Create Requisition - Materials Management Request

Initiator: *Requisitioner*

Description

This document outlines the steps for accessing the Purchases Worklet and using the requisition template to create and submit a requisition for Compressed Gas Cylinders in Workday.

Additionally, this guide demonstrates how to order special mixes, delete or add a new gas cylinder line item from the cart, edit the quantity or memo of the line item from the cart, and save or edit a requisition.

Key Updates

Effective **September 23, 2025,** the PPGG and related worktags entered on the **Add from Templates and Requisitions** or **Create Requisition** screens will be applied directly to all the requisition lines. The automatic assignment of the PPGG and related worktags mirrors the same user experience when creating any other new requisition order.

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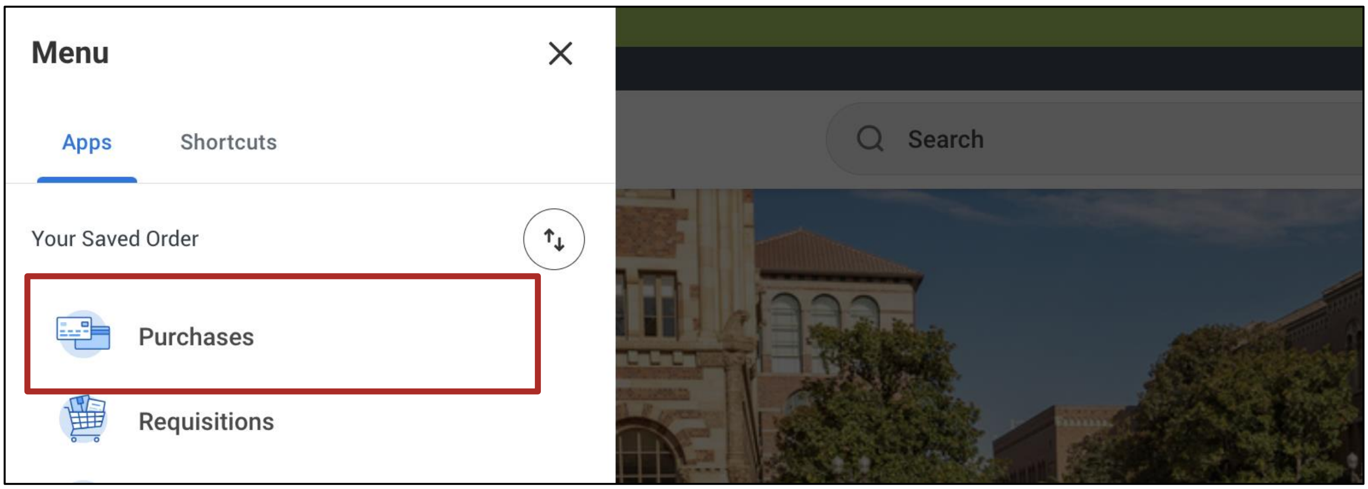
Accessing the Purchases Worklet

Note: You can also refer to the **Add an App or Dashboard to Your Menu** tips and tricks guide for expanded instructions on accessing apps.

From the Workday **Home** screen:

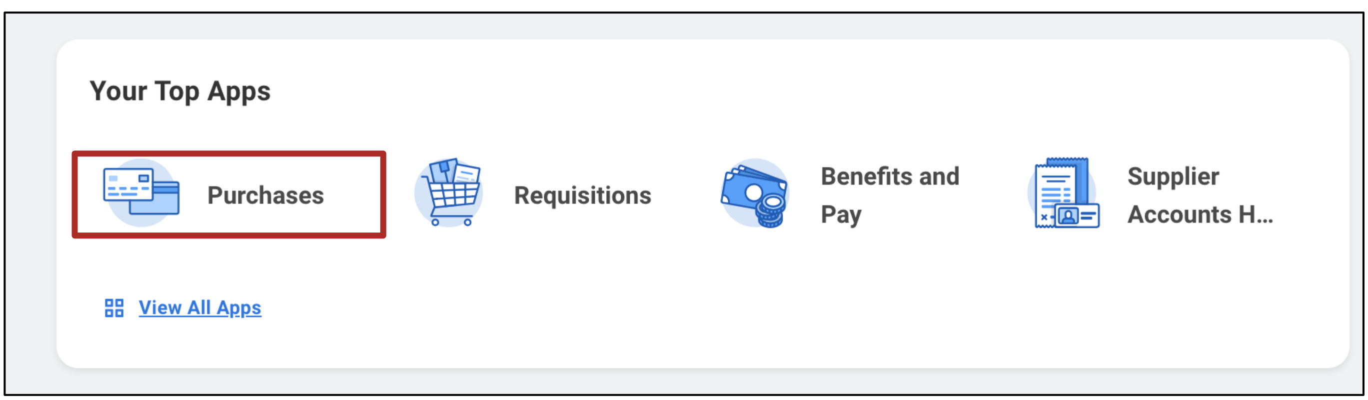
1. Navigate to your **left-hand** menu.
2. Select the **Apps** tab.
3. Select the **Purchases** Worklet or add the **Purchases** worklet to your **Apps** tab if it is not already listed.



Note: Alternatively, you can access the **Purchases** worklet through **Your Top Apps** if it is a worklet you frequently use.

From the Workday **Home** screen:

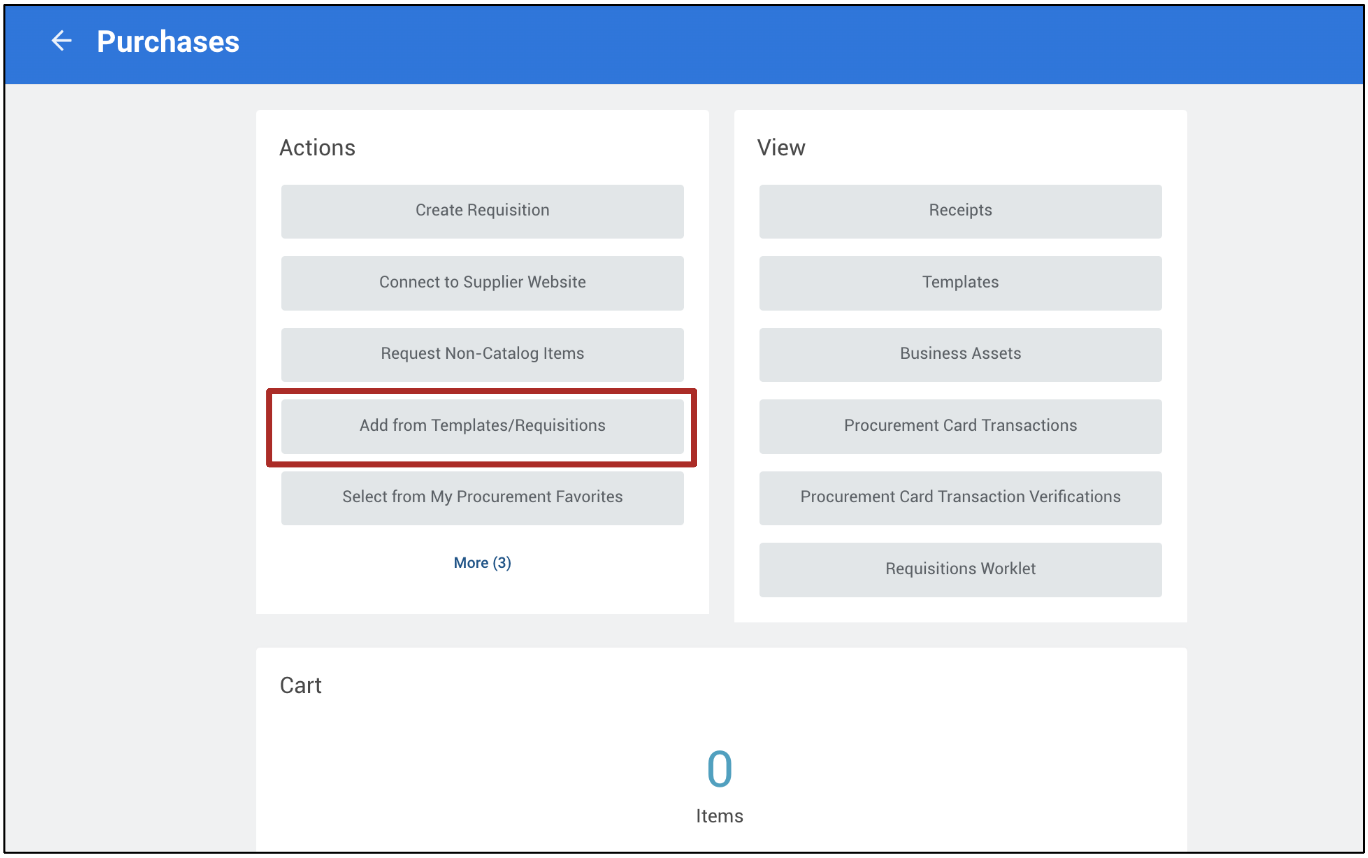
1. Scroll down to **Your Top Apps.**
2. In **Your Top Apps,** select the **Purchases** worklet.



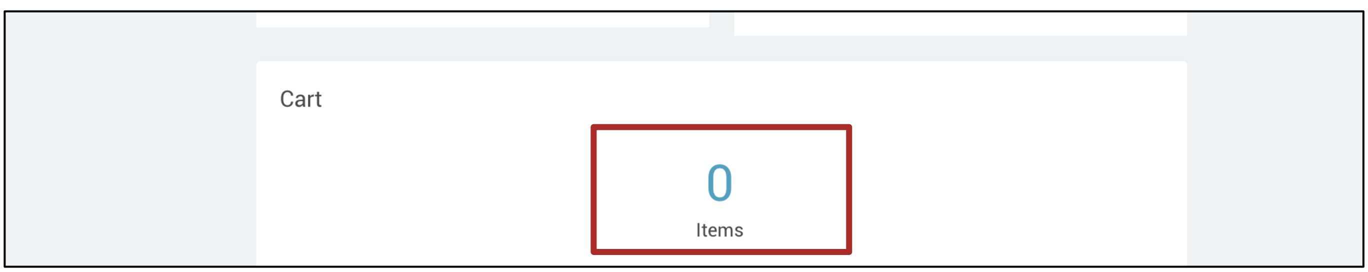
Creating the Requisition

From the **Purchases** screen:

4. In the **Actions** section of the screen, select the **Add from Template/Requisitions** option.

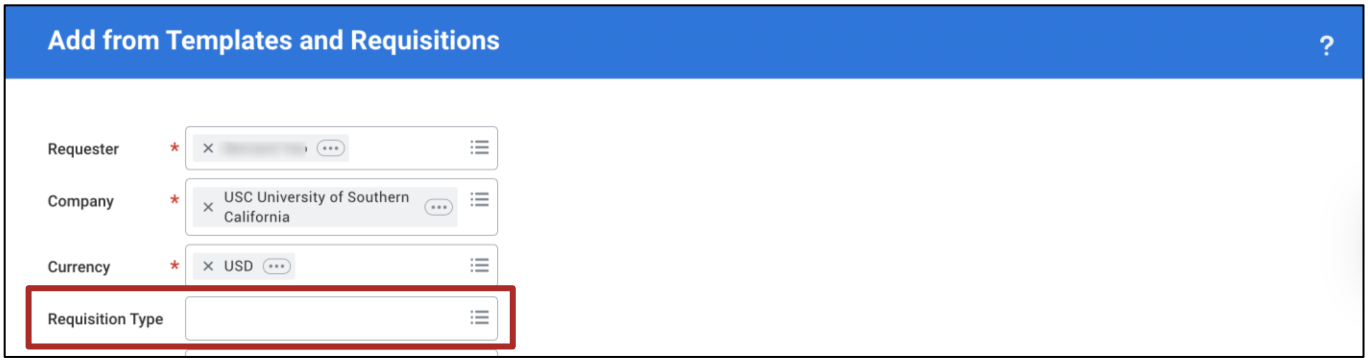


Note: The **Cart** section of the screen should show **0 Items**. Remove existing **Items** from the **Cart** before creating the **Gas Cylinder Order.**

