

How a PI Creates a Procurement and Payable Requisition for a Catalog Item

1. Log in to Workday using your **ID** and **Password**.
2. In the search bar shown below, type in **Create a Requisition** or **Create** ❶ and click enter.

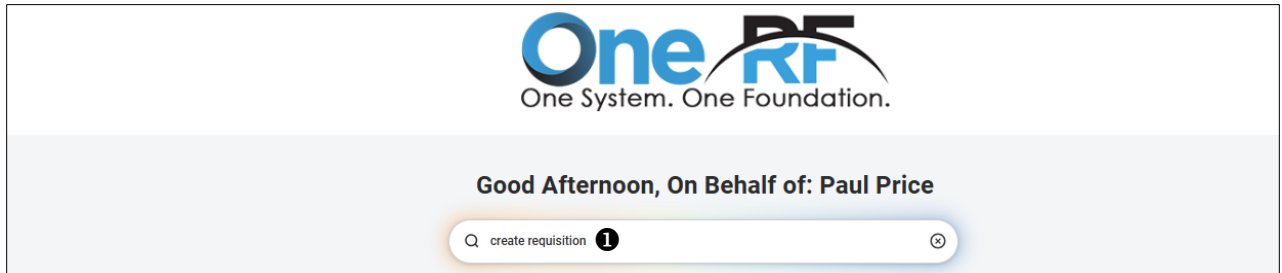
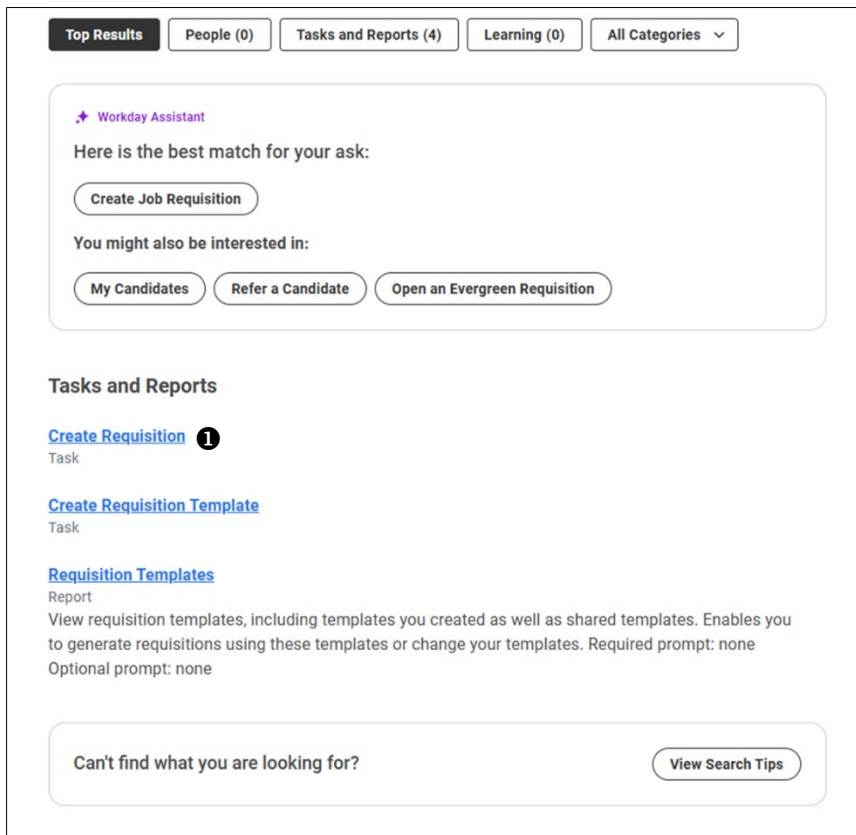


Figure 1

3. After you type and click the **Create Requisition** ❶ in Figure 1, the **Create Requisition** screen will appear as shown in Figure 2 below ❶. Click on **Create Requisition** ❶.



