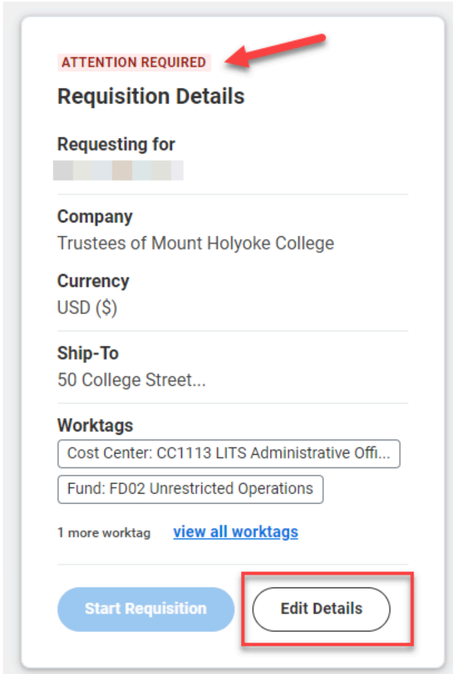
Confirm Requisition Details

1. After logging into Workday, click the **General Navigation Menu** icon at the top left corner. Find and select the **Requisitions** App



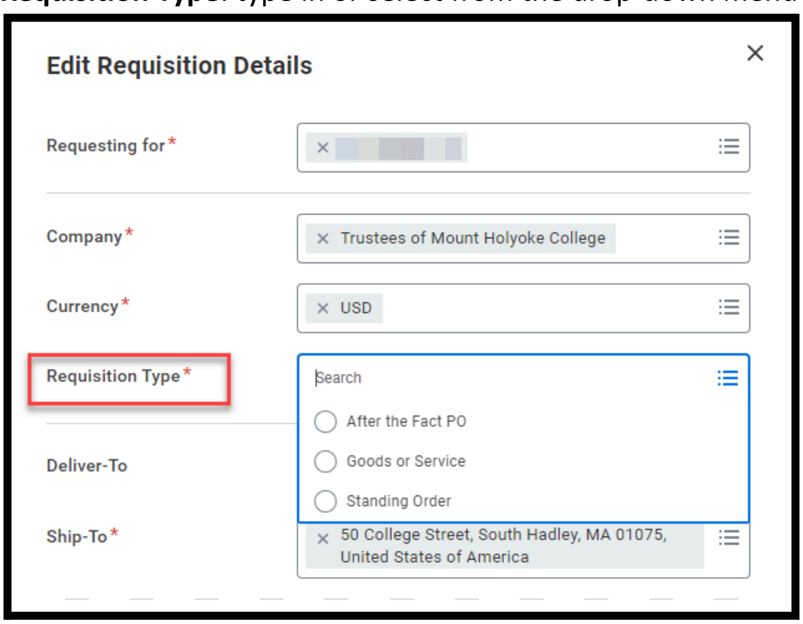
2. **Define your default settings:** To update your **Requisition Details**, click the **Edit Details** button and confirm that the correct information is reflected on the following screen.

Note this step may be required the first time you use the Requisitions App.