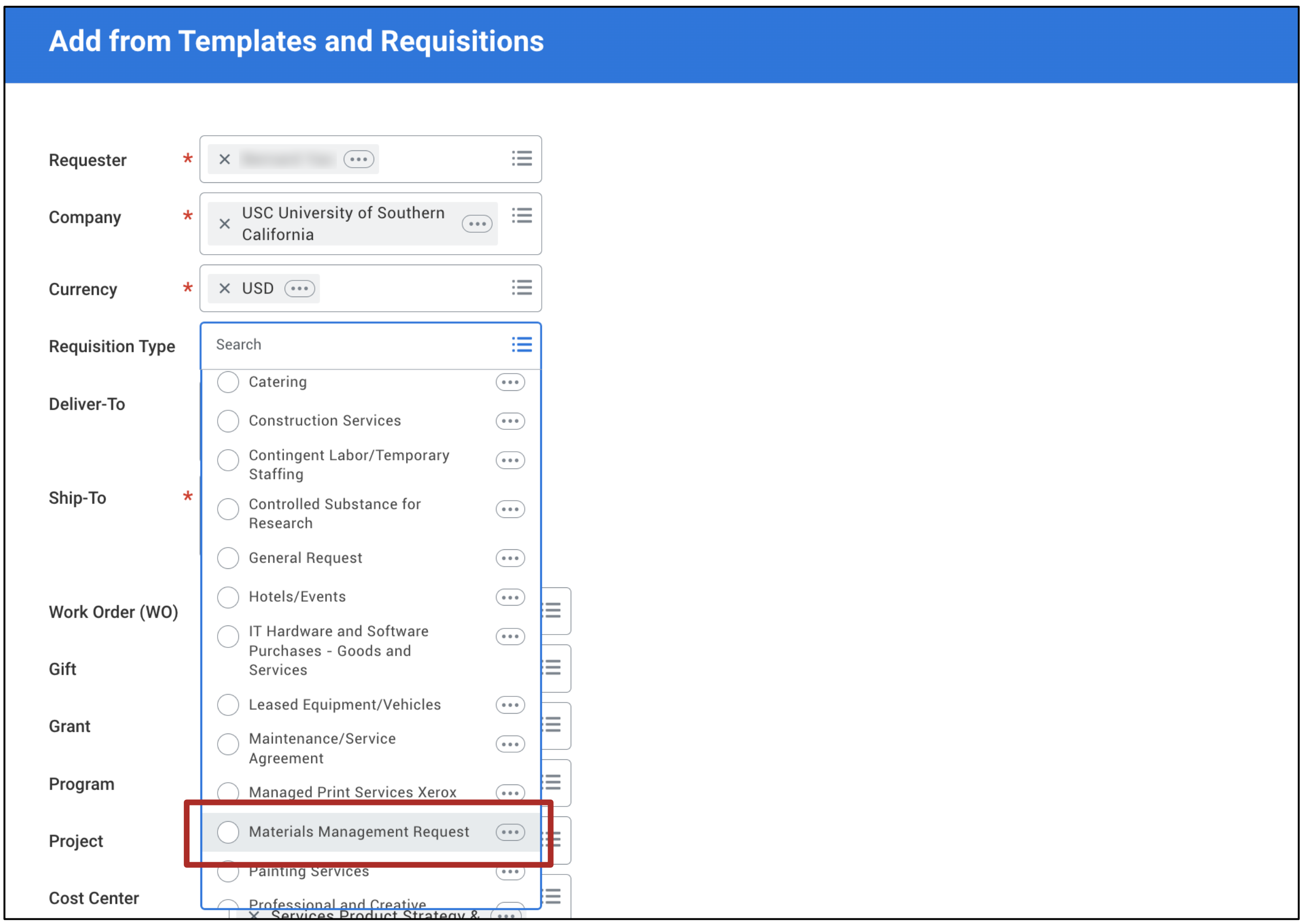


From the **Add from Templates and Requisitions** screen:

5. Select the **Requisition Type** field.



6. Select the **Materials Management Request** radio button to select the **Requisition Type.**

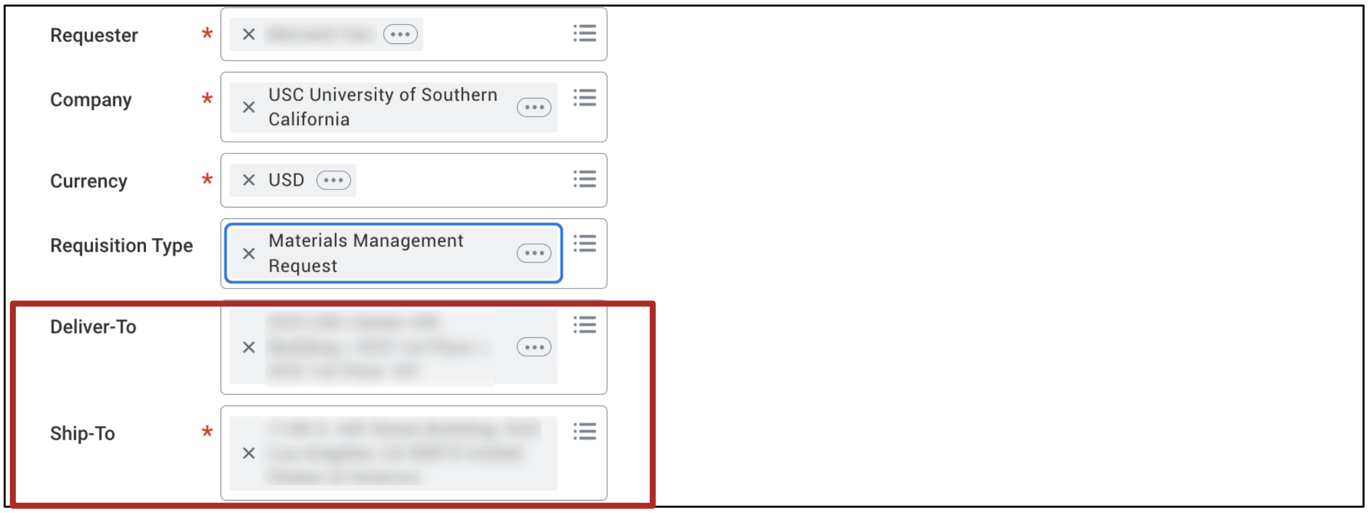


7. The **Deliver-To** and **Ship-To** fields are auto-populated based on the Requestor's default workspace. The Deliver-To and Ship-To combo can be edited in this section.

   Notes:

   - Reference the **Default Deliver-To Work Space** QRG to update the **Deliver-To** field.

- Most Materials Management Requests for Gas Cylinders will be delivered to Labs/Specialty locations. Add the proper delivery location in the **Memo to Suppliers** field, as shown in **Step 19** to ensure cylinders are delivered to the desired location**.**



8. In the **Gift, Grant, Program,** or **Project** field, enter the **PPGG** value for this purchase.

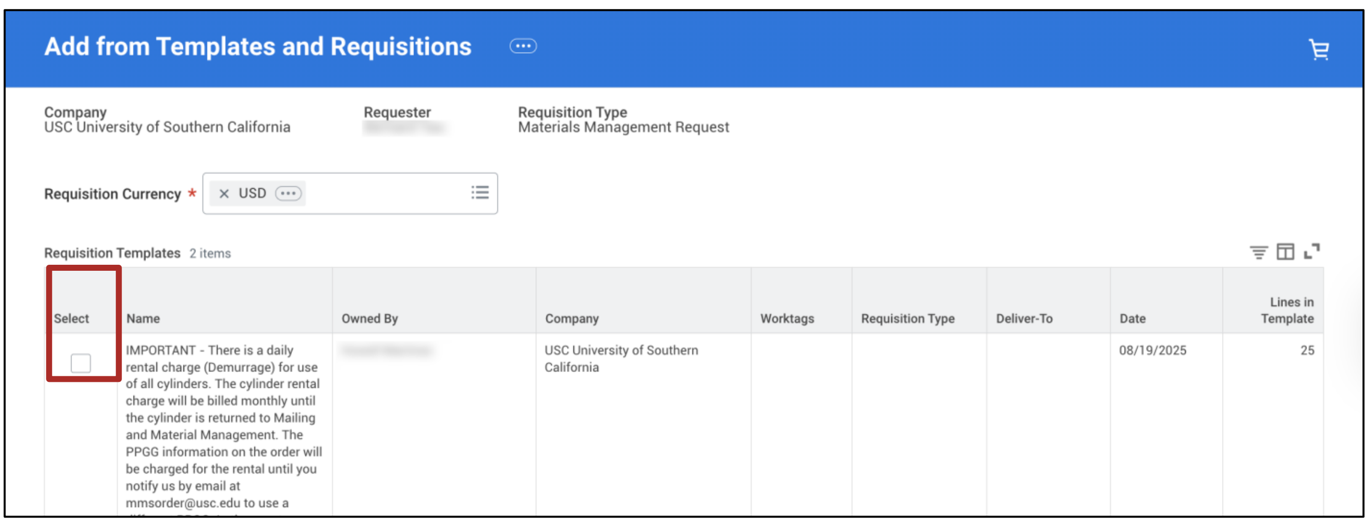
Notes:

- If, for some reason, you need to apply a mix of PPGGs for different quantities of gas cylinders lines, then leave the PPGG fields blank for this step. You will be able to enter this information at **Step 24** on the line level.
  - The **Cost Center, Fund, Function,** and any **Additional Worktags** associated with the PPGG will auto-populate.

9. Once PPGG entries have been completed, select **OK.**

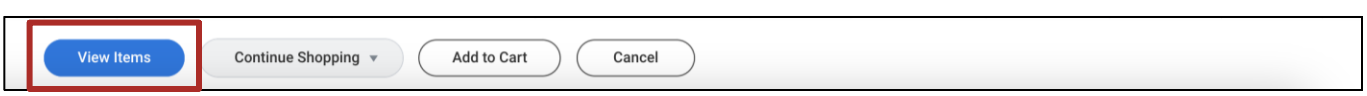
From the **Add from Templates and Requisitions** screen:

10. In the **Requisition Templates** section, select the checkbox for the template for the Gas Cylinders purchase you are looking to make.

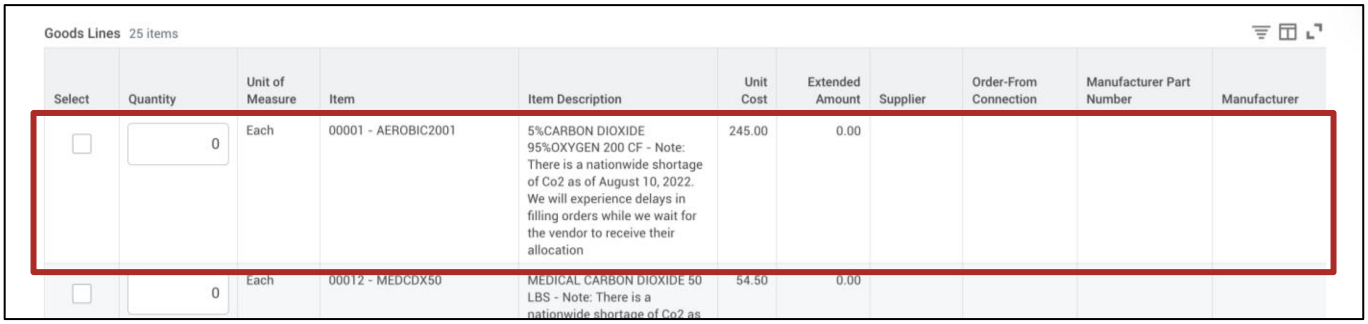


11. Select the **View Items** button. **DO NOT** select Add to Cart.

    Note: If the **Add to Cart** button is selected, all gas cylinder items will be added to your cart, and any items added in error will need to be manually deleted. Refer to the **Additional Instructions** section at the end of this guide for steps on **Deleting a Gas Cylinder Line Item from the Cart**.

