

Purchase Requisitioning: Create a Staples Purchase Requisition

This job aid supports requisitioners who may create a Staples requisition by requesting standard items from the supplier website via a punchout session (or adding special order, non-catalog items).

CREATE REQUISITION

From the homepage:

1. Enter 'Create Requisition' in the search bar.

The *Create Requisition* screen displays.

2. Select a **Requesting Entity** for your Staples ship-to account. If you are unaware of which requesting entity you should be using, you can email SupplyChainLocations@uams.edu.

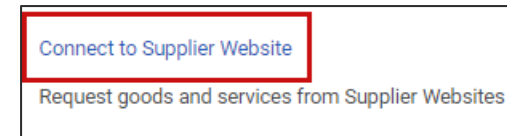
The screenshot shows the 'Create Requisition' form with the following fields and annotations:

- Requester:** * Erin Quimby
- Requesting Entity:** x UAMS | HEAD & NECK ONCOLOGY 934386. *Update your ship-to address using Requesting Entity*
- Company:** * x University of Arkansas for Medical Sciences
- Currency:** * x USD
- Requisition Type:** * x Standard
- Deliver-To:** * x UA System | All Institution Locations > UAMS > UAMS_CAMPUS - UAMS | HEAD & NECK ONCOLOGY 934386. *Deliver-To location will default in for you from the Requesting Entity*
- Ship-To:** * x 4110 OUTPATIENT CIR, WPRCI RM CI 7033 LITTLE ROCK, AR 72205 United States of America. *Do not click into this field to update the ship-to address!*

3. Select the appropriate **Requisition Type**. For Staples orders, this should be Standard.
4. Add your financial worktags – either Designated, Grant, Program, Project, or Cost Center. If using a Grant, select the Grant first. The assigned related worktags will default from the driver worktag chosen. Cost Center, Fund, and NACUBO Function are required on all transactions.
5. Click the **OK** button.

The *Create Requisition* screen displays.

6. Click the **Connect to Supplier Website** hyperlink.



The *Connect to Supplier Website* screen displays.

7. Click the **Connect** button to access the supplier's website.

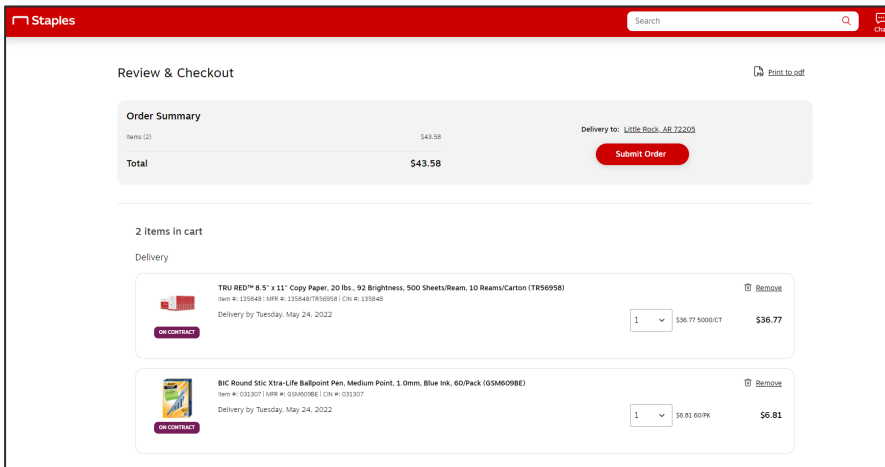


The supplier's website displays with available goods.

8. Select items to **Add to Cart**.

9. Once done shopping, click the Cart icon at the top of the page to review your cart.

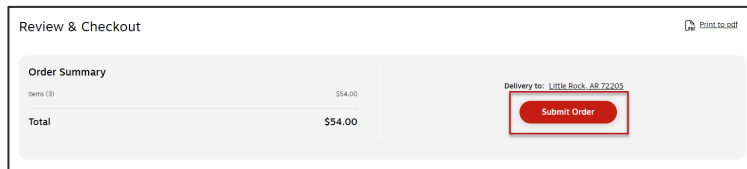
Once you have added all items to your cart, click Checkout to continue.