- After clicking on **Create Requisition** ❶ in **Figure 1**, on **Page 1**. The **Requisition Details** screen will appear as shown in **Figure 3** below. Click on **Continue Shopping** ❶. If this is greyed out, as shown **Figure 3** below, it indicates this is a first-time request for a requisition. Then, click **Edit Details** ❷, and the **Edit Requisition Details** screen will appear as shown below in **Figure 4**. The **Requisition Type Box** ❶ will be empty. Click on the drop-down menu ❷ will appear as shown in **Figure 3** and choose the expense category. We are choosing **Training Supplies** ❸.

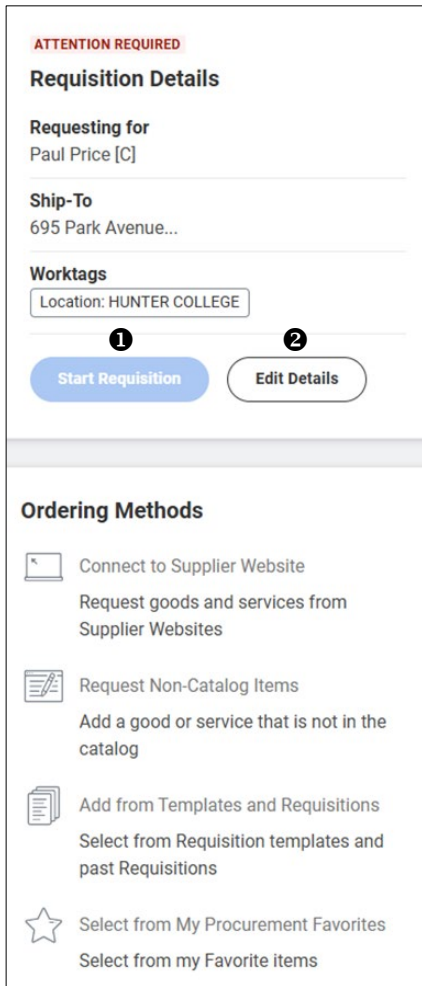


Figure 3

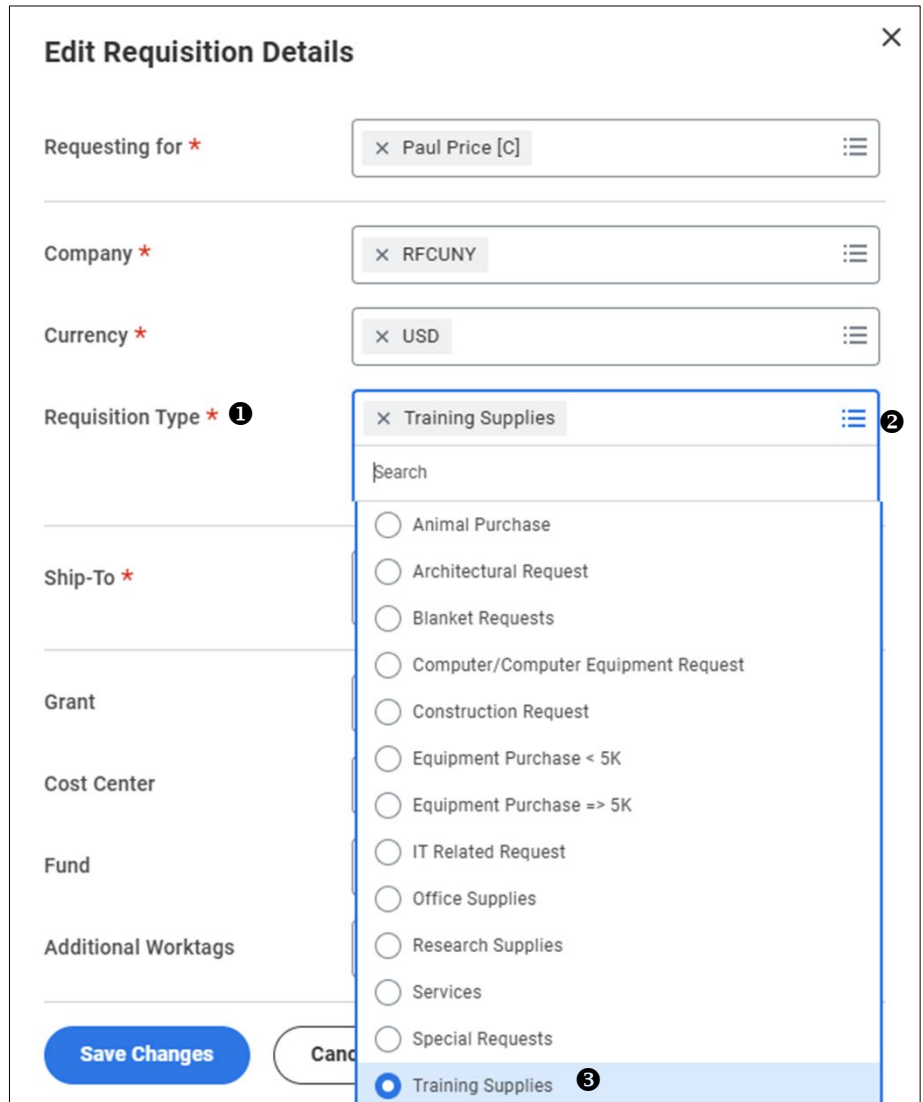


Figure 4

5. After clicking **Training Supplies** ③ on **Page 2, Figure 4**, the **Edit Requisition Details** screen will be filled out as shown in **Figure 5** below. There are three choices you can choose: **Save Changes**, **Cancel**, or **Reset to Default** ①. We will select **Save Changes** ②.

The screenshot shows the 'Edit Requisition Details' form with the following fields and values:

- Requesting for ***: Paul Price [C]
- Company ***: RFCUNY
- Currency ***: USD
- Requisition Type ***: Training Supplies (selected from a dropdown menu)
- Ship-To ***: 695 Park Avenue, New York, NY 10065, United States of America
- Grant**: (empty)
- Cost Center**: (empty)
- Fund**: (empty)
- Additional Worktags**: Location: HUNTER COLLEGE

At the bottom of the form, there are three buttons: **Save Changes** (labeled ②), **Cancel**, and **Reset to Default** (labeled ①). A bracket underlines these three buttons.

Figure 5

6. After clicking **Save Changes** ② in **Figure 5**, on **Page 3**, the **Requisition Details** screen will appear as shown in **Figure 6** below. We need to select **Connect to Supplier Website** ①.

Requisition Details

Requesting for
Paul Price [C]

Company
RFCUNY

Currency
USD (\$)


Requisition Type
Training Supplies


Ship-To