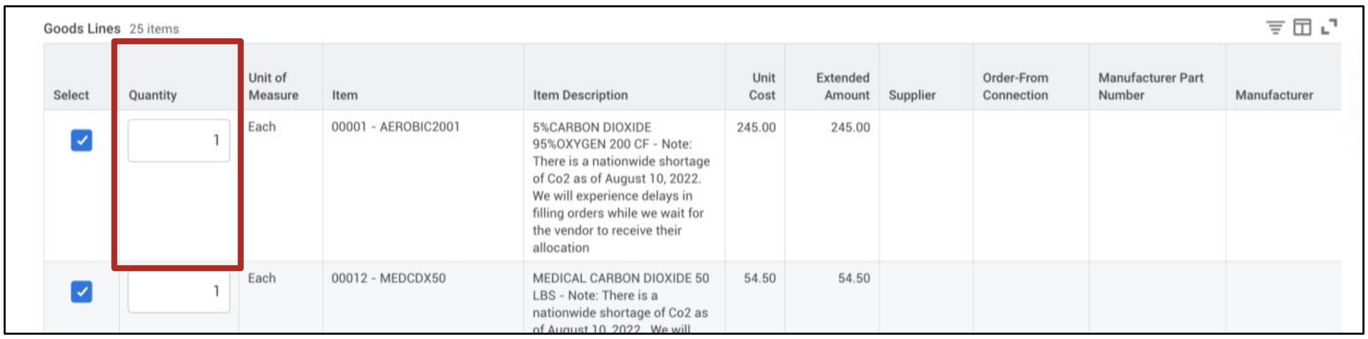


12. In the **Good Lines** section, find the cylinders that need to be ordered.



13. Select the **Quantity** field for that cylinder.

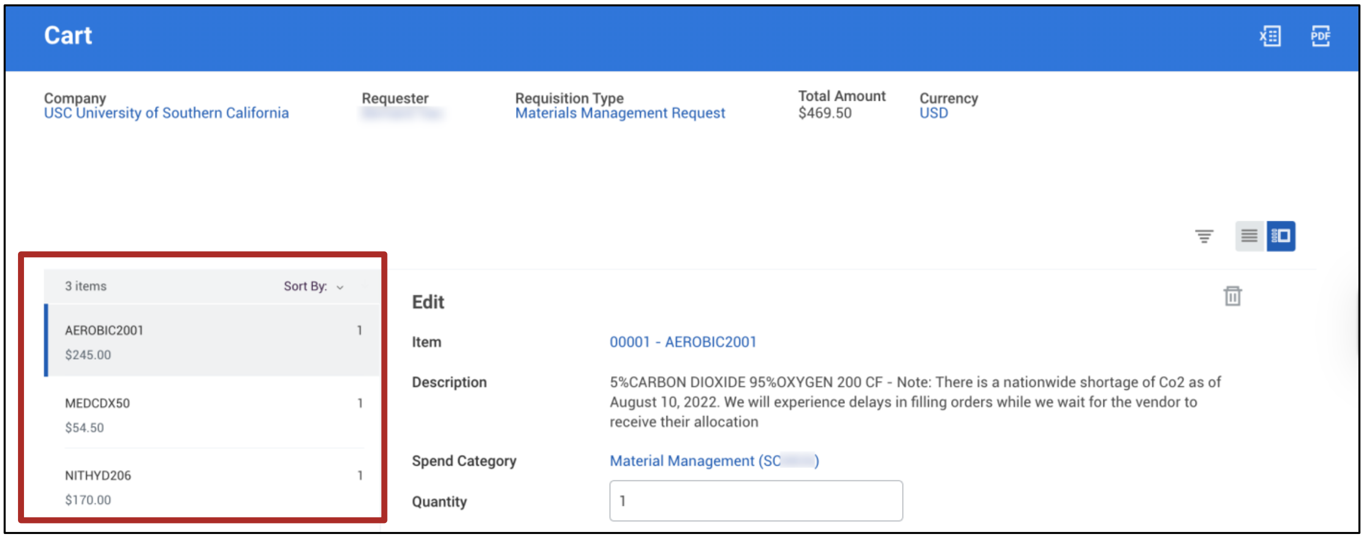
14. Enter the desired quantity. The system will auto-select the **Select** checkbox.



15. After the desired line-item quantities have been entered, select **Add to Cart.**

From the **Cart** screen:

16. In the left-hand column, the **Cart** will list the line **items** selected from the template.

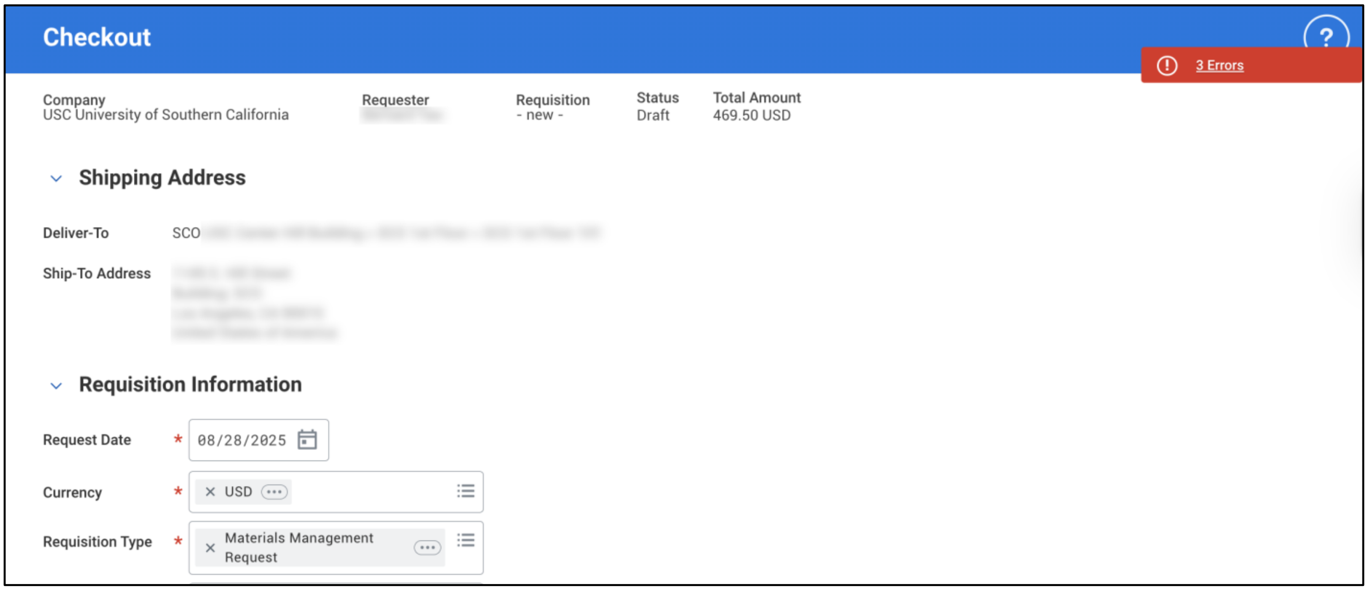


Note: To delete/add an item from the **Cart** or to provide additional instructions for **Ordering Special Mixes** refer to the **Additional Instructions** section of this guide.

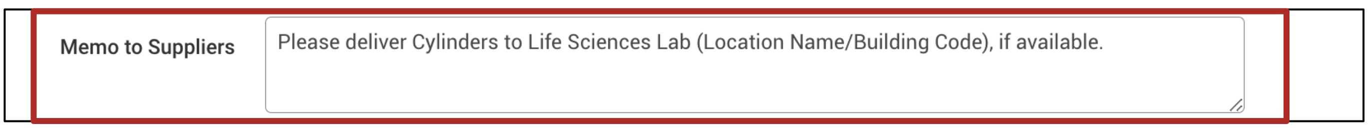
17. Confirm the selected items and select **Checkout.**

From the **Requisition Information** section of the **Checkout** screen:

18. Review the already populated fields.

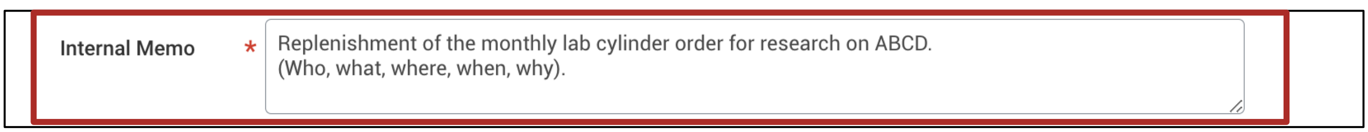


19. In the **Memo to Suppliers** field, enter the lab location for the Gas Cylinders being ordered.

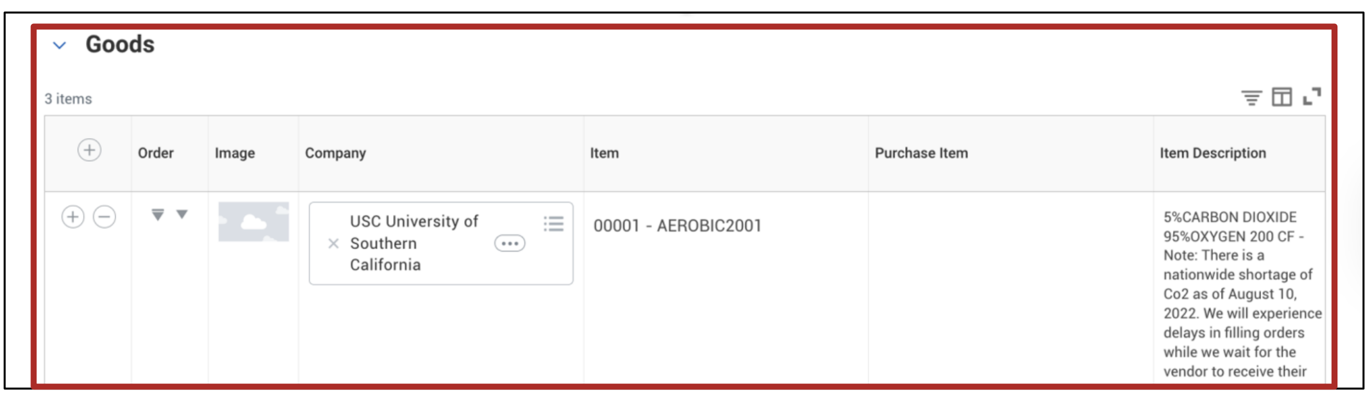


20. In the **Internal Memo** field, enter the business justification.

    Note: The business justification should address the who, what, when, where, and why of the purchase.



21. Navigate to the **Goods** section of the screen.



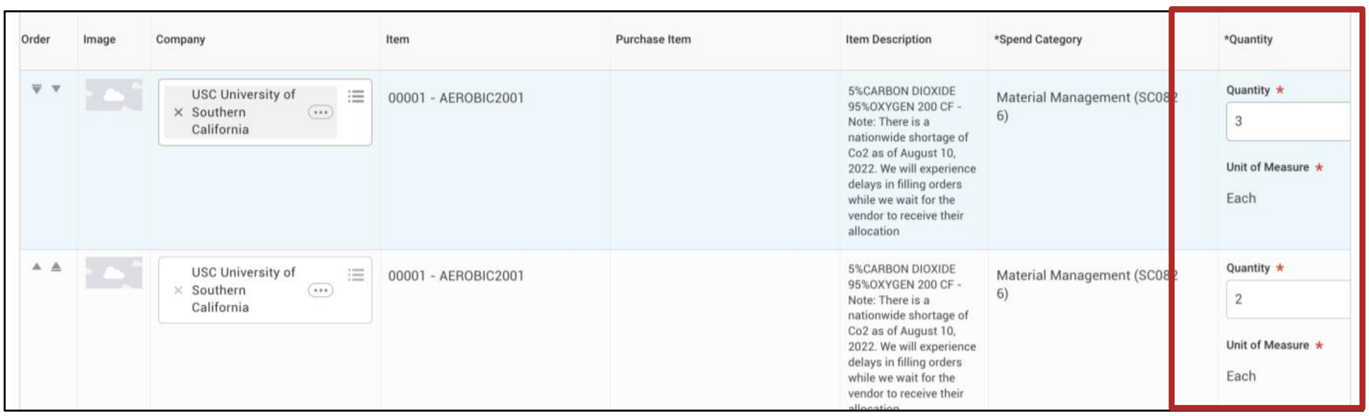
22. In the **Goods** section of the screen, scroll to the right and review the PPGG worktag for each goods line.

23. The **Cost Center, Fund,** and **Function** fields are prepopulated based on the PPGG worktag entered in the previous steps. Continue navigating to the right to review the prepopulated values.

24. ***Optional:*** This step is for splits only. When creating a requisition for materials management, you can split the quantity by PPGG.

    Notes:

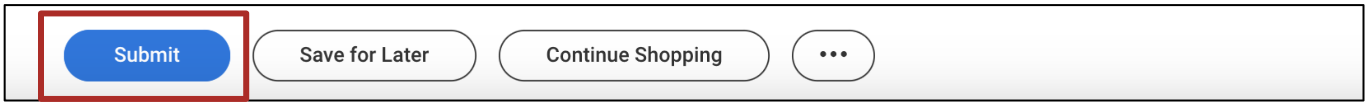
- To set up the quantity split for the same gas cylinder, you will add new line(s) as needed, and for each line, only one PPGG is to be assigned with the specific quantity.



- In the **Memo** column of each line, enter the following ***SPLIT PPGG - See line items for more information.***

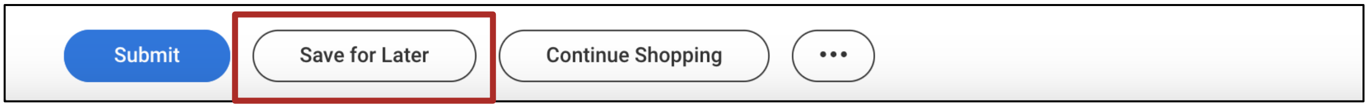
- The **Quantity** and **Memo** fields for each line can also be updated from the **Cart.** Review the [**Updating the Memo of Gas Cylinder Line Item from the Cart**]() and the [**Updating the Quantity of Gas Cylinder Line Item from the Cart**]() sections of this guide for more information.