The *Cart* screen displays.

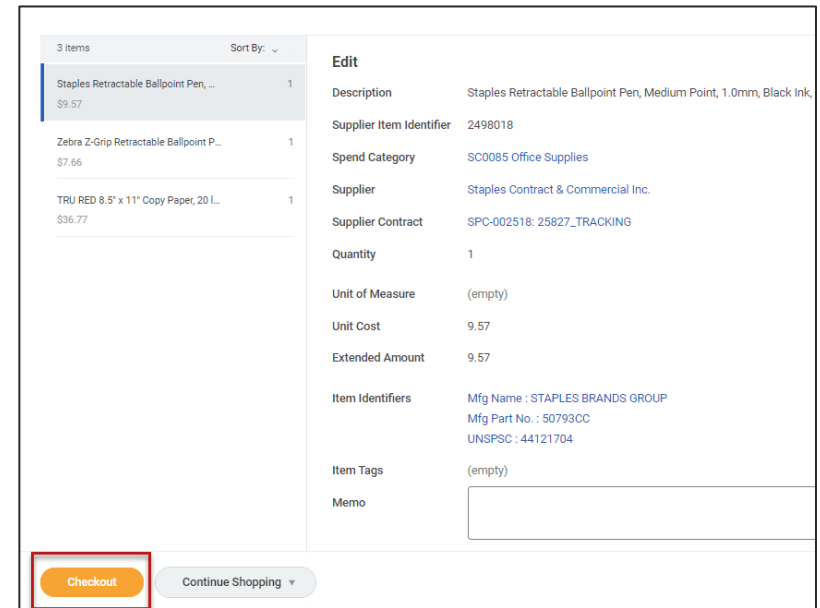
10. Review and confirm the order.

11. Click **Submit Order**.

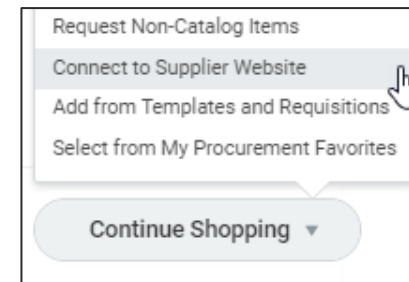


The *View Cart* screen displays as you return to Workday.

12. Click **Checkout**.



If you make it to the checkout screen and realize there are other Staples items you need to add to your order, you can connect back to the supplier website to add more items by choosing Continue Shopping at the bottom of the page.



COMPLETE CHECKOUT

The *Checkout* screen displays.

1. Enter **Request Date**. This will auto-populate with the current date.
2. Enter **Internal Memo** to provide notes to the Buyer or Cost Center approvers, if needed.
3. Review the **Goods** or the **Services** section, depending on the items included in the requisition.
4. Verify that the lines in each section are correct, editing as needed.



Note: UAMS requisitions will require an **Order-From Connection** on each line. Every UAMS Order-from connection should contain UAMS in the name. If adding items from a punchout, the Supplier Contract should default in for you.

5. If the Spend Category did not default in for you from your punchout item, select an appropriate spend category for that line. SC0085 is a common spend category for Staples supplies.

6. There are times where the unit of measure (UOM) will not default in for you for your punchout items. Dozen and Bundle are examples of UOMs that may not pull in from the punchout. If those are missing, please select the appropriate UOM.

7. Upload applicable attachments in the **Attachment** section.
8. Once all required or desired field have been completed, including adding all financial worktags on each line, click **Submit**.

At the top of the Checkout page, your requisition should have a Requesting Entity showing. If it does not, you will be unable to submit the requisition and be required to start over from the beginning of the Create Requisition task.

NEXT STEPS

The requisitioner's role is complete in creating a purchase requisition.

By clicking **Details and Process**, requisitioners can view the steps that have been completed. Any changes made to the purchase requisition are tracked in the **Process History** table.

An approver receives a Workday Inbox task to approve, deny or send back the purchase requisition. An approver must provide a reason if sending the requisition back.



Note: To add **Non-Catalog Items**, follow the steps on the Create a Purchase Requisition for Non-Catalog Items QRG.