695 Park Avenue...


Worktags
Location: HUNTER COLLEGE

[Start Requisition](#) [Edit Details](#)

Ordering Methods

 [Connect to Supplier Website](#) ①
Request goods and services from Supplier Websites

 [Request Non-Catalog Items](#)
Add a good or service that is not in the catalog

 [Add from Templates and Requisitions](#)
Select from Requisition templates and past Requisitions


 [Select from My Procurement Favorites](#)
Select from my Favorite items

Figure 6

7. After clicking **Connect to Supplier Website** ❶ in Figure 6, on Page 4, the **Connect to Supplier Website** screen appears as shown below in Figure 7.

Click **Connect** ❶.

Connect to Supplier Website

Company: RFCUNY Research Foundation of the City University of New York
Requester: Paul Price [C]
Currency: USD
Requisition Type: Training Supplies

Supplier Websites 1 item

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	Connect
	Jaggaer - Punchout	<input checked="" type="checkbox"/>			Connect ❶

Continue Shopping | Cancel

Figure 7

8. After Clicking on **Connect 1** in **Figure 7**, on **Page 5**, the **Shopping Home Screen** will appear as shown below in **Figure 8**. In the upper right corner of the screen there are three tabs which are **Shopping Home 1**, **Supplier Management 2** and **Supplier Requester DB 3**. The **Shopping Home 1**. This is where one can view their **Organizational Message 4**, **My Draft Carts 5**, **My Purchase Orders 6** and the **Showcase of Catalog Suppliers** you can order from **7**. Next tab is **Supplier Management 2**. This is where one can view the **Supplier Requests Approved**, **Supplier Request Under Review**, **Stipend Recipients**, **Suppliers Pending Registration Approval**, **Supplier Change Review Approval**, **Supplier Search**, and **Search Results**. The final tab is **Supplier Requester DB 3**. This is where one can view the **Stipend Vendors**, **My Supplier Requests**, **Quick Links**, and **Supplier Search**.