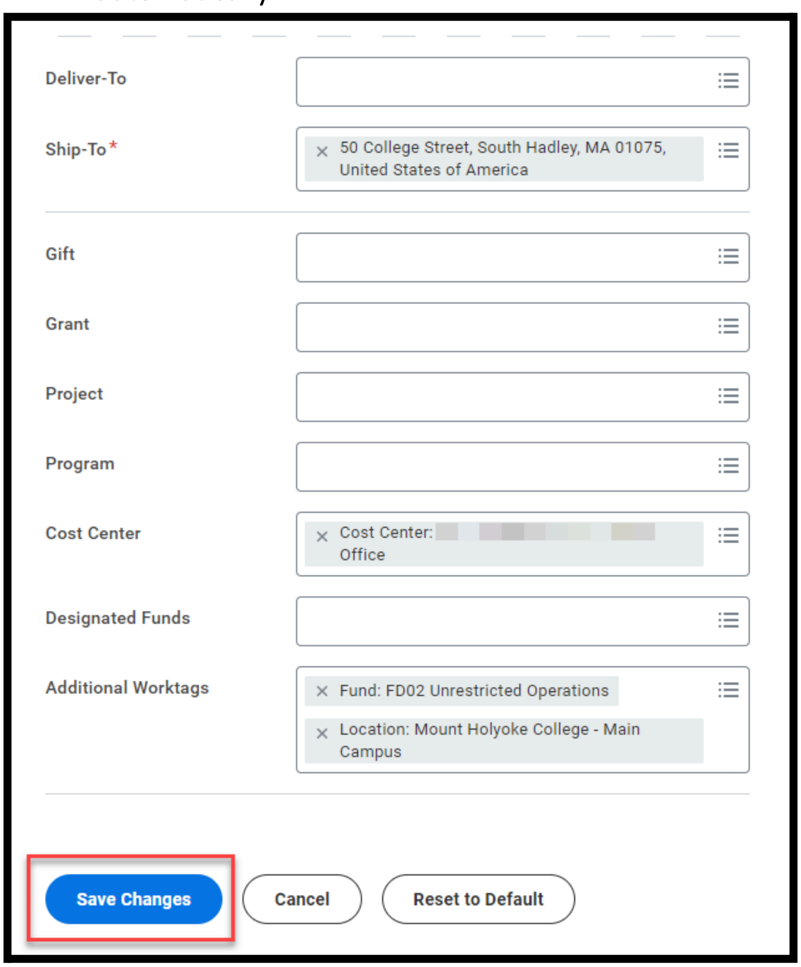
On the top part of the **Edit Requisition Details** screen, confirm/edit the following:

- **Requesting for**: defaults to the user; change if you request on behalf of someone else by default.
- **Company**: This field defaults to *Trustees of Mount Holyoke College*.
- **Currency**: This field defaults to *USD*.
- **Requisition Type**: type in or select from the drop-down menu options.



- **Deliver-To**: type in or select from the drop-down menu options a location for delivery once item(s) are received by Mount Holyoke College. This is required for Goods Requisitions. Be sure to select your building and/or appropriate room number in the Deliver-to location.
- **Ship To**: This field defaults to the Mount Holyoke College Receiving Department.

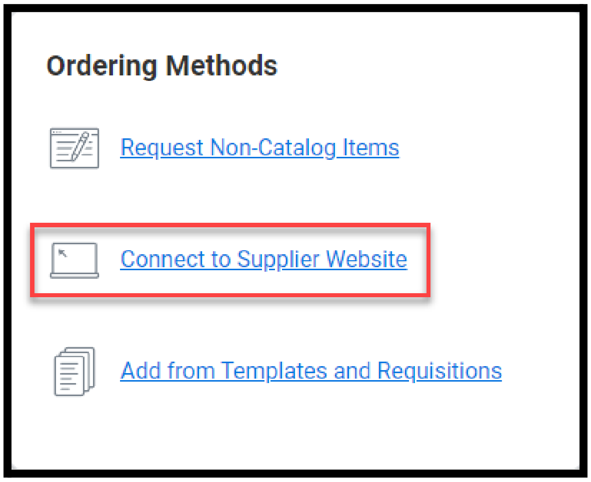
3. Verify the **Worktags**.
   - **Cost Center** identifies which cost center will pay for the item. This field defaults to the requester's Cost Center.
   - **Additional Worktags** will default based on this and other identifying information entered. If the Requisition item will be funded by a source other than the requester's default cost center, click the x in the corresponding area to remove the default cost center and the additional worktags; then search for the appropriate alternate worktag.
   - **Gift, Grant, Project, Program,** and **Designated Funds** are driver worktags. Once entered, the Cost Center and Additional Worktags fields will be filled in automatically.