25. Select **Submit.**



Notes:

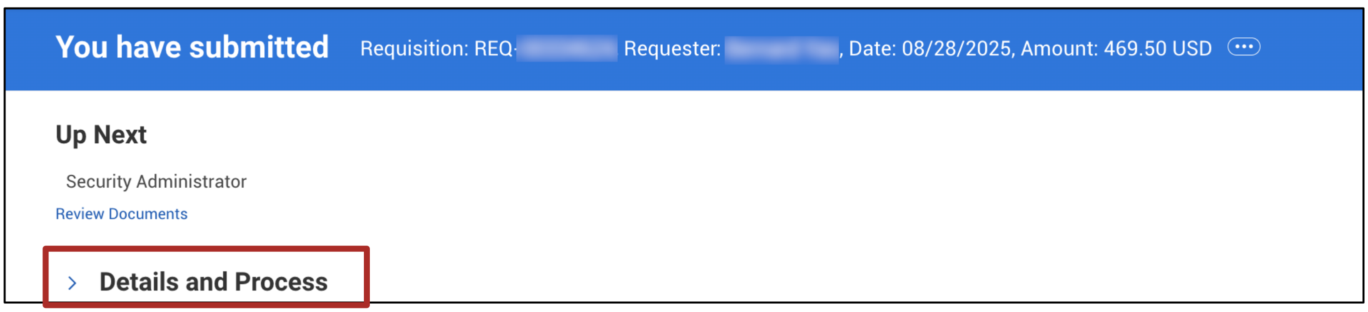
26. To save a **Requisition** with line Items from the **Checkout** page, select **Save for Later**. The system will generate a REQ #.



- If the **Save for Later** option is selected, then follow the steps in the **[Editing a Requisition]** section of this guide to edit a requisition in **Draft** status.

27. Once the **Requisition** is submitted, the system will generate a **REQ #** for tracking. After the **Cost Center Manager** or **Grant Manager** approves it, the **Materials Management team** will process the REQ and fulfill the order. A purchase order is not issued for these types of orders and Materials Management will charge the department's PPGG via an MMS (SC Logic) Journal.

    Note: Select the **Details and Process** option to review the details of the submission.



You have successfully completed this task.

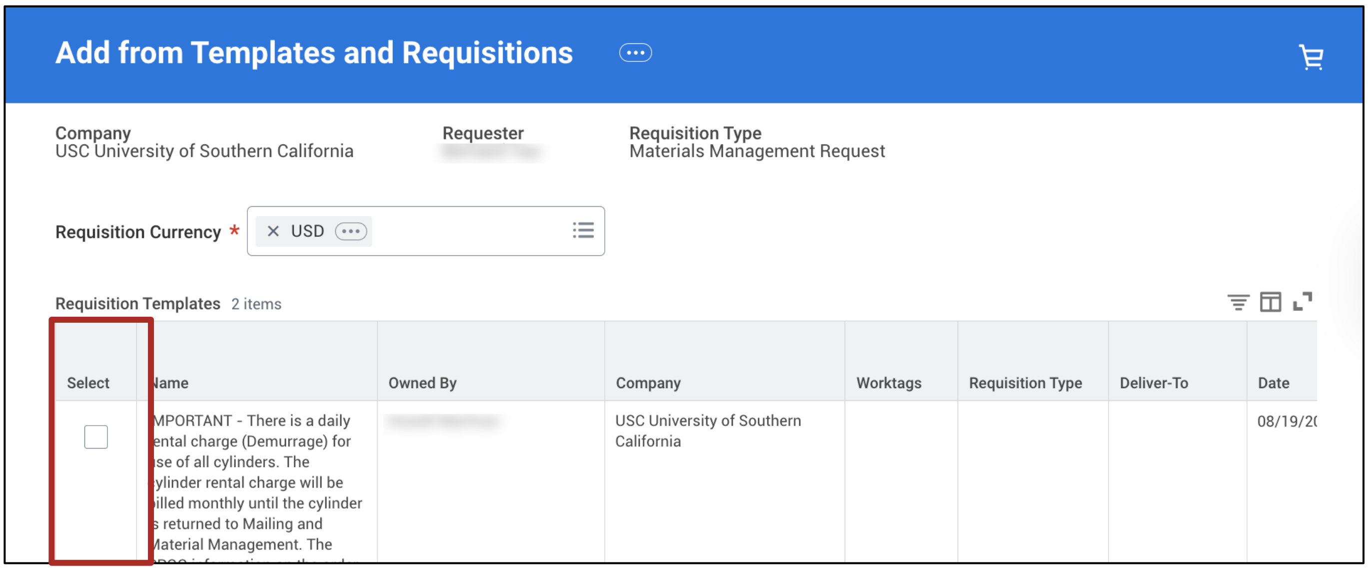
Additional Instructions

Ordering Special Mixes

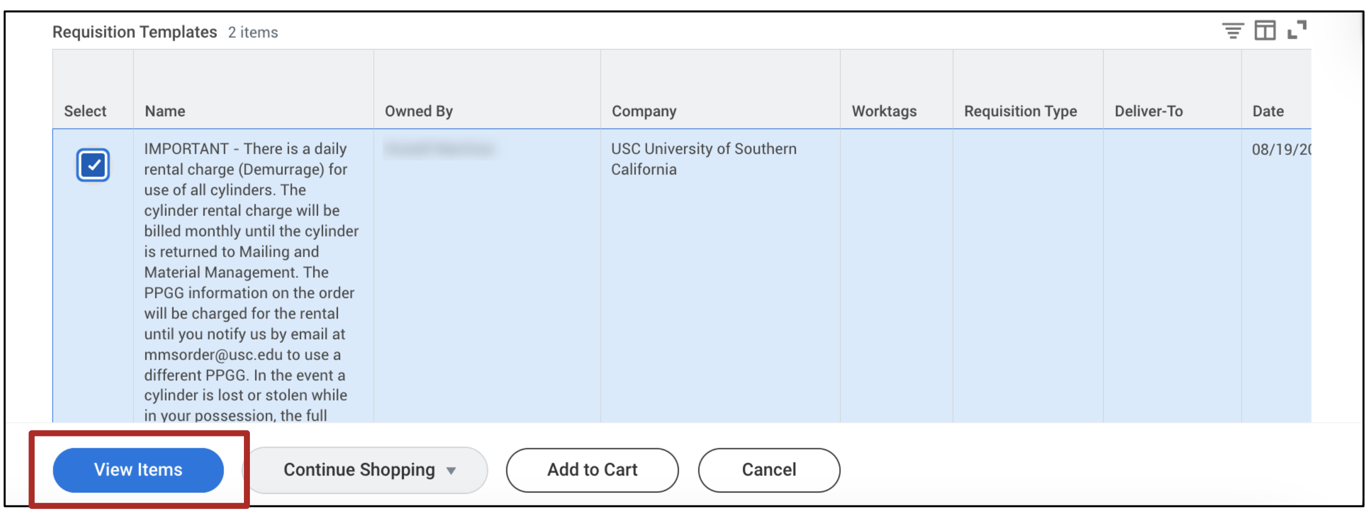
Follow the steps in the **Create Requisition** section of this guide to access the purchases worklet and select the **Add from Templates and Requisitions** option.

From the **Add from Templates and Requisitions** screen:

1. In the **Requisitions Templates** section of the screen, select the checkbox of the template for **Gas Cylinders** in the **Select** column.

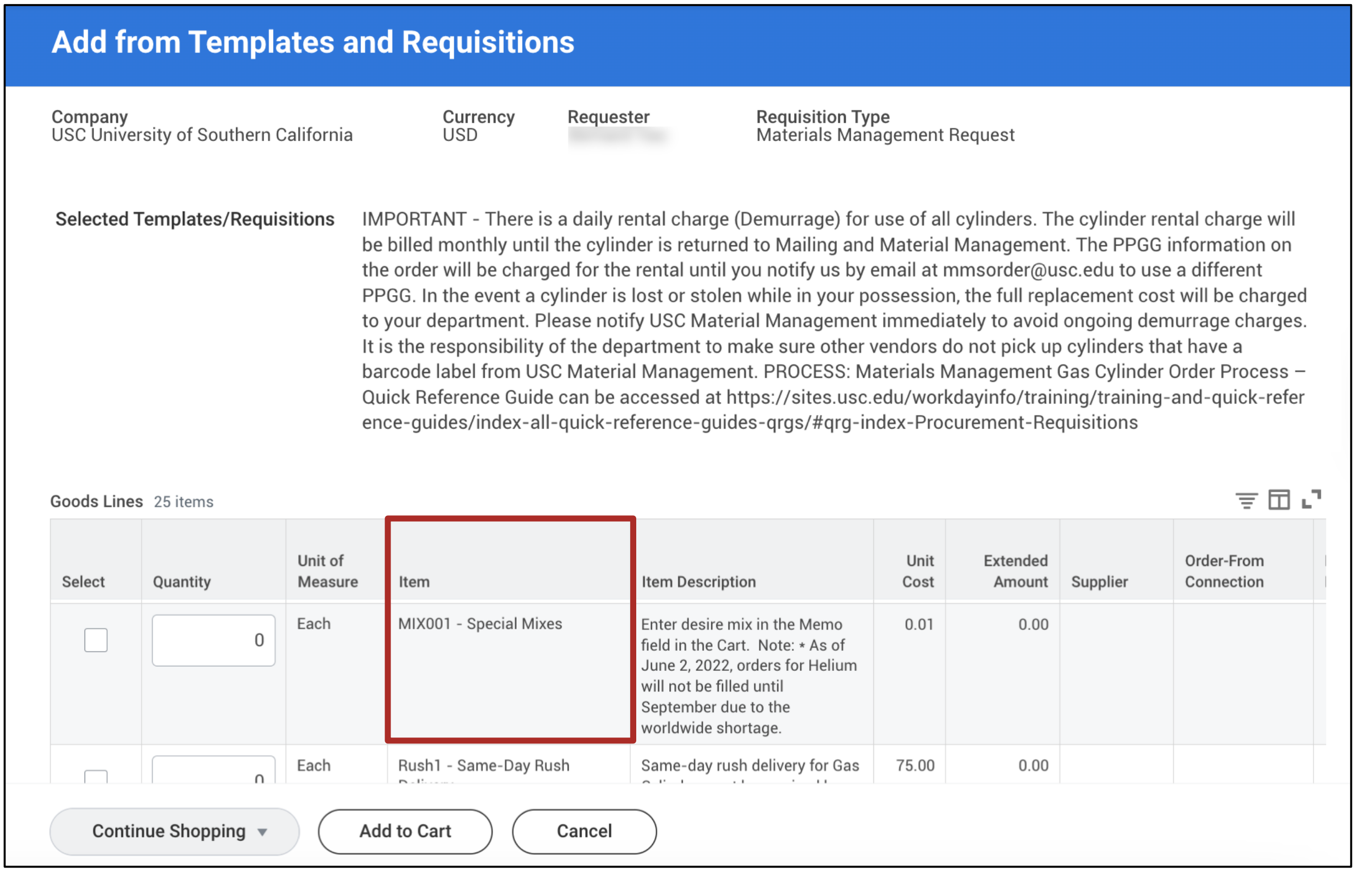


2. Select **View Items.**



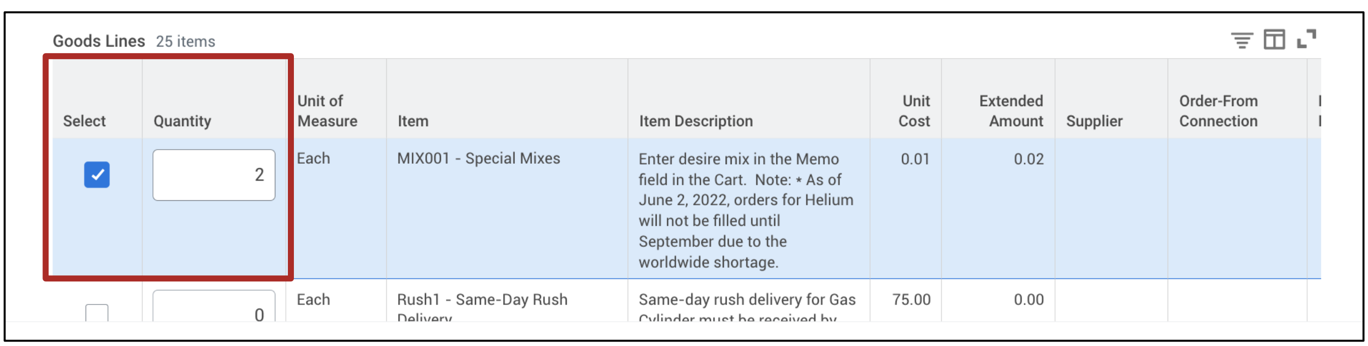
From the **Select Templates/Requisitions** screen:

3. In the Goods Lines section of the screen, scroll through the items listed until the **MIX001 – Special Mixes** item in the **Item** column is located.

