



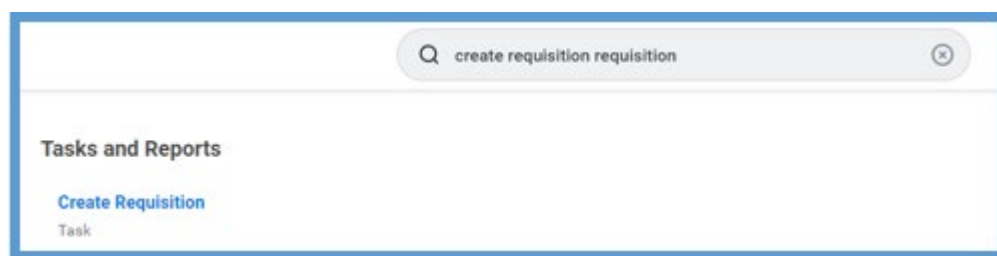
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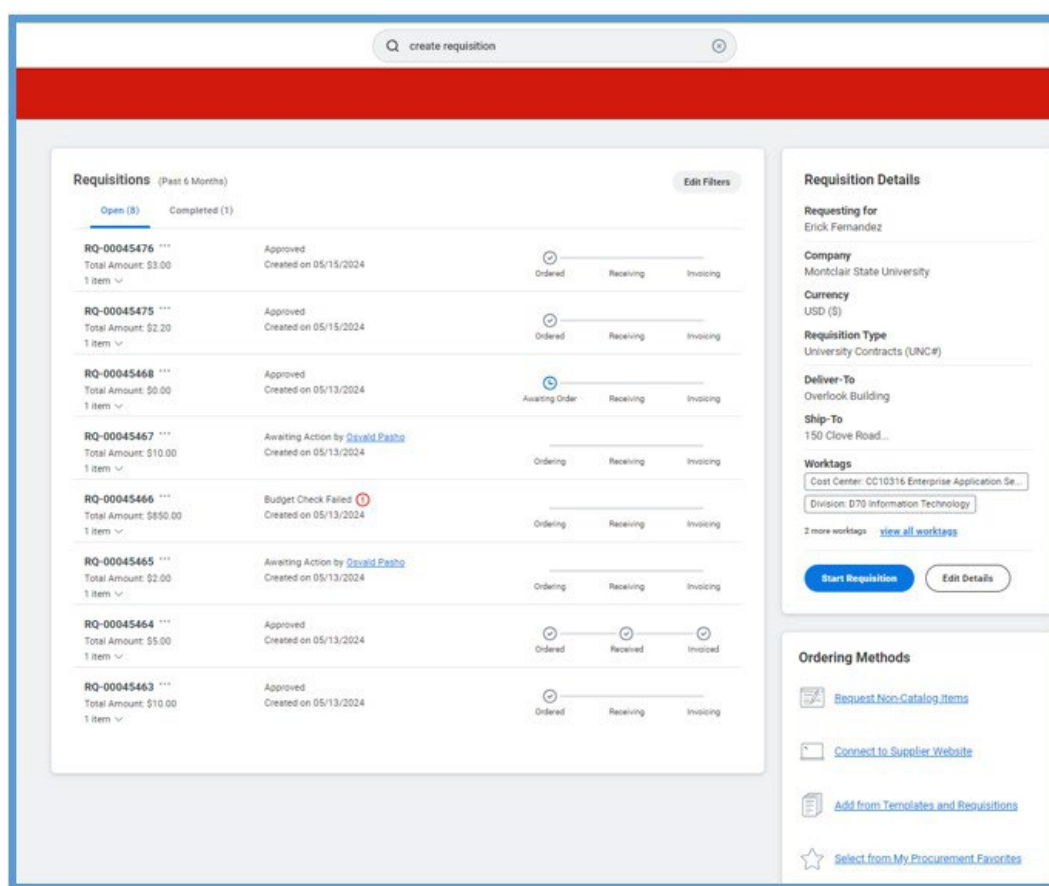
# Requisition Worklet Job Aid

## Getting to the Requisition Worklet Page

1. On the Search Bar, type either: “Create Requisition” or “My Requisitions”



2. The Requisition Worklet Screen will display after clicking “Create Requisition”



This screen displays a list of all requisitions created within the past 6 months, including the “Completed” requisitions\*. The new screen will display all the requisitions and the status of each of the processes associated with them.