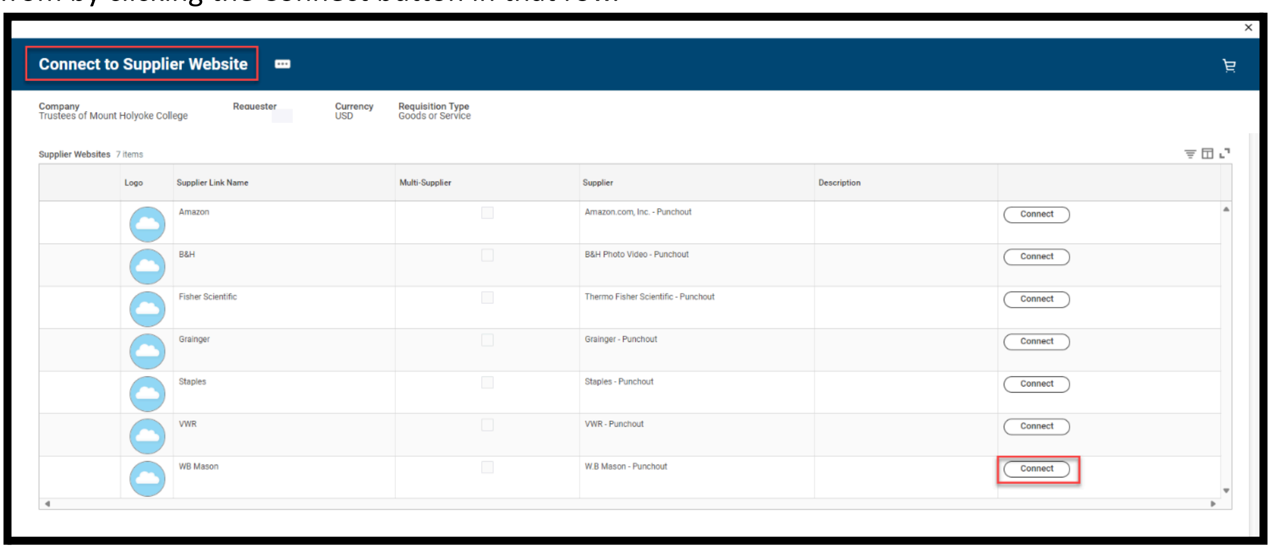
4. Once you have confirmed or made necessary changes to this information, click the **Save Changes** button.

Create a Requisition via Connect to Supplier Website (Punch Out)