To order from your supplier choose your Catalog **7** in the **Showcase**.

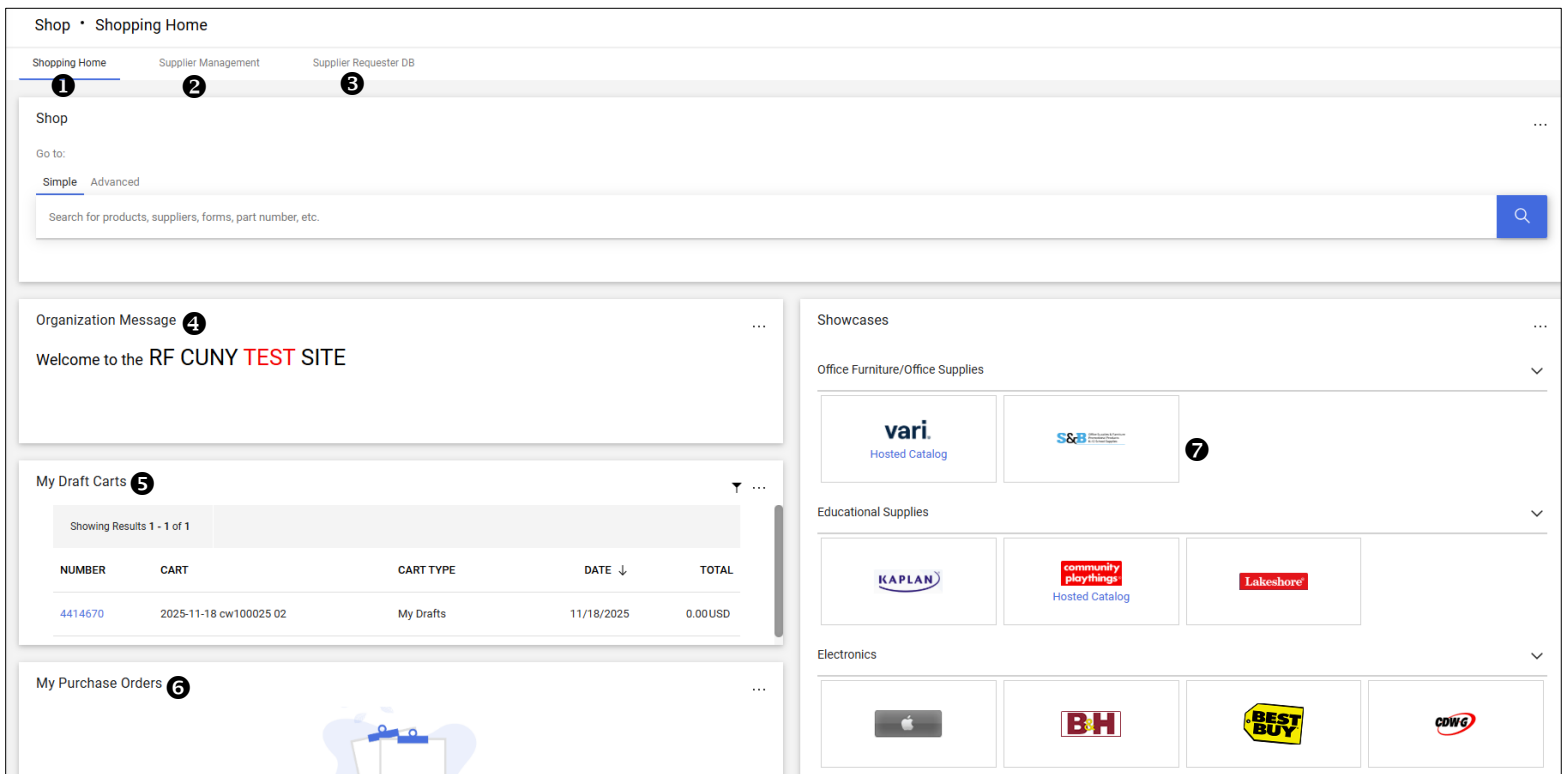


Figure 8

9. After choosing your **Catalog ⑦** in **Figure 8**, on **Page 6**, you may access the supplier's offering of products, or you may be prompted for a delivery zip code. This supplier is requesting a **Delivery Zip Code** as shown in **Figure 9** below. Enter your **Zip Code ①** and click **Continue ②**. After clicking **Continue ②** the **Catalog ⑦** that was chosen in **Figure 8**, on **Page 6**, will open.