*\*Please note that the system will display only the last 50 requisitions. If information on 50+ requisitions is needed, please run the “Requisition Life Cycle” Report.*

3. The “Requisition Details” displays the fields populated by default by Workday.  
**Please note that the system will always choose the “Requisition Type” used in the previous requisition. Make sure to change it accordingly.**

**Requisition Details**

**Requesting for**  
Erick Fernandez

**Company**  
Montclair State University

**Currency**  
USD (\$)

**Requisition Type**  
1 Quote

**Deliver-To**  
Overlook Building

**Ship-To**  
150 Clove Road...

**Worktags**  
Cost Center: CC10294 Purchasing  
Division: D53 Finance and Treasury

2 more worktags [view all worktags](#)

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

4. Click “Edit Details” if you would like to modify any of the fields displayed on the current screen (you can do this on the main page of the requisition later on too).

**Worktags**  
Cost Center: CC10316 Enterprise Application Se...  
Division: D70 Information Technology

2 more worktags [view all worktags](#)

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

5. In the “Edit Requisition Details” screen, modify accordingly and click “Save Changes”

**Edit Requisition Details**

Requesting for \*

Requesting Entity

Company \*

Currency \*

Requisition Type

Deliver-To

Ship-To \*

Cost Center

Division

Additional Worktags

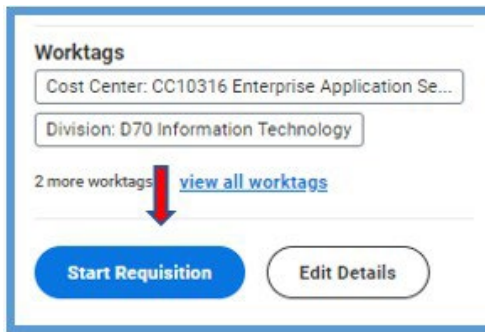
**Save Changes**

6. In the “Ordering Methods” section, choose whether your requisition is a “Non-Catalog” or a “Punch-Out.” This section also allows you to select templates (copy from previous requisitions).

**Please note that if you choose “Connect to Supplier Website,” the system will immediately connect you to the Punch-Out screen with which you are familiar.**