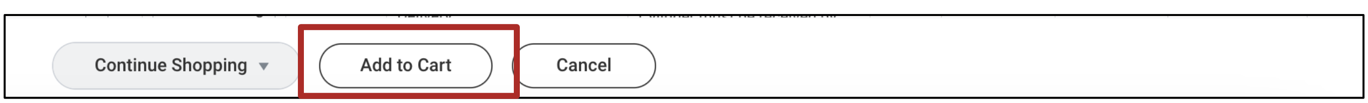


4. To order a **Special Mix,** select the **Quantity** field for that item

5. Enter the desired quantity. The system will auto select the **Select** checkbox in the **Select** column.

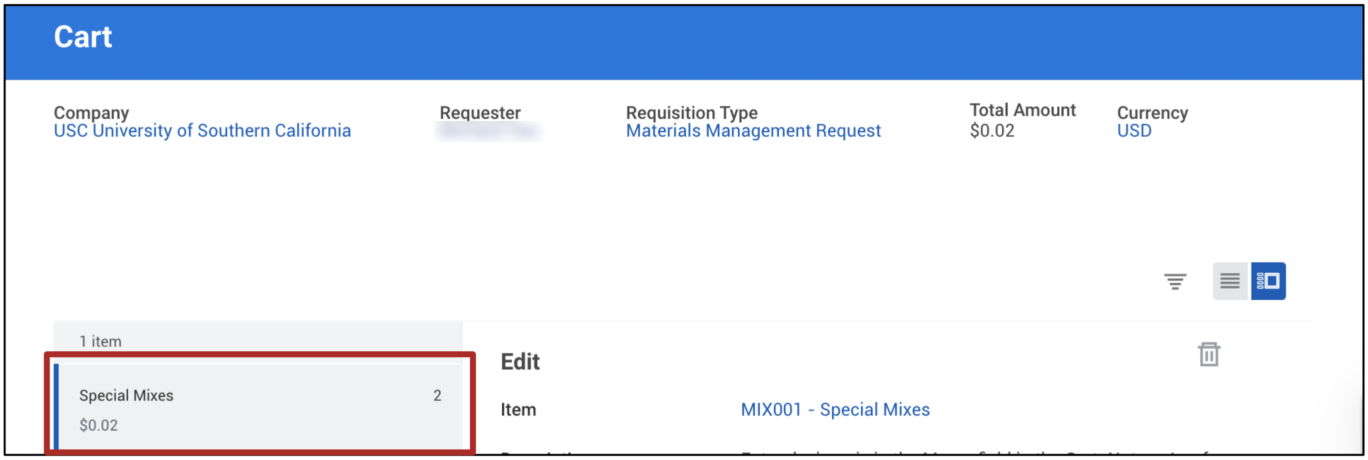


6. Select **Add to Cart.**

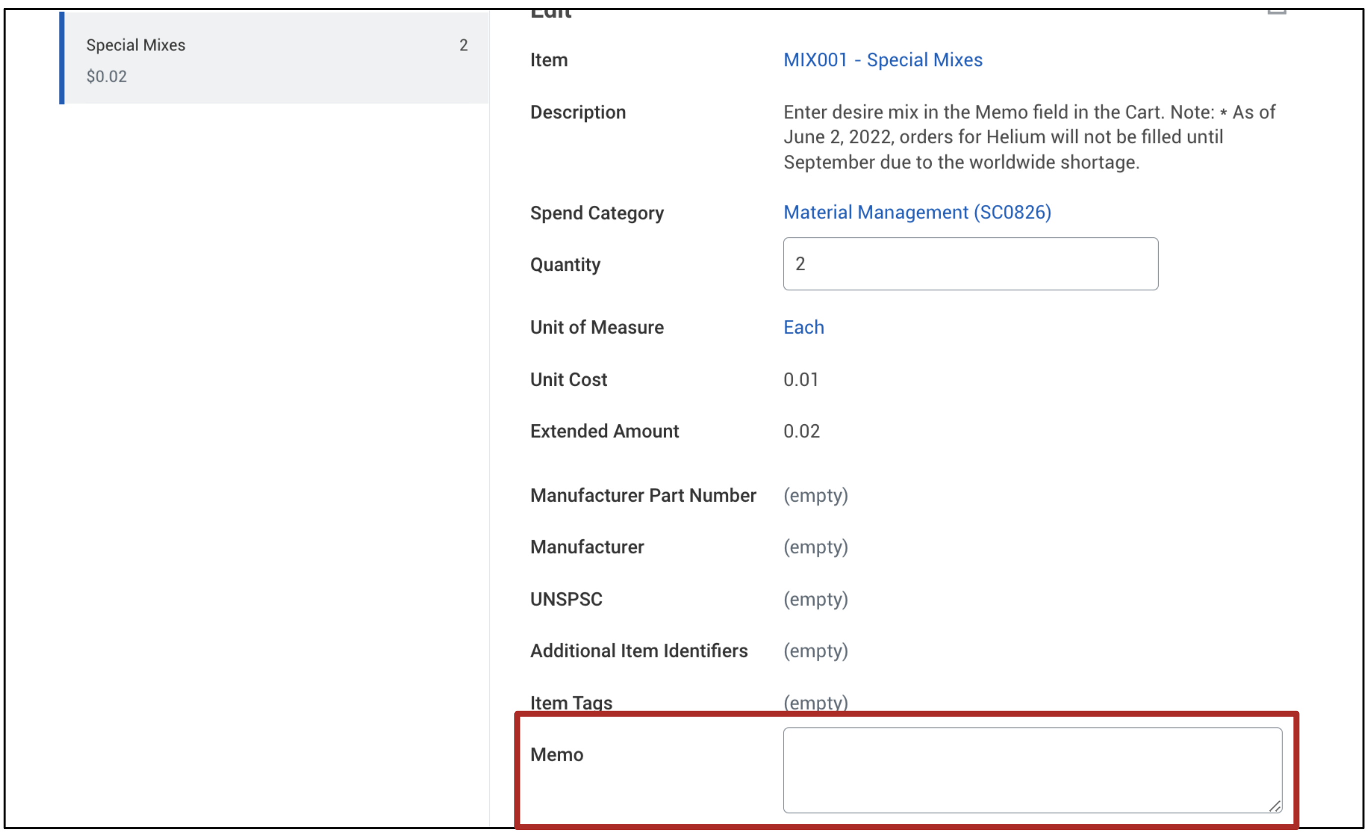


From the **Cart:**

7. Once the **Item(s)** have been added to the **Cart,** locate and select the **Special Mixes** line Item from the list of **Items** in the left-hand column.



8. Select the **Memo** field and enter the desired mix.



9. Select **Checkout** and complete the checkout process from **Step 17** of the **Creating the Requisition** section of this guide.

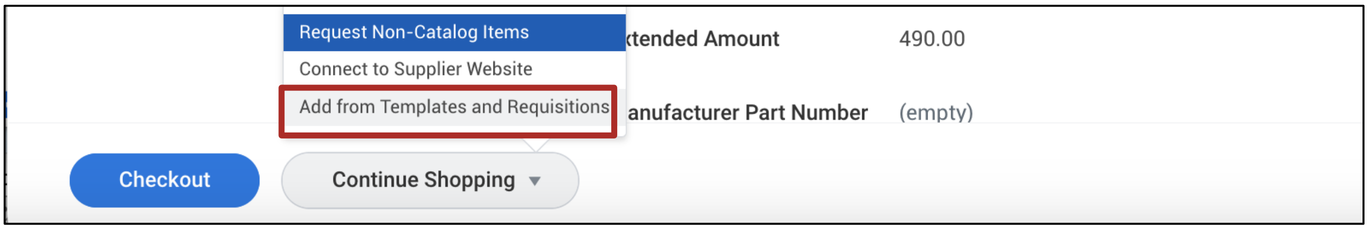
Adding a New Gas Cylinder Line Item from the Cart

This section demonstrates how to add a new line item from the **Cart.**

From the **Cart** screen:

1. Select **Continue Shopping.**

2. In the menu that displays, select **Add from Templates and Requisitions**.



From the **Add From Templates and Requisitions** screen:

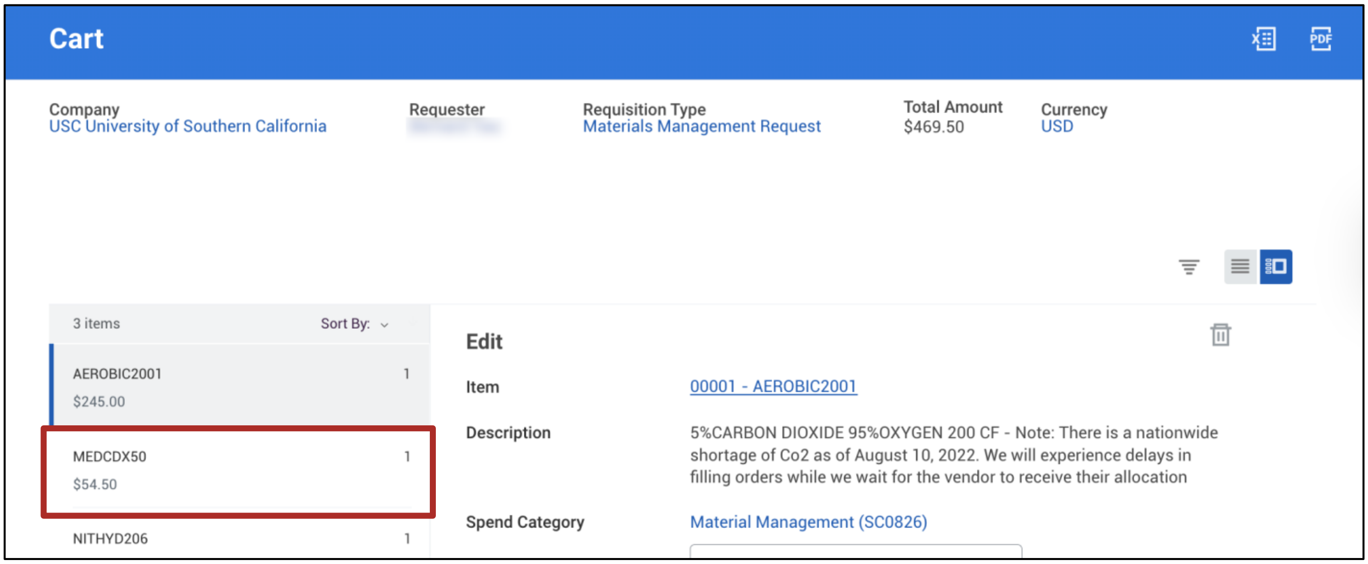
3. Continue from **Step 5** of the [**Creating the Requisition**] section of this guide.

Deleting a Gas Cylinder Line Item from the Cart

If a line item was added by error, you can remove that line item from the **Cart.**

From the **Cart** screen:

1. In the left-hand items column, select the line item to be removed from the **Cart.**



2. Select the **Trash** icon on the right-hand side of the screen. The line item will be removed from the **Cart.**

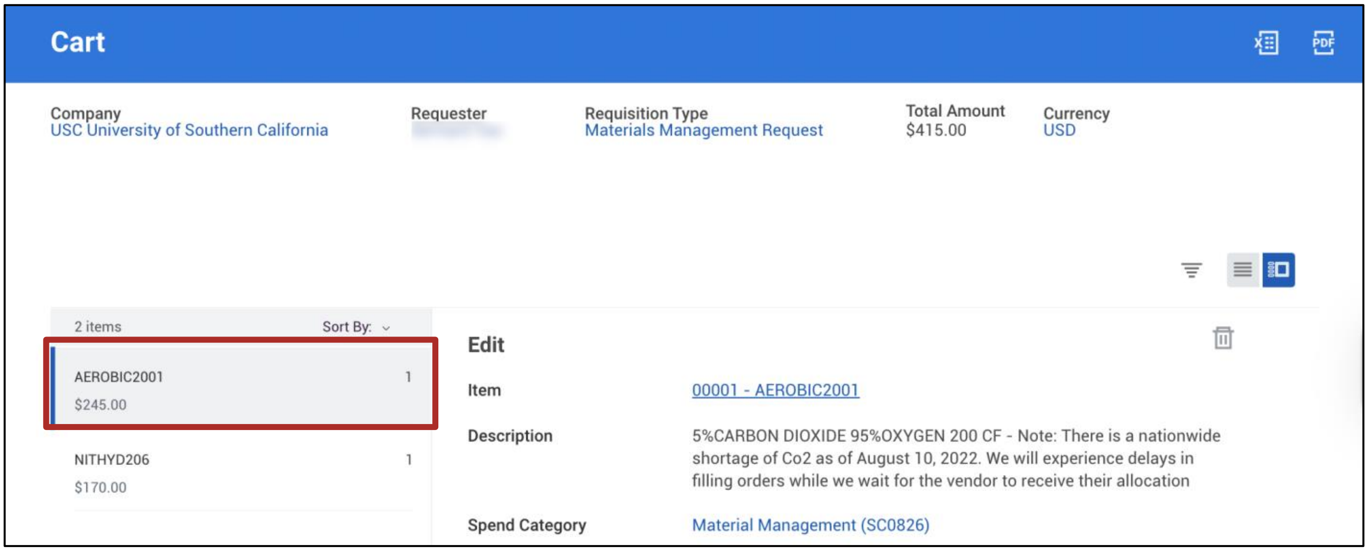
3. Select **Checkout** and complete the checkout process from **Step 17** of the **Creating the Requisition** section of this guide.