Delivery ZIP code

Please enter the ZIP Code of your delivery location so we can provide accurate product availability.


For international orders, please enter '00000'.

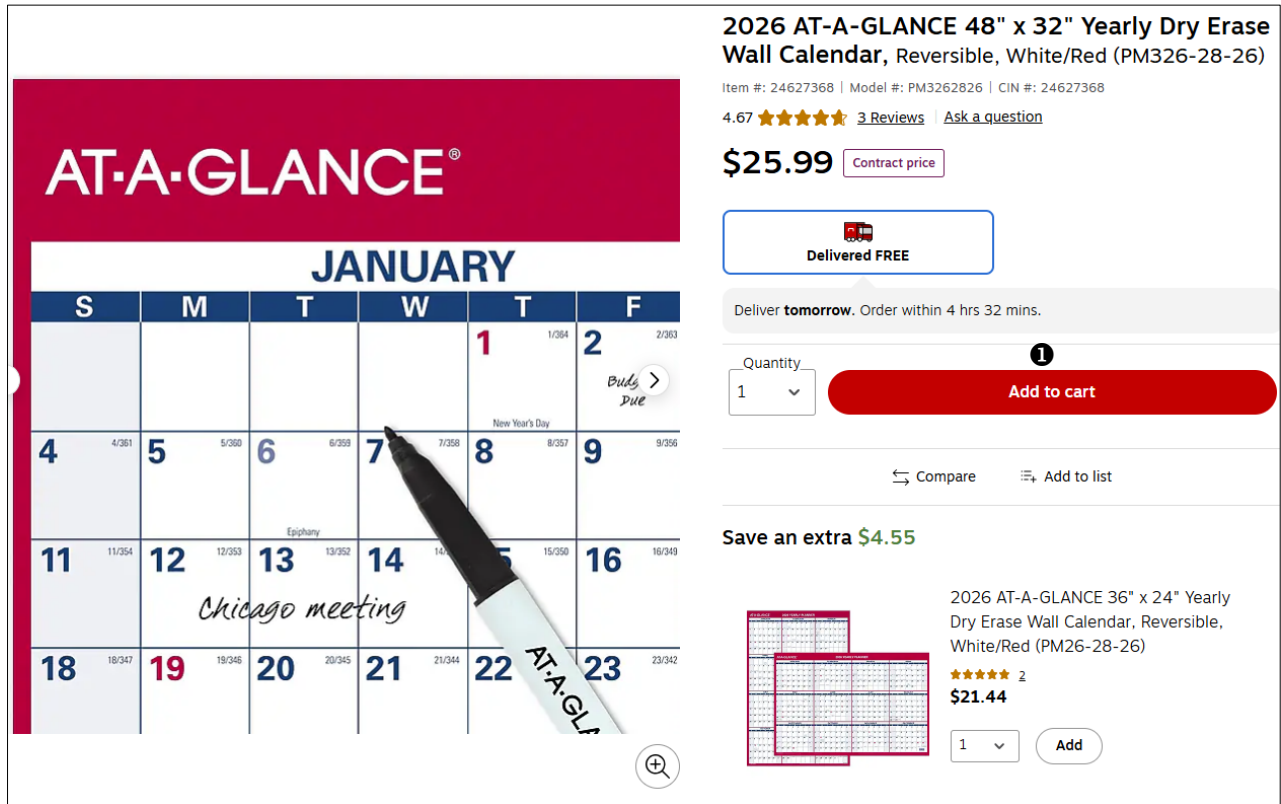
ZIP code _____
Enter 5 digit ZIP code ①

Continue ②

Please note the estimations provided are based off the ZIP code entered, the SKU searched, and the day and time. Our inventories are constantly changing so if any of these variables change then the estimates may no longer be accurate.


Figure 9

- Choose your item from the catalog and click **Add to Cart** . And follow the prompts from the catalog. (This is just like Amazon ordering).