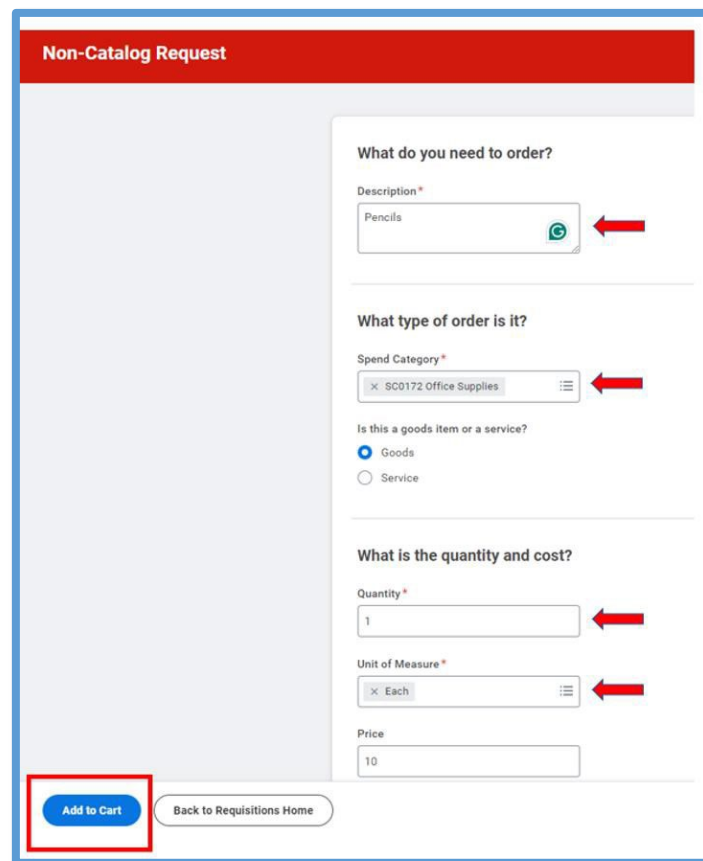
**Ordering Methods**

7. Click “Start Requisition,” and the system will display the new screen.



The screenshot shows a 'Worktags' section with two input fields: 'Cost Center: CC10316 Enterprise Application Se...' and 'Division: D70 Information Technology'. Below these fields, it says '2 more worktags' and has a link 'view all worktags'. A red arrow points down from the link to a blue button labeled 'Start Requisition' and a white button labeled 'Edit Details'.

8. Enter at least the mandatory information with the red asterisk. Click “Add to Cart.”

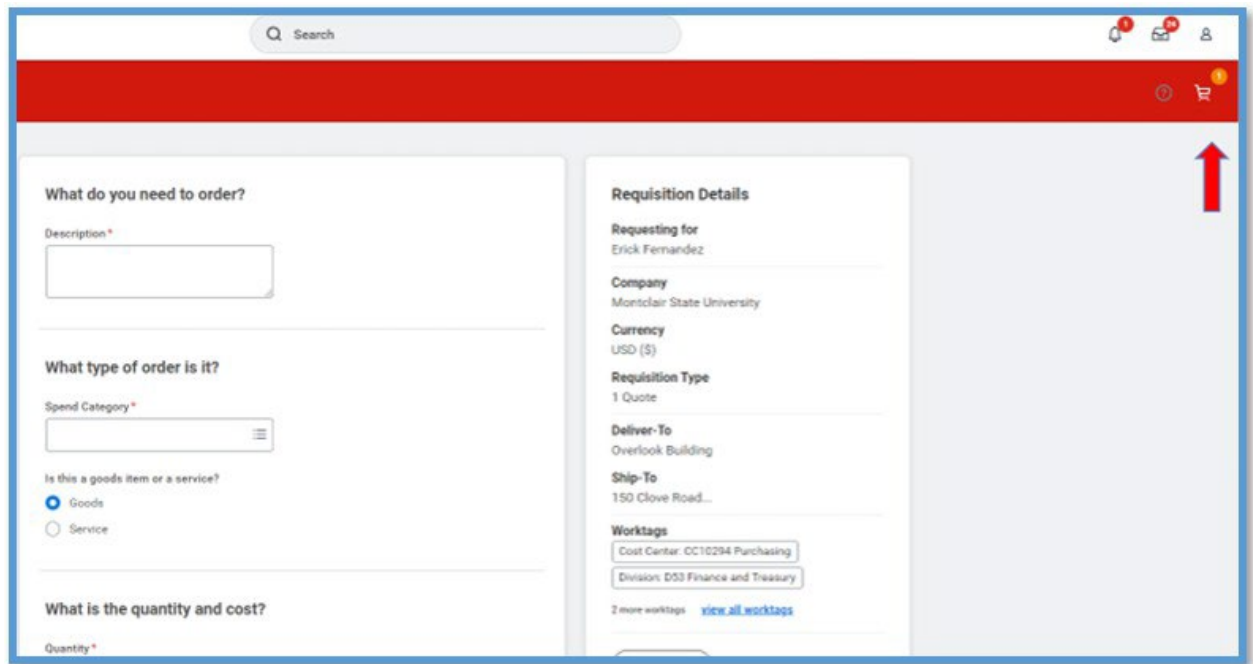


The screenshot shows a 'Non-Catalog Request' form. The form has a red header bar with the text 'Non-Catalog Request'. The form is divided into several sections:

- What do you need to order?**
  - Description\*: Pencils (with a red arrow pointing to the text input field)
- What type of order is it?**
  - Spend Category\*: SC0172 Office Supplies (with a red arrow pointing to the dropdown menu)
  - Is this a goods item or a service?
    - ☒ Goods
    - ☐ Service
- What is the quantity and cost?**
  - Quantity\*: 1 (with a red arrow pointing to the text input field)
  - Unit of Measure\*: Each (with a red arrow pointing to the dropdown menu)
  - Price: 10

At the bottom left, there is a blue button labeled 'Add to Cart' (highlighted with a red box) and a white button labeled 'Back to Requisitions Home'.