Updating the Quantity of Gas Cylinder Line Item from the Cart

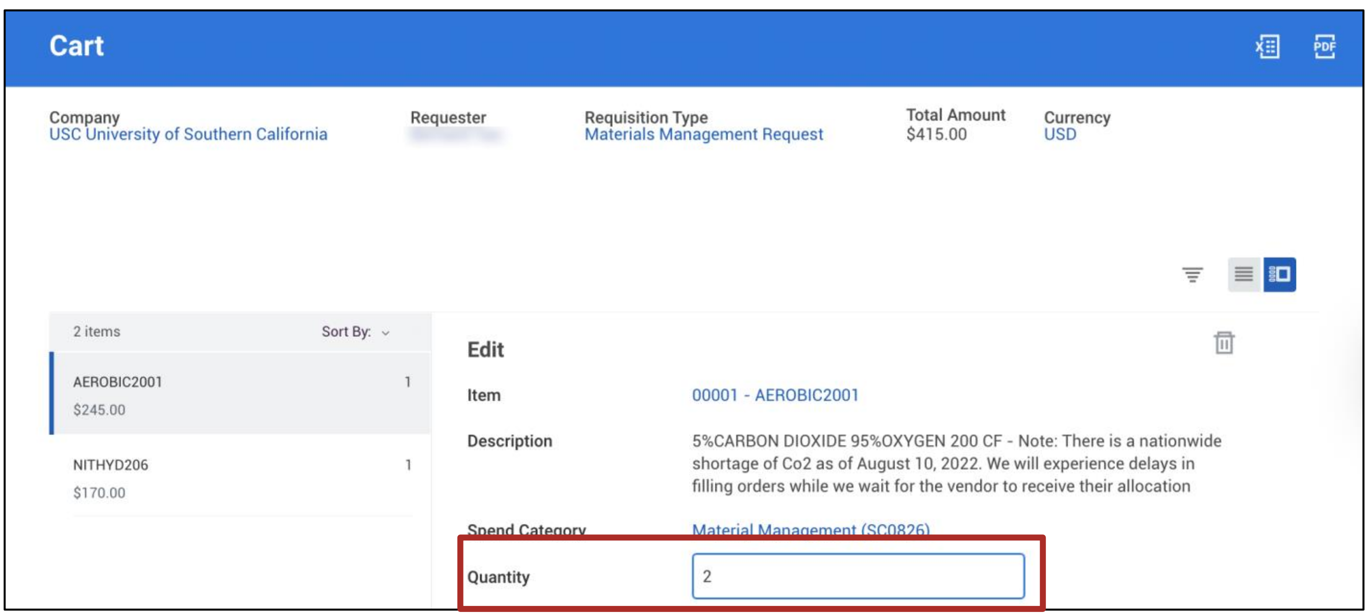
This section demonstrates how to change the quantity of an item in the **Cart.**

From the **Cart** screen:

1. In the left-hand items column, select the line item that you plan to update the **Quantity** on from the **Cart.**



2. In the **Quantity** field, enter in the number for the desired quantity.



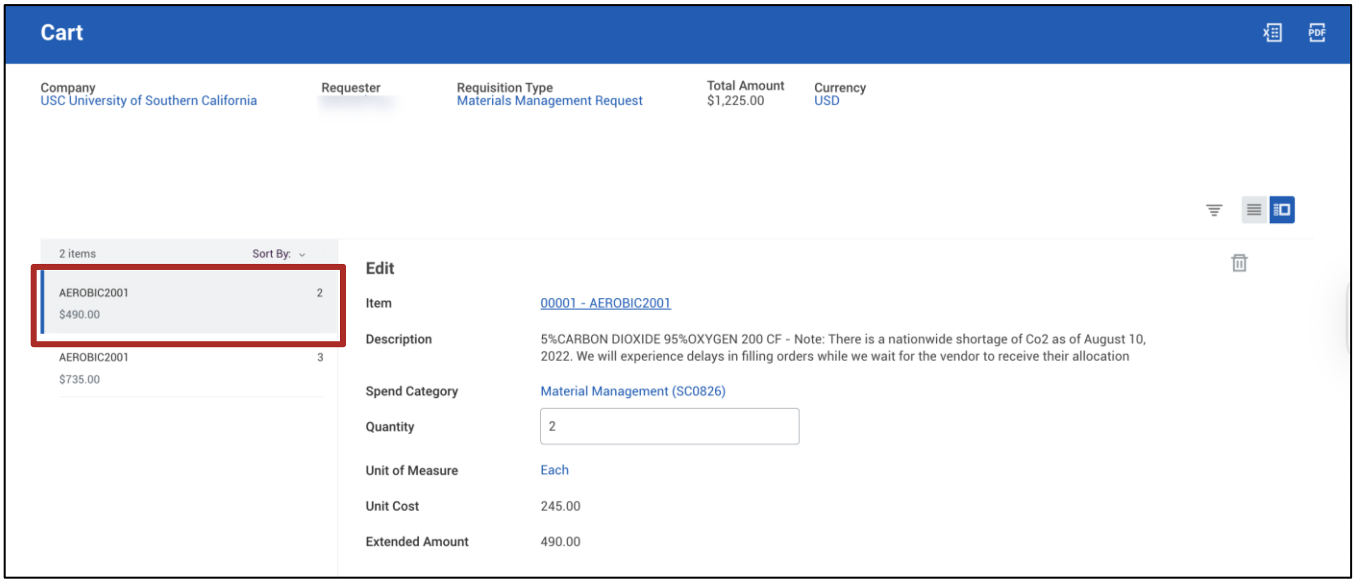
3. Select **Checkout** and complete the checkout process from **Step 17** of the **Creating the Requisition** section of this guide.

Updating the Memo of Gas Cylinder Line Item from the Cart

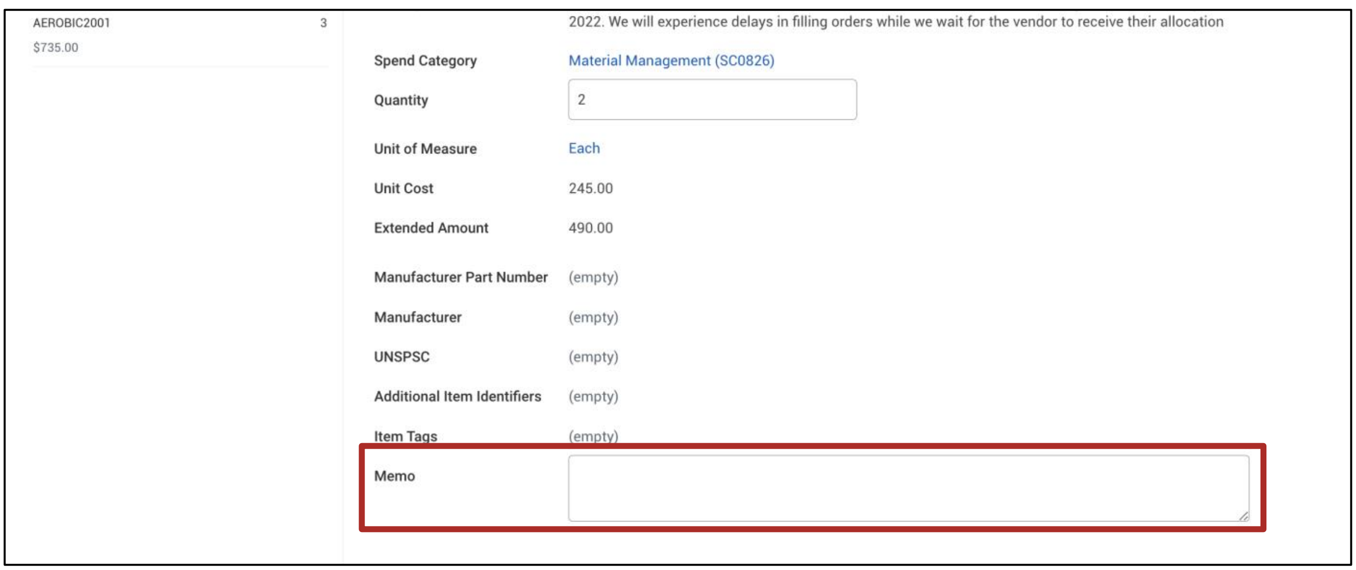
This section demonstrates how to change the memo for a line item in the **Cart.**

From the **Cart** screen:

1. In the left-hand items column, select the line item that you plan to update the **Quantity** on from the **Cart.**



2. In the **Memo** field, enter the necessary information for the respective line item.



3. Select **Checkout** and complete the checkout process from **Step 17** of the **Creating the Requisition** section of this guide.

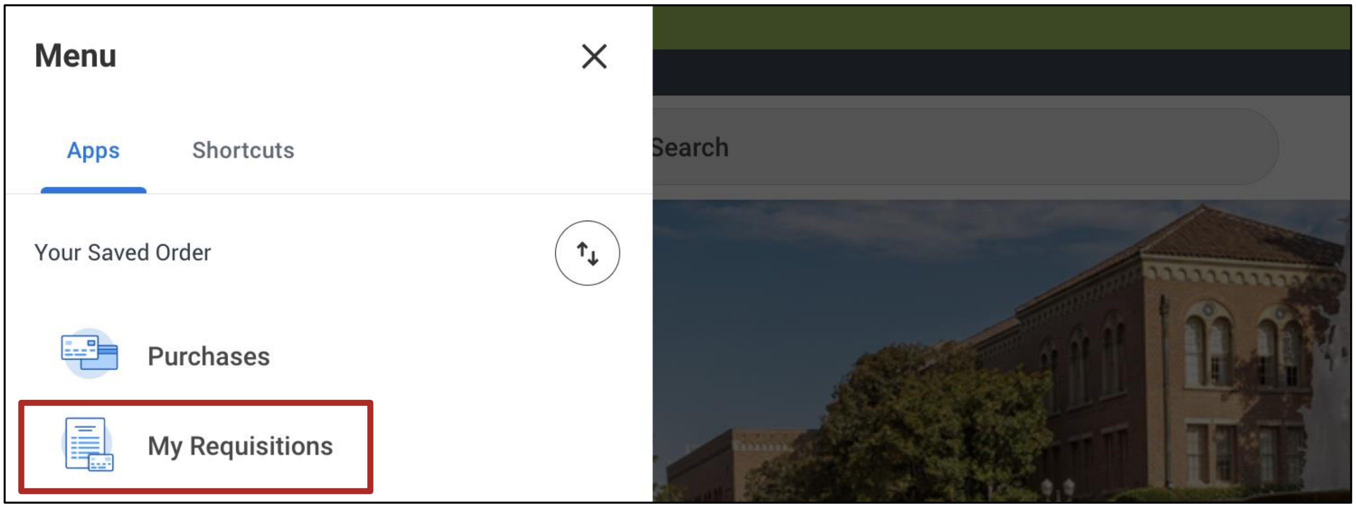
Editing a Requisition

This section demonstrates how to edit a requisition in **Draft** status.

From the Workday **Home** screen:

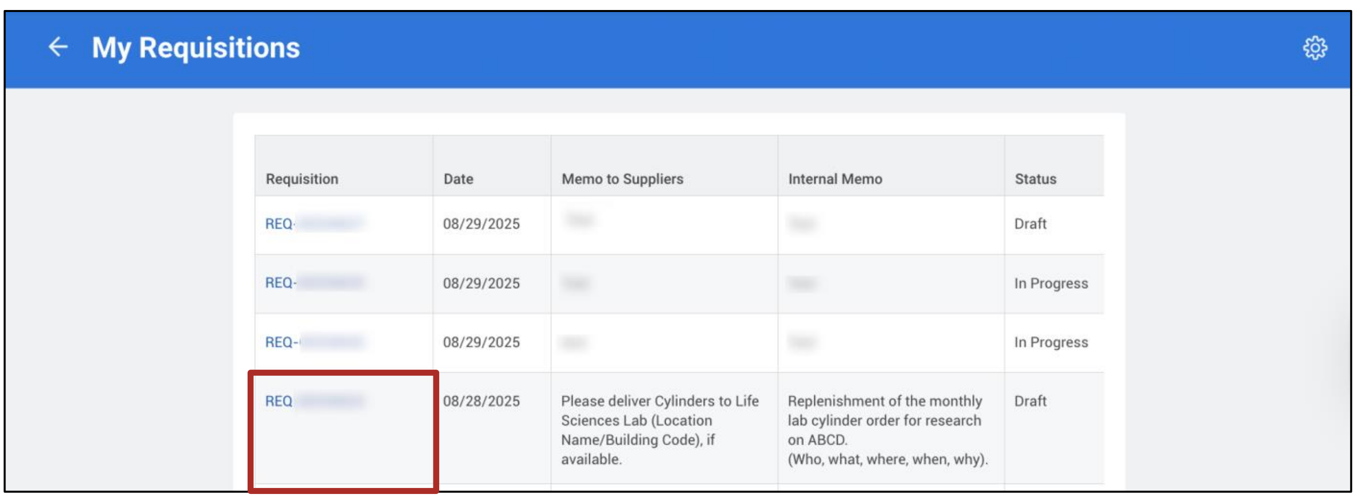
1. Select the **My Requisitions** worklet.