1. From the Requisitions App, click on the **Connect to Supplier Website** link from Ordering Methods.

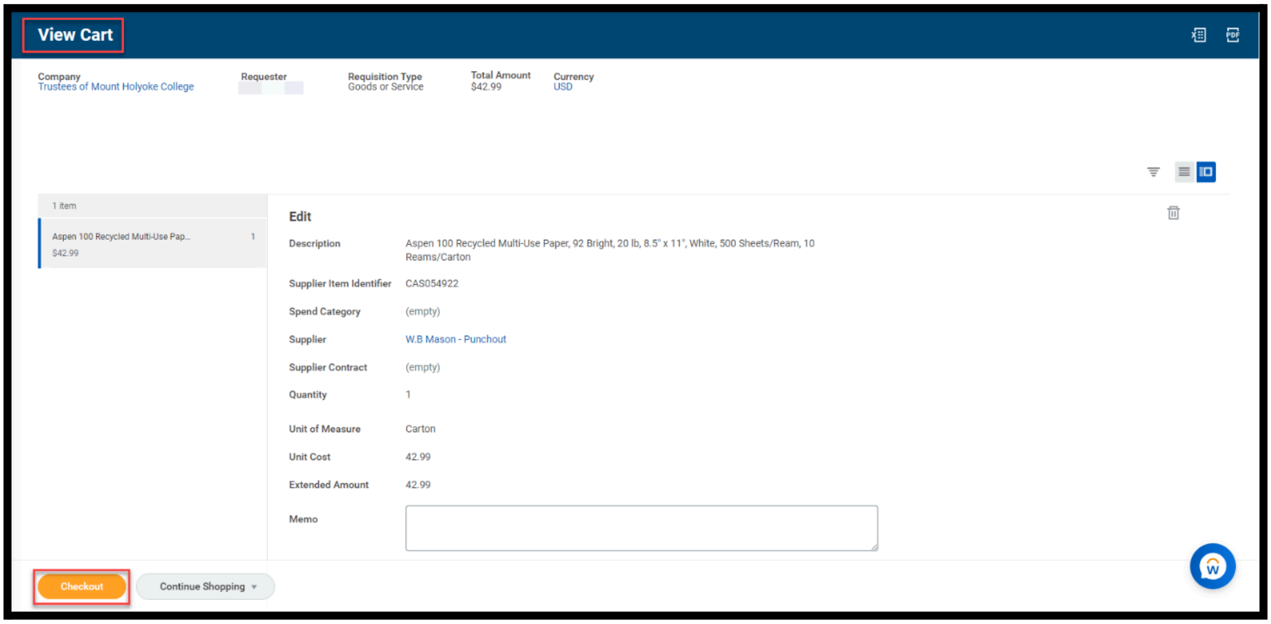


2. On the **Connect to Supplier Website** screen, choose the Supplier you wish to purchase from by clicking the Connect button in that row.

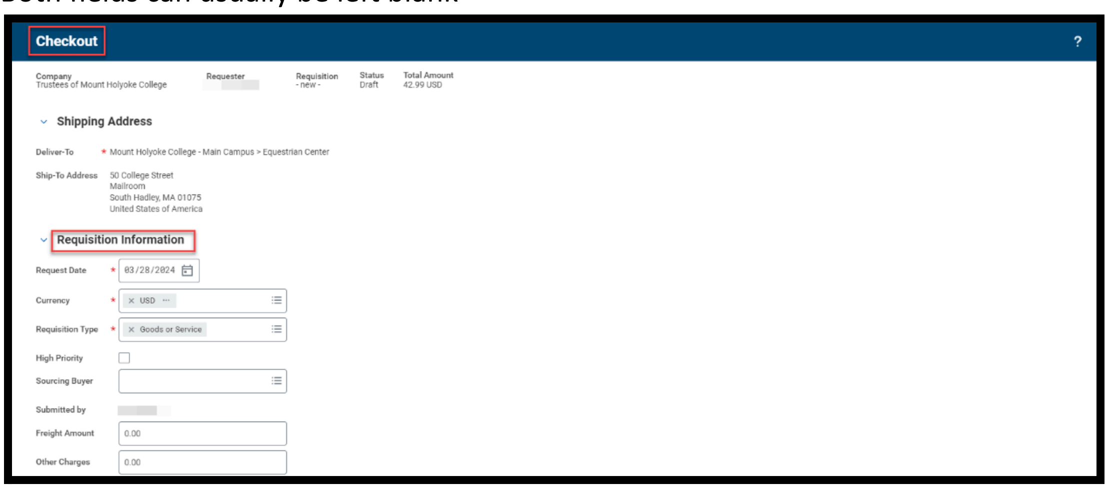


3. You will be taken to that Supplier's Website; confirm that you are logged in through your account with that site (varies by Supplier site).
4. Select your item(s) as you normally would and add them to the site's Cart (exact steps will vary by Supplier). When you have added all purchases, continue to the site's Checkout.

5. You will be returned to the Workday **View Cart** screen to review the item(s) for purchase. When you have confirmed the details for each item, click **Checkout**.