9. Please note that after clicking “Add to Cart,” the system stays on the same screen, and all the fields become blank. This is normal; click on the “Shopping Cart” or “Add Another Item”

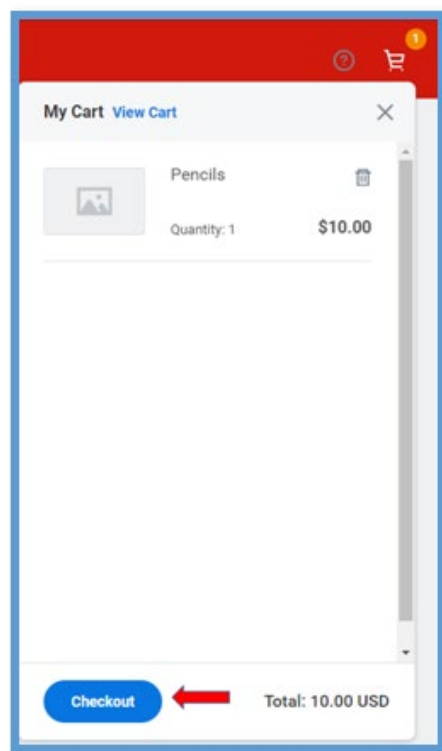


The screenshot shows a requisition form with the following sections:


- What do you need to order?**
  - Description\* (text input field)
- What type of order is it?**
  - Spend Category\* (dropdown menu)
  - Is this a goods item or a service?
    - ☒ Goods
    - ☐ Service
- What is the quantity and cost?**
  - Quantity\* (text input field)
- Requisition Details**
  - Requesting for: Erick Fernandez
  - Company: Montclair State University
  - Currency: USD (\$)
  - Requisition Type: 1 Quote
  - Deliver-To: Overlook Building
  - Ship-To: 150 Clove Road...
  - Worktags
    - Cost Center: CC10294 Purchasing
    - Division: D03 Finance and Treasury
    - 2 more worktags [view all worktags](#)

A red arrow points to the shopping cart icon in the top right corner of the page.