   Note: Refer to the **Add an App or Dashboard to Your Menu** tips and tricks guide for expanded instructions on adding and accessing apps if the **My Requisitions** app needs to be added to your Menu.

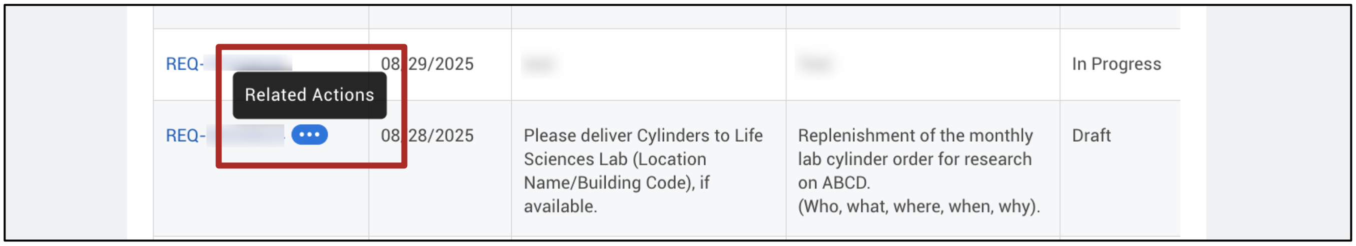


From the **My Requisitions** screen:

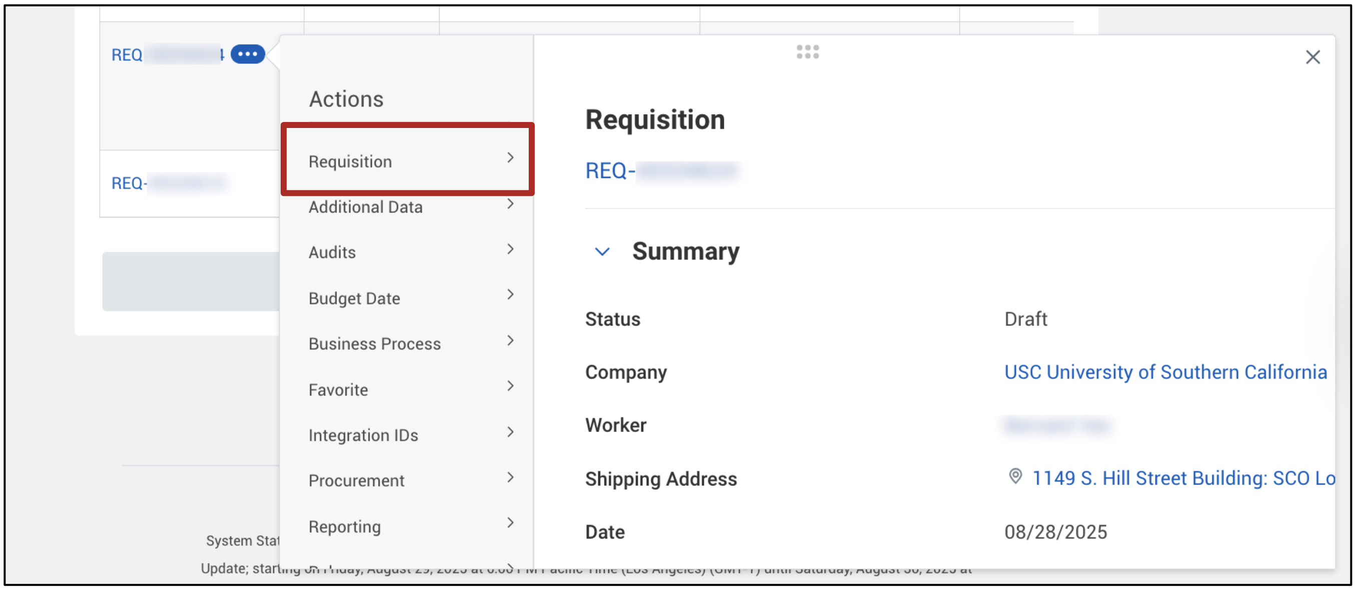
2. In the **Requisitions** column, find the requisition you wish to edit that is in **Draft** status.
3. Hover over the blue REQ hyperlink (REQ-XXXXXXXX) or select the tab key on your keyboard until the **Related Actions** button for the appropriate REQ displays.



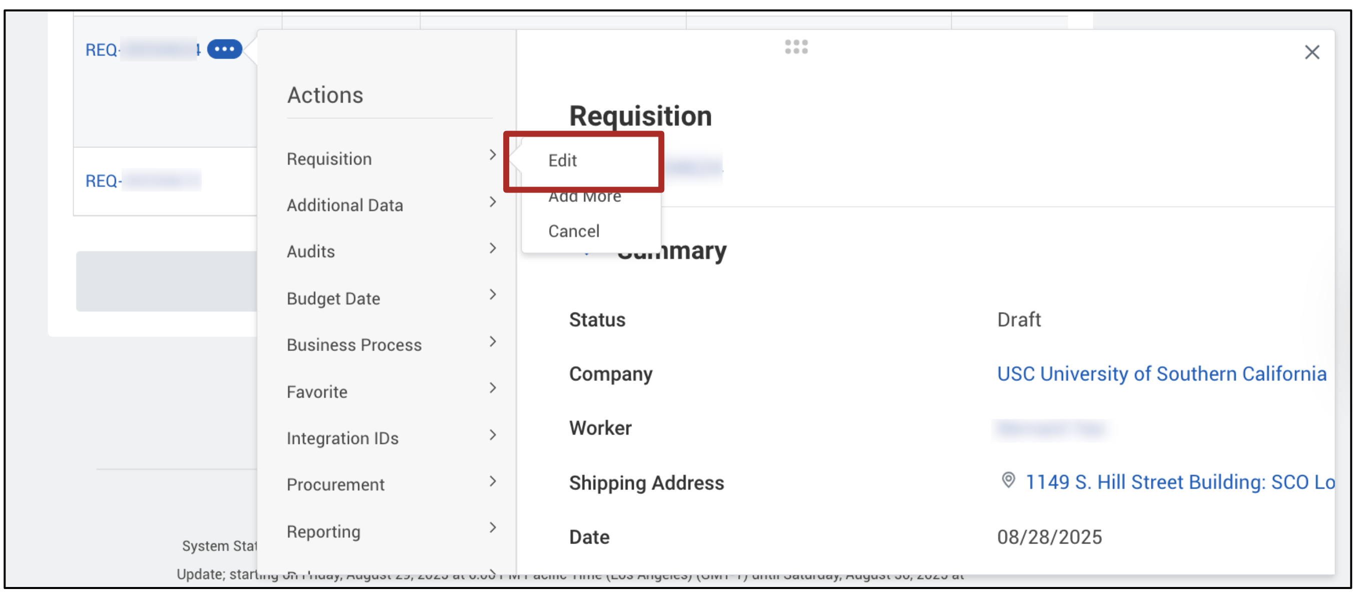
4. Select the **Related Actions** button when it appears.



5. In the left-hand **Actions** column, select **Requisition**.

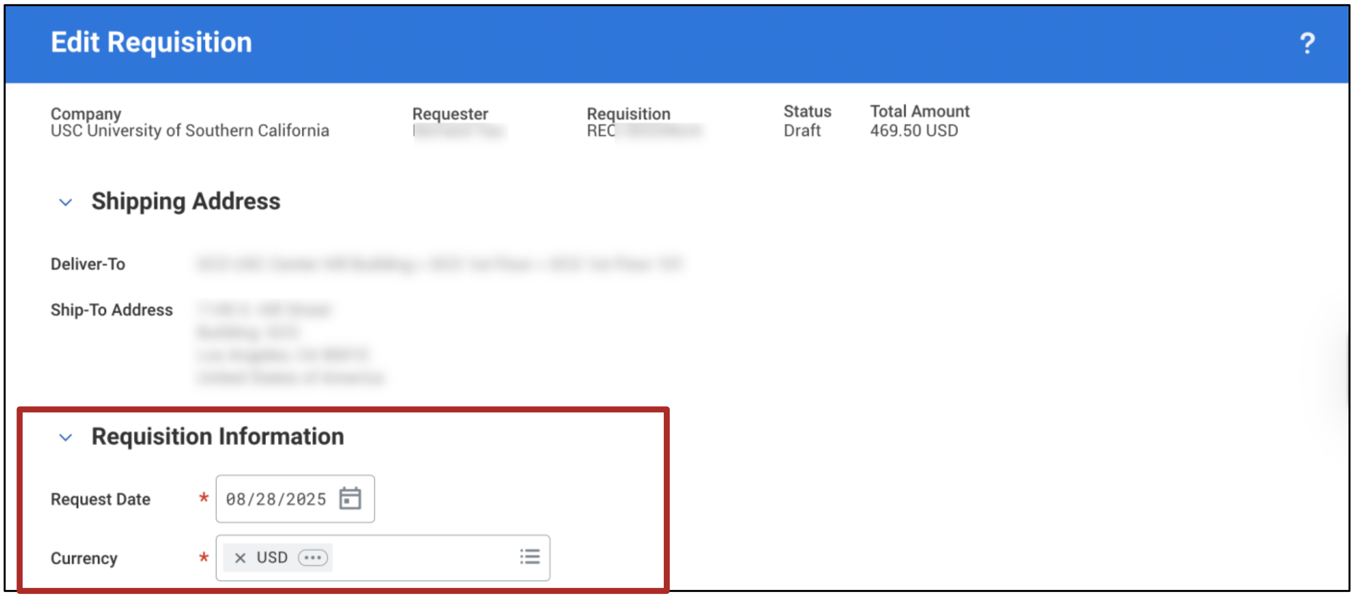


6. Select **Edit**.

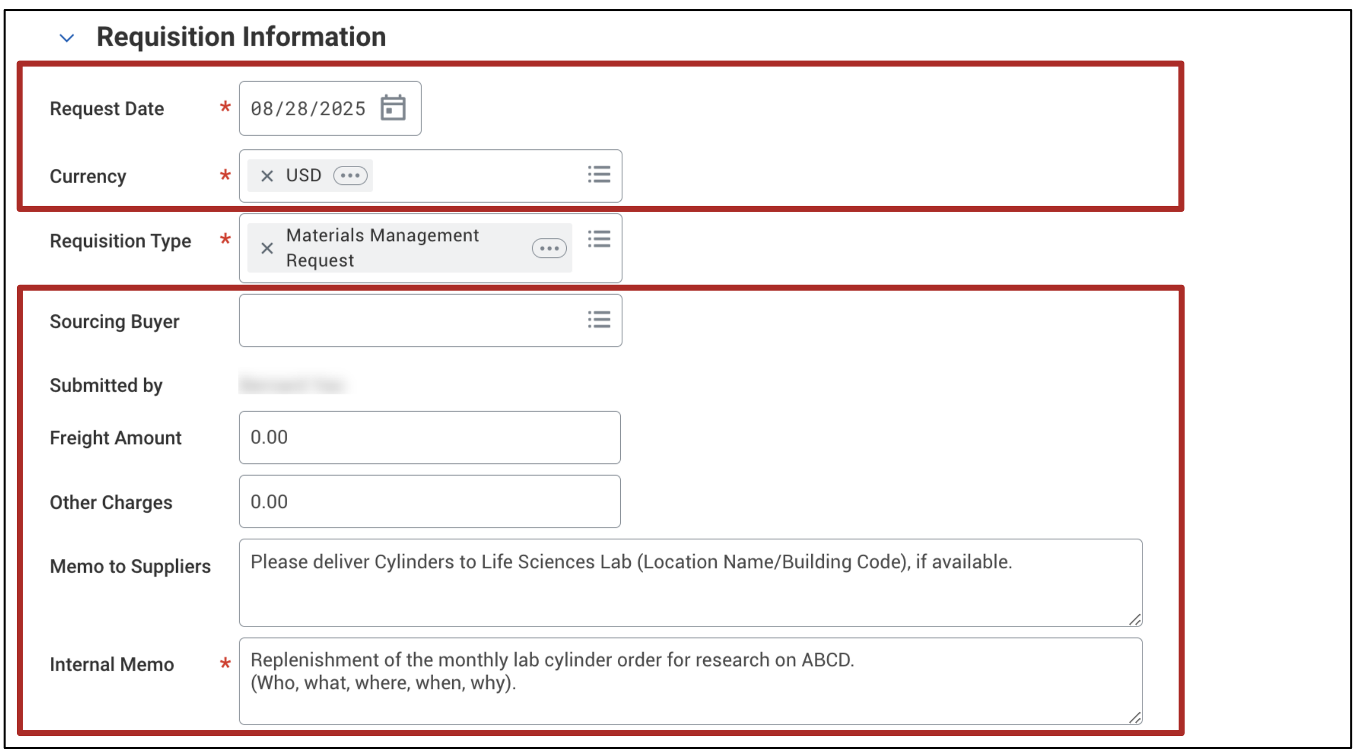


From the **Edit Requisition** screen:

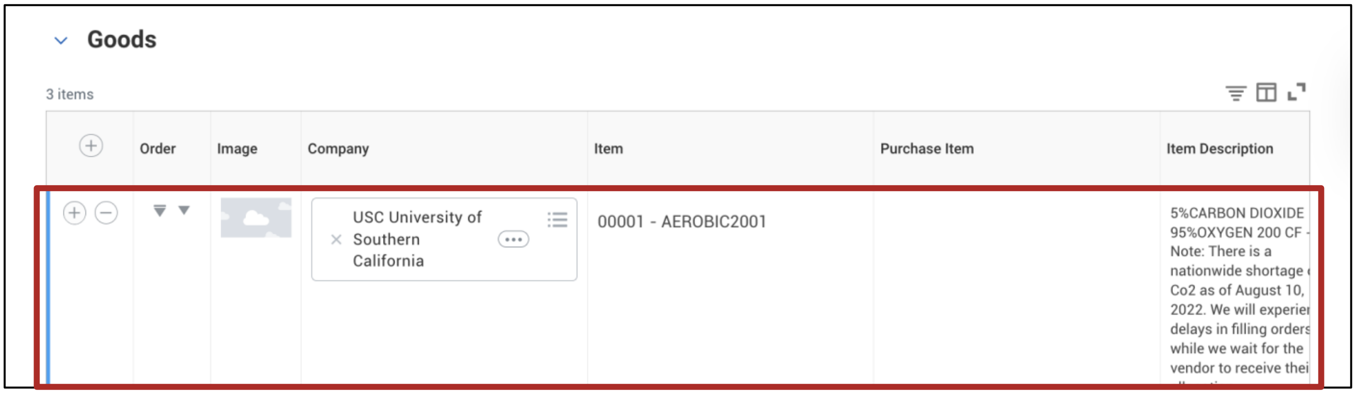
7. Navigate to the **Requisition Information** section.



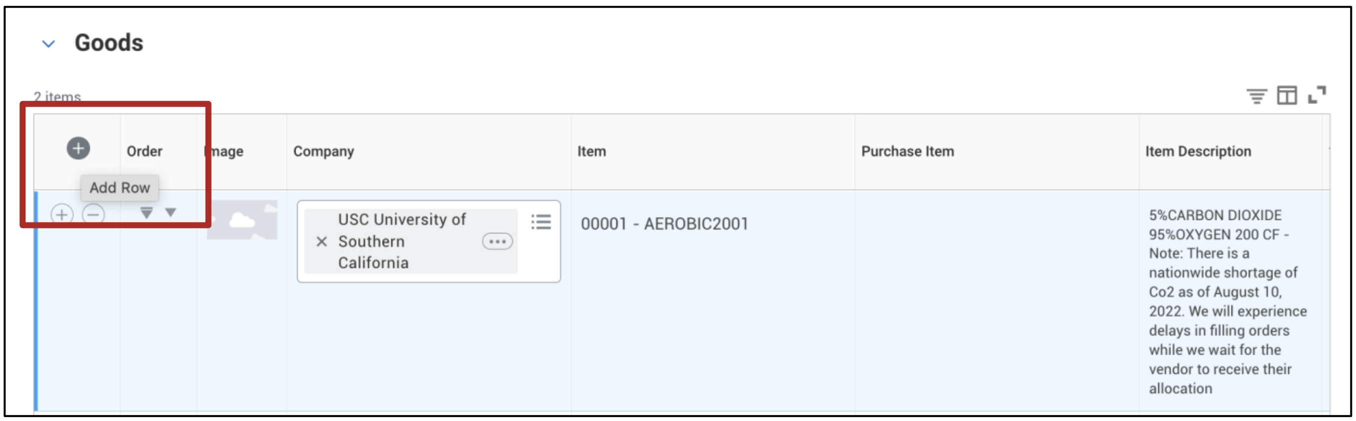
8. Update the fields in the requisition header as needed. **DO NOT** change the Requisition Type.



9. Navigate to the **Goods** section of the screen.
10. Update the line item fields as needed.

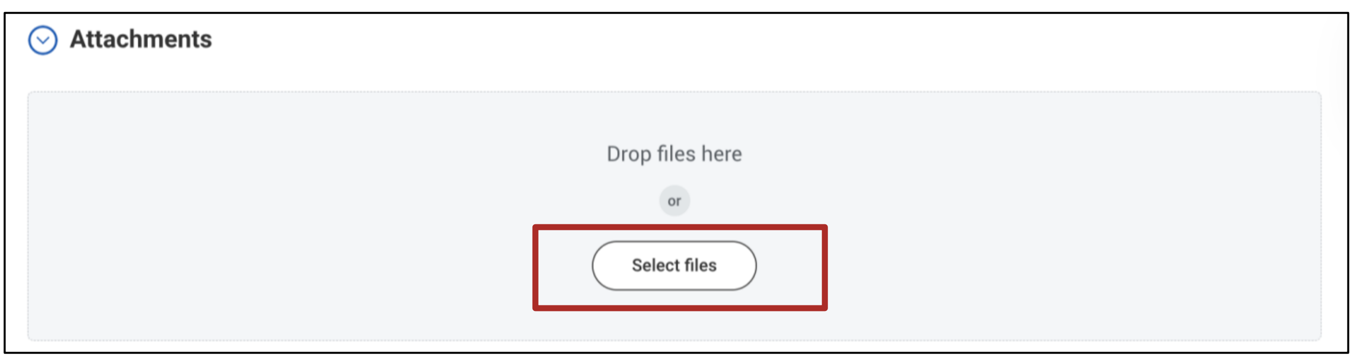


11. Select the **Add Row (+)** to add additional line items.

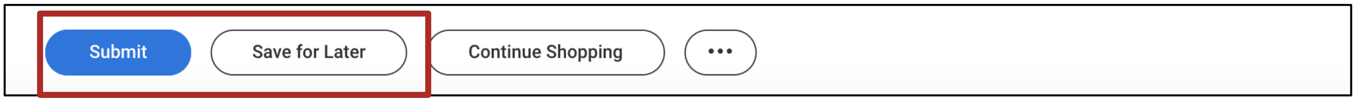


12. Scroll down to the **Attachments** and select the (**>**) arrow to expand the section.

13. Click **Select files** to upload attachments as needed.

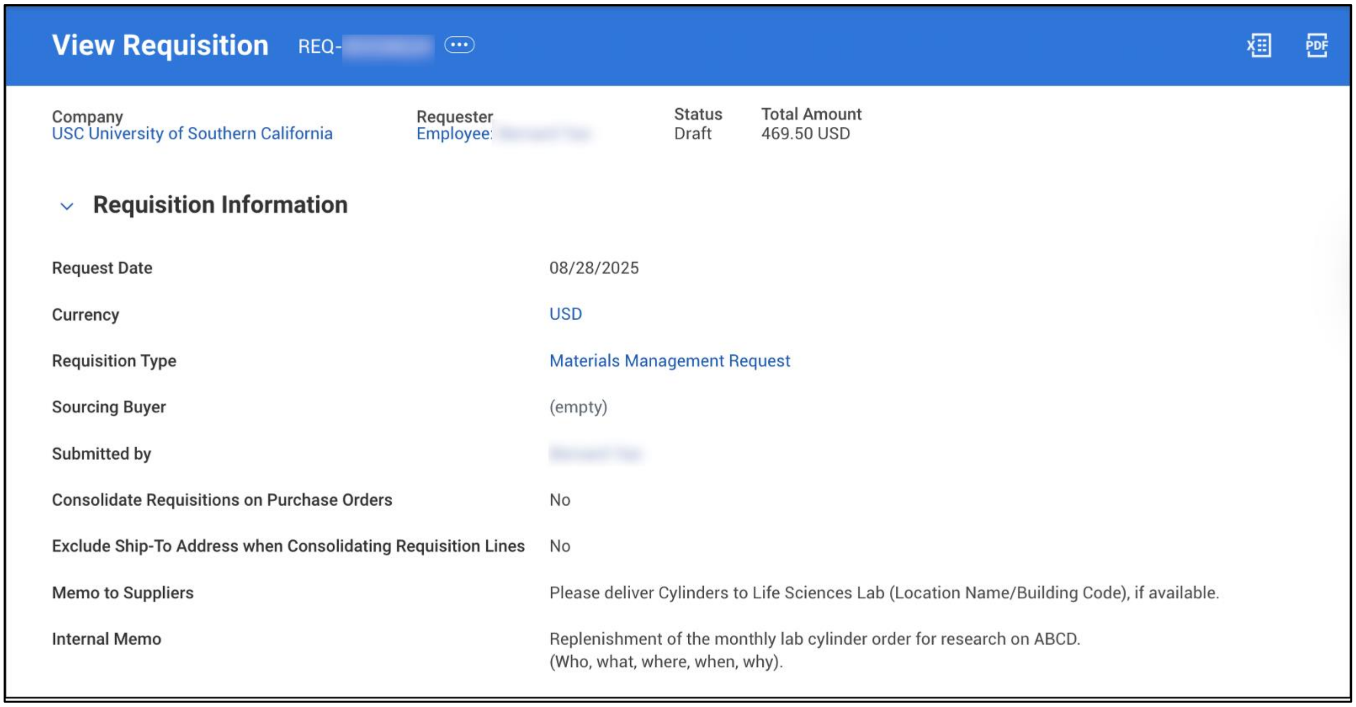


14. Select **Submit** or **Save for Later.**



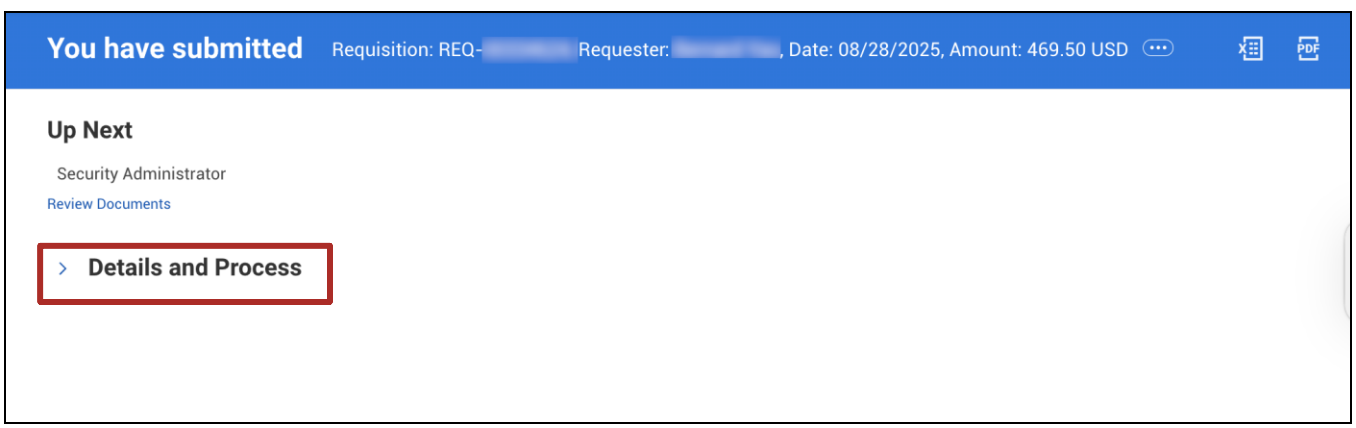
15. If you select **Save for Later**, you will be navigated to the View Requisition screen.

    Note: The requisition stays in **Draft** status.



16. If you select **Submit**, the requisition is submitted, and you will be navigated to the **You have Submitted** screen.

    Note: Select the **Details and Process** option to review the details of the submission.



You have successfully completed this task.