2026 AT-A-GLANCE 48" x 32" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM326-28-26)


Item #: 24627368 | Model #: PM3262826 | CIN #: 24627368


4.67  [3 Reviews](#) | [Ask a question](#)

\$25.99 Contract price

 **Delivered FREE**


Deliver **tomorrow**. Order within 4 hrs 32 mins.


Quantity: 

Add to cart 

[Compare](#) [Add to list](#)

Save an extra \$4.55

 2026 AT-A-GLANCE 36" x 24" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM26-28-26)

 [2](#)

\$21.44




Figure 10

11. After you click submit in the catalog the Shipping Cart screen will appear as shown in **Figure 11** below. Next click **Submit to Workday** ❶.

The screenshot shows a 'Shopping Cart' page with the following elements:

- Header:** Shopping Cart • 4420132. Buttons for 'Assign Cart' and 'Submit To Workday' (marked with ❶).
- Navigation:** Go to: Non-Catalog Form | Favorites | Forms | Shop | Quick Order. Browse: Suppliers | Categories | Contracts.
- Search:** Search for products, suppliers, forms, part number, etc.
- Item List:** 1 Item. S & B COMPUTER AND OFFICE PRODUCTS INC · 1 Item · 25.99 USD.
- Supplier Details:** Need to make changes? MODIFY ITEMS | VIEW ITEMS. Item(s) was retrieved on: 11/25/2025 12:33:50 PM. 2026 AT-A-GLANCE 48" x 32" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM326-28-26).
- Table:**

Line	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	2026 AT-A-GLANCE 48" x 32" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM326-28-26)	24627368	EA	25.99	Qty: 1 EA	25.99
- Summary Panel (Right):**
 - Total (25.99 USD):** Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
 - Subtotal: 25.99
 - Tax1: 0.00
 - Tax2: 0.00
 - Total: 25.99**

Figure 11

12. After clicking **Submit to Workday** ❶, in **Figure 11** above the **Workday View Cart** ❶ Screen will appear as shown in **Figure 12** below. Review and click **Checkout** ❶.

The screenshot shows a 'View Cart' page with the following elements:

- Header:** View Cart. Buttons for 'Checkout' (marked with ❶) and 'Continue Shopping'.
- Company Info:** RFCUNY Research Foundation of the City University of New York. Requester: Paul Price [C]. Requisition Type: Training Supplies. Total Amount: \$25.99. Currency: USD.
- Item List:** 1 Item. 2026 AT-A-GLANCE 48" x 32" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM326-28-26) \$25.99.
- Edit Panel:**
 - Description:** 2026 AT-A-GLANCE 48" x 32" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM326-28-26)
 - Supplier Item Identifier:** 24627368
 - Spend Category:** (empty)
 - Supplier:** S & B COMPUTER AND OFFICE PRODUCTS INC
 - Supplier Contract:** (empty)
 - Quantity:** 1
 - Unit of Measure:** Each
 - Unit Cost:** 25.99
 - Extended Amount:** 25.99
 - Item Identifiers:** Manufacturer Part Number : PM3262826
 - Memo:** [Empty text box]

Figure 12

13. After clicking **Checkout ①** on **Page 9, Figure 12**, the **Requisition Screen** will appear as shown in **Figure 13** below. We will show this screen in three parts over pages 10, 11, and 12. Under **Requisition Information**, the **Requisition Type Box ①**, you can change the product's requisition type by clicking the drop-down menu **☰ ②** and selecting the new type from the list.

Checkout

Company	Requester	Requisition	Status	Total Amount
RFCUNY	Paul Price [C]	- new -	Draft	75.00 USD

▼ **Shipping Address**

Deliver-To (empty)

Ship-To Address 695 Park Avenue
New York, NY 10065
United States of America

▼ **Requisition Information**

Request Date * 08/13/2025

Currency * x USD

Requisition Type ① x Training Supplies ②

High Priority

Sourcing Buyer

Submitted by Paul Price [C]

Freight Amount 0.00

Other Charges 0.00

Memo to Suppliers

Internal Memo

Figure 13

11. The next section is **Goods**. **Services** is not used with Catalog items.as shown in **Figure 14 below**. When you click on Goods it will be highlighted in blue. To view all Goods categories, use the slide bar at the bottom of the **Goods Box 1**. The boxes below show you the information you will see as you move the slider. The categories will be prefilled except for the **Grant 2** and **Spend Category 3**, which needs to be completed. Either type in the Grant or click the drop-down menu **4** and select your Grant from the list. Do the same for **Spend Category 3**. Then click **Submit 5**. See **Figure 15, Page 12**.