10. Once you click on the “Shopping Cart,” the system displays “My Cart – View Cart,” click “Checkout”

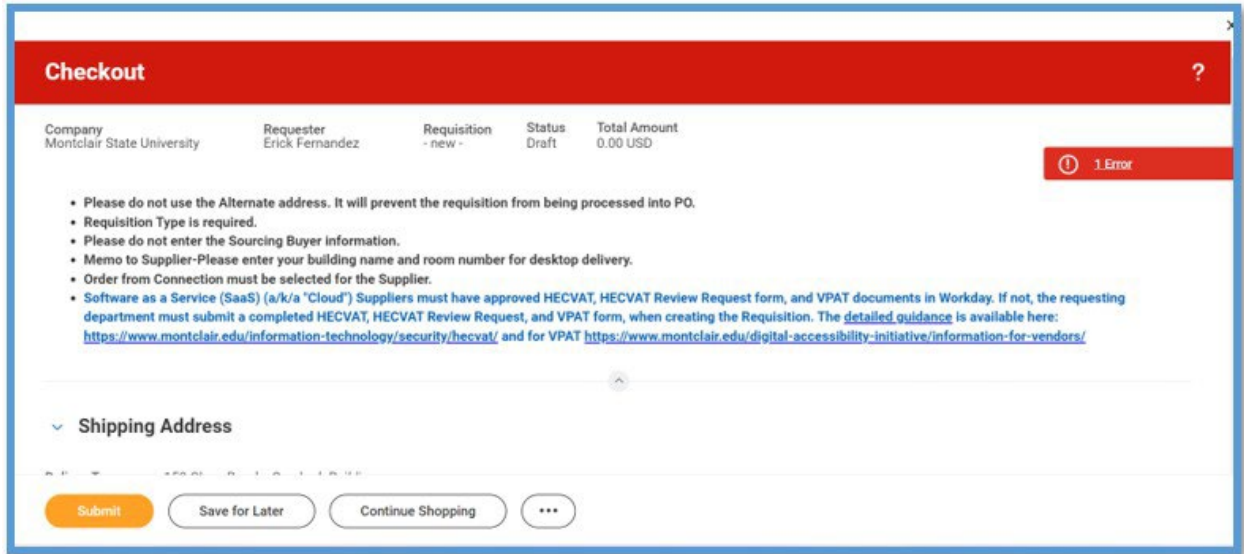


The screenshot shows the "My Cart" view with the following details:

- My Cart View Cart** (header with a close button)
- Items:**
  -  Pencils
  - Quantity: 1
  - \$10.00
- Checkout** button (blue)
- Total: 10.00 USD**

A red arrow points to the "Checkout" button.

11. After clicking “Checkout,” the system takes you to the screen you are familiar with. Please make sure all the necessary information that was **not** entered in the beginning is entered here in order to prevent any errors when submitting the requisition for approval.



The screenshot shows the "Checkout" page with a red header. Below the header, there is a summary table:

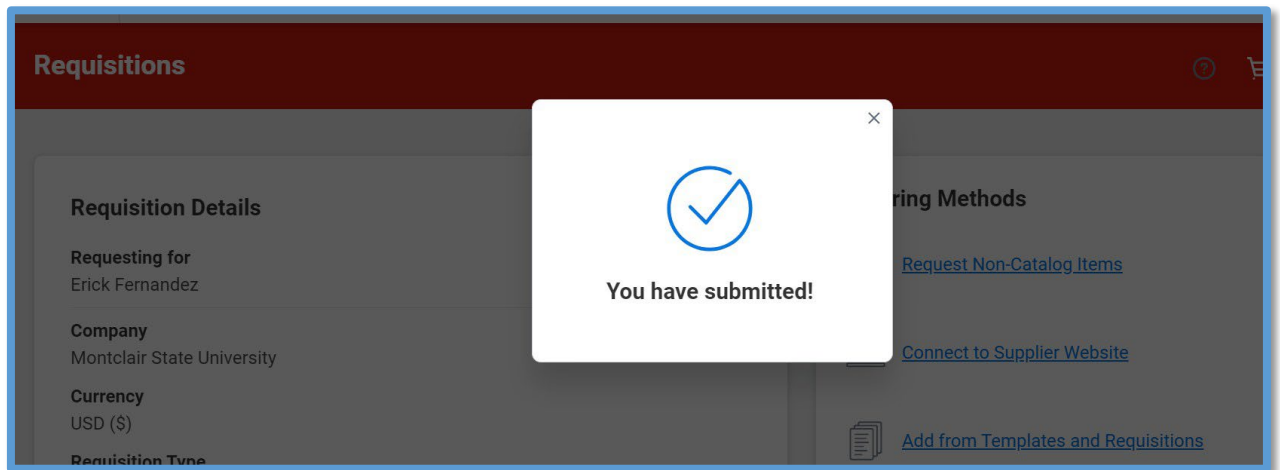
Company	Requester	Requisition	Status	Total Amount
Montclair State University	Erick Fernandez	- new -	Draft	0.00 USD

To the right of the table, there is a red box indicating "1 Error". Below the table, there is a list of instructions:

- Please do not use the Alternate address. It will prevent the requisition from being processed into PO.
- Requisition Type is required.
- Please do not enter the Sourcing Buyer Information.
- Memo to Supplier-Please enter your building name and room number for desktop delivery.
- Order from Connection must be selected for the Supplier.
- Software as a Service (SaaS) (a/k/a "Cloud") Suppliers must have approved HECVAT, HECVAT Review Request form, and VPAT documents in Workday. If not, the requesting department must submit a completed HECVAT, HECVAT Review Request, and VPAT form, when creating the Requisition. The [detailed guidance](https://www.montclair.edu/information-technology/security/hecvat/) is available here: <https://www.montclair.edu/information-technology/security/hecvat/> and for VPAT <https://www.montclair.edu/digital-accessibility-initiative/information-for-vendors/>

Below the instructions, there is a section for "Shipping Address" with a dropdown arrow. At the bottom, there are four buttons: "Submit", "Save for Later", "Continue Shopping", and a three-dot menu button.