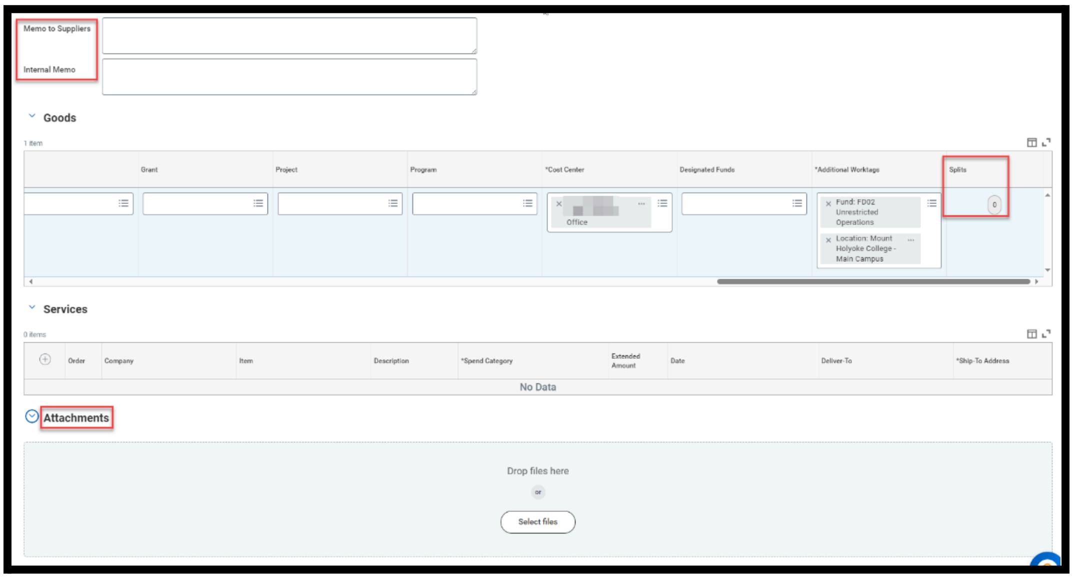
6. On the **Checkout** screen, review that all the Requisition information displayed is correct. Make changes as necessary.
7. Review the following fields:
   - **High Priority**
     i. To be selected in emergency circumstances only
   - **Sourcing Buyer**
     i. The individual completing the requisition
   - **Freight Amount** or **Other Charges**
     i. Both fields can usually be left blank



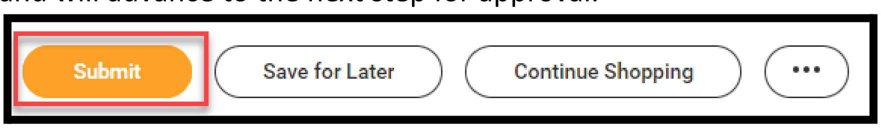
   - Memos
     i. **Memo to Suppliers** will display on the Purchase Order and is visible to the Supplier

ii. **Internal Memos** are viewable only by Mount Holyoke College employees

8. Review the line items for the requested Goods and/or Services
   Note: Scroll right to view all the fields, paying particular attention to the following:
   - Ensure Spend Category, Cost Center, and Worktags are correct for each line item
   - If a funding split is needed, scroll all the way right and click on the oval-shaped **Splits** button. Select whether the split is by Amount or Quantity, and enter necessary information as indicated for each Cost Center involved on the screen that pops up. Click on **Done** to return to the Cart.
   - Click **Attachments** and submit quote(s), email notification, or Website screenshot as supporting documentation.



9. When all information is correct, click **Submit**. Your Punch Out Requisition is completed and will advance to the next step for approval.



   - **Save for Later** allows the user to return to the Requisition, saving the current information entered.
   - **Continue Shopping** also retains the current information in the Cart so that the user can add more items to the Requisition.
   - The **More** actions menu (. . .) allows users to edit information from previous screens while keeping information in the Cart.

10. When finished, click **Submit**.
11. You will see a pop-up confirming that you have successfully submitted. The **Requisitions** screen will now show the newly-submitted open item, as well as showing the **Awaiting**

Action by, following the progress of the Requisition from Ordering through Invoicing.