The figure consists of three screenshots of a software interface, each showing a 'Goods' section with a horizontal slider at the bottom. The screenshots are annotated with circled numbers 1 through 5.

Screenshot 1 (Top): Shows the 'Goods' section with a table containing one item. The table has columns: Order, Image, Company, Item, Purchase Item, Item Description, Commodity Code, *Spend Category 3, and *Quantity. A slider is positioned at the left end, labeled with a circled '1'. The item details include: Company: RFCUNY Research Foundation of the City University of New York; Item Description: 2026 ATA-GLANCE 48" x 32" Yearly Dry Erase Wall Calendar, Reversible, White/Red (PM326-28-26); Commodity Code: [empty]; *Spend Category 3: [empty]; *Quantity: 1; Unit of Measure: Each; Conversion Factor: 0.

Screenshot 2 (Middle): Shows the 'Goods' section with a table containing one item. The table has columns: *Quantity, Unit Cost, Extended Amount, Deliver-To, *Ship-To Address, Ship-To Contact, Requested Delivery Date, Supplier, and Order-From Cont. A slider is positioned at the right end, labeled with a circled '1'. The item details include: *Quantity: 1; Unit Cost: [empty]; Extended Amount: 25.99; Deliver-To: [empty]; *Ship-To Address: 230 West 41st St. New York, NY 10036 United States of America; Ship-To Contact: Sean McPartland; Requested Delivery Date: [empty]; Supplier: S & B COMPUTER AND OFFICE PRODUCTS INC; Order-From Cont: [empty].

Screenshot 3 (Bottom): Shows the 'Goods' section with a table containing one item. The table has columns: Supplier Contract, Supplier Item Identifier, Item Identifiers, Tax, Tax Recoverability, Memo, Grant 2, and *Cost Center. A slider is positioned at the right end, labeled with a circled '1'. The item details include: Supplier Contract: [empty]; Supplier Item Identifier: 24627368; Item Identifiers: Manufacturer Part Number: PM3262826; Tax: Tax Applicability [empty], Tax Code [empty]; Tax Recoverability: [empty]; Memo: [empty]; Grant 2: [empty]; *Cost Center: 300000 RFCCO - CHIEF OPERATING OFFICER. A circled '4' is next to the *Cost Center field.

Screenshot 4 (Bottom): Shows a table with columns: *Fund, Department, Additional Worktags, and Splits. A slider is positioned at the right end, labeled with a circled '1'. The table contains one row: *Fund: RF Research Foundation; Department: [empty]; Additional Worktags: Location: RESEARCH FOUNDATION OF C.U.N.Y.; Splits: 0.

Figure 14

12. The next step is to either **Submit**, **Save for Later**, or **Continue Shopping** ❶. Also, by clicking on the three dots, ❷ you can **Edit Requisitions Default**, **Address** or **Cancel**.

We will click **Submit** ❸.



Figure 15

13. After clicking **Submit**, a pop-up screen will appear as shown in **Figure 16** below stating You have submitted. Your order is complete.

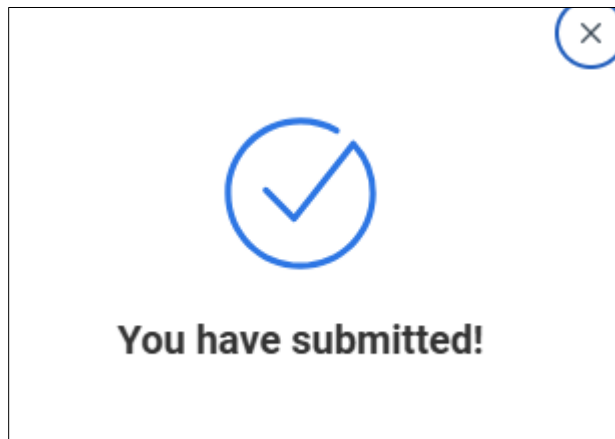


Figure 16