FLORIDA TECH
FLORIDA'S **STEM** UNIVERSITY®

workday.

Purchase Requisition – Connect to Supplier Website

For Punchout Suppliers (Thermo Fisher, Grainger, Dell and Amazon)

Overview

Purchase Requisitions can be entered through Workday and will route through electronic approvals. Once all departmental and funding approvals are complete, it will route to the Purchasing Department for generation of the Purchase Order. Workday requires attachments for Purchase orders.

Initiation Process

1. Select the **Purchases** Application
   a. Can also use the top search bar and type "Create Requisition"
2. Select **Create Requisition**

3. Complete all the required fields (indicated with a red asterisk *) and all other applicable fields
   a. Requester – Defaults to initiator's name
   b. Company – Defaults to initiator's company, typically **Florida Institute of Technology, Inc.**
   c. Currency – Keep as USD
   d. Deliver-To – Defaults to initiator's workspace (if populated)
   e. Ship-To – Defaults to main campus address
   f. Cost Center, Fund, and Program – Defaults to initiator's worktags
      i. Can overwrite here if charging the whole Requisition to a single funding source or can overwrite later if multiple funding sources will be used
      ii. If the Cost Center is entered, the default Fund and Program will automatically populate
      iii. If a Grant, Gift, or Project are entered, the default Cost Center, Fund, and Program will automatically populate
   g. Location – Defaults to Main Campus Melbourne

4. Click **OK**

5. Click **Connect to Supplier Website**

6. On the same line as the Punchout Supplier you are ordering from, click **Connect**
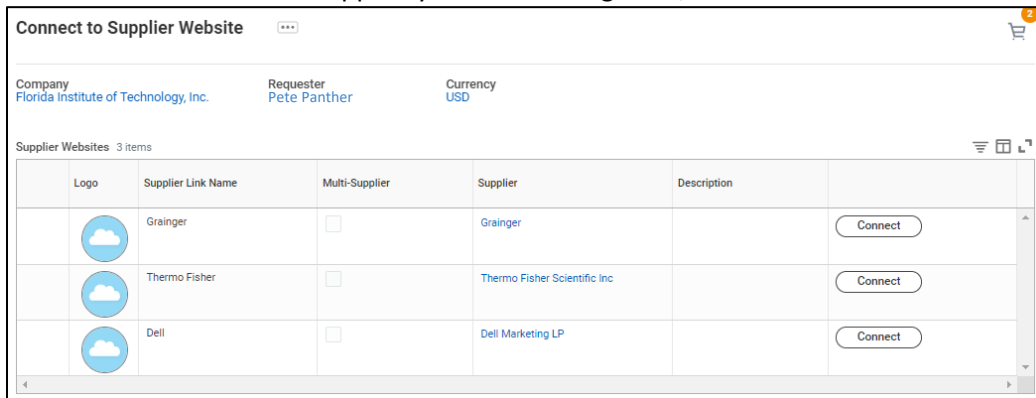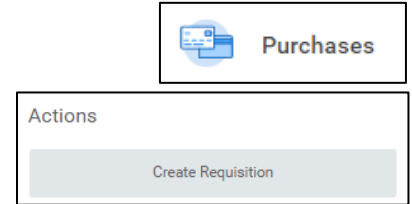
7. This will bring you directly to the Supplier's website, then shop on their website by adding items to your cart

NOTE: Before you leave the Supplier's website, print a copy of your order for use as an attachment in Step 12 below. Click **Print** then choose **Save as PDF** for the Destination, saving the copy of your order on your computer.

Print	3 pages
Destination	📄 Save as PDF ▼
Pages	All ▼
Layout	Portrait ▼
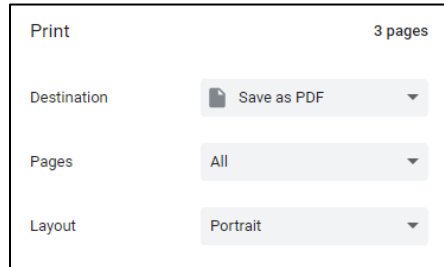
8. When you finish shopping, view your cart and click:
    a. Grainger – **Submit Cart**, then click **Yes**
    b. Thermo Fisher – **Return Cart to Purchasing Application**
    c. Dell – **Create Order Requisition**, then click **Continue Securely**, then click **Submit Order Requisition**

9. This brings your shopping cart from the Supplier website back into Workday, where you can complete your Purchase Requisition

10. Back in Workday, click **Checkout**

11. Review Goods line(s) with the information that was populated by the Supplier site
    a. Complete all the required fields (indicated with an asterisk *)

Cost Center	*Fund	Program	Location	Gift	Grant	Project	Additional Worktags	Splits
× CC11325 Administrative Applications	× FD100 General & Education Fund	× PG660 Institutional Support	× Florida Institute of Technology > Florida Tech Main Campus Melbourne					0

    i.   Spend Category – **Choose type of item from dropdown menu**, this drives the ledger account behind the scenes
    ii. Memo (to Supplier) – Optional, additional text field to record information for Supplier
    iii. Cost Center, Fund, Program – Defaults based on the header information, can be updated or split as needed
        a. To split the funding – Select the **0** button in the Splits column
        b. Can split by **Amount** or **Quantity**
        c. Click the Add button ⊕ to add lines
        d. Click **Done** when finished

Split by	Quantity ▼
2 items	
⊕	
⊖	Quantity
	5
⊖	Quantity
	5
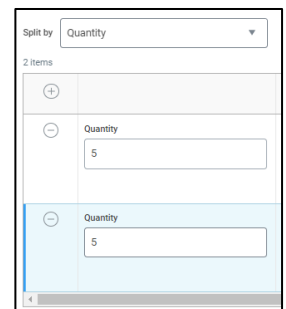
12. Add an Attachment – At least 1 attachment is required

13. Click **Submit**
    a. May **Save for Later**, this will save the request as a draft which you can access/edit in Purchases application > View > Requisitions

Approval Business Process

Approvers can Approve, Send Back (return for correction), or Deny (disapprove the request permanently)

1. Supervisory Organization Manager
2. Cost Center Budget Manager
3. Cost Center Manager
    a. If multiple cost centers, will go to all Managers
    b. If same as Supervisory Organization, does not require duplicate approval
4. Payroll (If a special spend category for payroll and not related to a cost center)
5. Accountant (If a special spend category for accountants and not related to a cost center)
6. Operational Accountant (If a special spend category for student accounting and not related to a cost center)
7. Project Manager (If funding source includes a Project worktag)
8. Grant Manager (If funding source includes a Grant worktag – Principal Investigator)
9. Grant Accountant (If funding source includes a Grant worktag – Office of Sponsored Programs)
10. Gift Manager (If funding source includes a Gift worktag)
11. Hierarchy Level 3 (If requisition > $15k)
12. Hierarchy Level 2 (If requisition > $50k)
13. Hierarchy Level 1 (If requisition > $100k)
14. Check Budget
    a. If budget is insufficient → Cost Center Manager to request an override if needed
    b. Budget Administrator to approve
15. Routes to Buyer in Purchasing for Approval & Sourcing

Next Steps

1. Purchasing will generate the Purchase Order
2. PO will be sent electronically to Supplier
3. Initiator can check My Requisitions Report at any time to see when a PO number has been issued
4. Once a PO has been issued and the Status shows as Approved and Goods/Services are received, initiator will need to Create Receipt to generate a payment to Supplier, follow the **Create Receipt Job Aid**