*Exercise 1.1: Search in Workday*

Scenario

A guest speaker is coming to UNLV to speak to the Human Resource Department. It is for an annual lecture on Ethics and Conduct. Please create a requisition for a future date.

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| Step | Data to Enter or Select |
| 1. Type **Create Requisition** in the Search Bar and click Enter. |  |
| 1. Enter the appropriate **Company** if it is not yet filled out correctly   The user’s name should be in the **Requester** box, the user can change this if applicable. The person who is receiving the service should be in this field  **Currency** should be USD.  Select **Guest Speaker** from the Requisition Type drop-down box.  Then click **OK**  in the bottom left corner. |  |
| 1. On the next screen, click **Request Non-Catalog Items**. |  |
| 1. **Enter line items for services you want to purchase.** Complete information for the service that you want to purchase   **Non-Catalog Request Type\***: Select **Request Service**  **Description\***: Provide description of the of the Service, including the business purpose of the guest speaker or Independent Service Provider.  **Spend Category\***:  Choose the **SC0388 – Guest Speaker/ Lecturer** for Guest Speaker  For an ISP or Independent Contract choose the appropriate Spend Category  **Supplier:** Type Supplier name click enter. It is best practice for the Supplier to be in the Workday system before creating a requisition.  **Supplier Contract**: Leave this Blank.  **Start Date** and **End Date**: Enter in expected Start Date and End Date for the service.  **Extended Amount**: Please enter the cost amount for the service.  **Memo:** Provide any internal notes in the Memo Box. |  |
| 1. Click **Add to Cart**  . Then click **OK**  .   You will then be taken to a blank screen to request additional items. |  |
| 1. Click the **Shopping Cart Icon**  once all the line items are entered. |  |
| 1. The user can now view all the items in their shopping cart. They can edit the items if they need to here.   Click **Checkout**  in the bottom left hand corner to create a requisition for the items and services in your cart. |  |
| 1. **Review Shipping Address** Tab**:**   Review the **Shipping Address**. The Ship To Address is defaulted to the address for the UNLV main campus. If you require a different Ship To Address (i.e. the services needs to be shipped to another campus), you can either select an address from the drop-down list by clicking on the side of the Default Ship To Address Box and selecting a Location or by selecting Use Alternate Address and entering in the address. Select Apply Ship To Address Changes to All Lines if you require the alternate Ship To address on all line items on the requisition.  Click **Next**  . |  |
| 1. **Information** Tab**:**   **Requisition Type**: Should be already filled in as Guest Speaker  **Sourcing Buyer**: Leave this blank.  **High Priority**: Leave this Blank  **Memo to Suppliers:** Leave this Blank  **Internal Memo**: If you have any internal comments for the requisition, you may include them here. Note here the name of Supplier and contact information if Supplier is not in Supplier Registration.  Click **Next**  . |  |
| 1. **Attachments** Tab:   **Add Attachments**: You need to attach any quotes, agreements, terms and conditions or any other attachments associated with the purchase here. To attach a file you can either drop the file in the designated box or click **Select files** to select a file to attach.   Check **External** to include the attachments for your supplier. If you don't select this option, the attachments are available only to workers in your organization. When you create purchase orders from requisitions, Workday automatically includes external attachments from requisitions on the purchase order. Add comment to the attachment if needed.  Click **Next**  . |  |
| 1. **Line Defaults** Tab:   **Requested Delivery Date**: This may be left blank  **Supplier:** Make sure the Supplier is filled in here. (If this is NOT a guest speaker or independent contractor requisition type you may leave blank if Supplier is not registered yet or purchase will be subject to a formal RFP/Bid to be processed by the Purchasing Department)  **RFQ Requirements**: Leave this alone. The RFQ process is being handled outside of Workday.  **Default Worktags and Splits**: Choices are:   * Copy from Worktags Template: to copy from a set of commonly used worktags or split allocations. Use the Create Requisition Worktags Template task to create requisition worktags templates * Use Default Worktags: DO NOT USE * Use Default Splits: to default split allocations by percentage. The split allocation percentage defaults don’t apply to newly added requisition lines. * **None of the Above**: Worktag details can be completed during the Review and Submit step *(It is best to select None of the Above for this section until you gain better experience with Workday and Worktags.)*   Click **Next**  . |  |
| 1. **Review and Submit** Tab:   Review all goods and services on the requisition and add/change account information (Unit, Cost Center, Additional Worktags) that will be used for the purchase.  Leave the Fields **Item** and **Supplier Contract** blank.  You will need to delete out the default account information for Unit, Cost Center, and Additional Worktags and enter the correct Worktag information for the purchase. You can also split the cost of a line item between multiple Accounts.  Once all Worktag information for each line item is entered,Click **Submit** . | For this example you may use PG05426  **TIP**: Use this link to access the WAX tool! This will help you populate the worktags within Workday! You will input your OLD objects and it will map to your NEW objects in Workday  https://wax.unr.edu |
| **Next Step: Find your Requisition** | *How do you go back and submit, edit, or review a requisition?*  *Run the Report from Workday Search Bar:*   * *My Requisitions* |
| 1. Can you find your requisition?   What is the status of the requisition?   Where is the Edit Requisition button?  Can you see if there was a purchase order? |  |
| 1. Can you edit a Requisition in:   Draft? Yes  In Progress? Yes  Successfully Completed? No |  |
| **Next Step: Create a Supplier Invoice Request** | |
| 1. Type in **Create Supplier Invoice Request** task in the Search Bar |  |
| 1. In the **Primary Information** section fill out the required fields |  |
| 1. Under the Additional Information section   Complete the field for **Handling Code**   Fill out **Memo** field here to reference the Purchase Order number from the requisition. |  |
| 1. Go to the **Lines** Tab and click the Service Line and complete the information for that service line for the ISP/Guest Speaker. | **Item Description:** Description of the service that the ISP or Guest Speaker *(Guest Speaker for HR. Annual Lecture on Ethics and Conduct)*  **Spend Category:** *(Guest Speaker)*  **Extended Amount\*:** *(3,500)*  **Unit Cost, Unit, Cost Center, Additional Worktags (Program, Gift, Grant, or Project) – fill out with WAX TOOL**  **Memo:** (Work Order numbers) if applicable  **Internal Memo:** (Memo for the AP department) – *(Supplier Remit to Address is different)* |
| 1. Go to the **Attachments** Tab and add the Invoice |  |
| 1. Click **Submit.** |  |

**Notes:**

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**Congratulations! You have completed this exercise.**

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