12. Please note that after submitting a requisition using any type of Cooperative Contract (State, Local, National, GSA), University Contract, or Waiver of Advertising as the Requisition Methodology, the system will display the legend “You have submitted.” However, you will need to complete the questionnaire and submit it in order to trigger the approval process.



The screenshot shows the "Requisitions" page with a dark red header. A white modal box is centered on the screen, displaying a blue checkmark icon and the text "You have submitted!". The background is dimmed, showing the "Requisition Details" section with the following information:

- Requesting for: Erick Fernandez
- Company: Montclair State University
- Currency: USD (\$)
- Requisition Type: (partially visible)

To the right of the modal, there is a section for "Requesting Methods" with the following links:

- [Request Non-Catalog Items](#)
- [Connect to Supplier Website](#)
- [Add from Templates and Requisitions](#)

13. You can access the questionnaire by scrolling down to your open requisition worklet (the same page where you create or start the requisition process). Alternatively, you can go to your Inbox and complete the Contract Info questionnaire and click “Submit”.

Worklet View:

**Requisitions** (Past 6 Months) Edit Filters

[Open \(2\)](#) [Completed \(0\)](#)

**RQ-00073092** \*\*\*  
Total Amount: \$59.94  
1 item ▾

[Awaiting Action - Show Details](#)  
[Complete Questionnaire](#) **DUE**  
Created on 09/30/2025

Ordering Receiving Invoicing

Inbox View:

**MONTCLAIR STATE UNIVERSITY** my requisitions

**All Items** 25 items

Search: All Items

[Advanced Search](#)

**Collect Contract/Waiver Number** 05/13/2024  
Requires your attention as information has been ch...  
Due: 05/15/2024

**Check Budget (Financial) for Requisition** 05/13/2024  
Due: 05/14/2024

**Requisition: RQ-00045361** 02/02/2024

**Collect Contract/Waiver Number** ←  
'Question For Collect Contract/Waiver Number' for Requisition: RQ-00045468, Requester: Erick Fernandez, Date: 05/13/2024, Amount: \$0.00

Question For Collect Contract/Waiver Number

What is the Contract /Waiver Number? (Required)

[Submit](#) [Save for Later](#) [Cancel](#)

14. Once you submit the questionnaire, you will be able to see the current status of the requisition on the Worklet page, as well as the receiving and invoicing status. Proceed to click on the “Awaiting Action – Show Details” button to see next steps.

**Requisitions** (Past 6 Months) Edit Filters

[Open \(2\)](#) [Completed \(0\)](#)

**RQ-00073092** \*\*\*  
Total Amount: \$59.94  
1 item ▾

[Awaiting Action - Show Details](#)  
Created on 09/30/2025

Ordering Receiving Invoicing

**RQ-00064814** \*\*\*  
Total Amount: \$59.94  
1 item ▾

[Awaiting Action - Show Details](#)  
Created on 04/23/2025

Ordering Receiving Invoicing



Requisition Process History							
30 items							
Process	Step (All)	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comm
Requisition Event	Approval by Gift Manager (All)	Not Required		10/04/2025		0	
Requisition Event	Approval by Category Approver Special	Not Required		10/04/2025		0	
Requisition Event	Approval by Cost Center Manager (All)	Awaiting Action		10/02/2025	Donna Sadlon (Cost Center Manager)	1	

15. The Requisition Worklet page will display important information such as Budget Errors, Awaiting Action, and requisition Approval status. You can also find important information such as Purchase Order number, Receipts, and Invoices, along with payment status, by simply clicking the fields **Ordered**, **Received**, and **Invoiced**.

- a- Click on any “Red Warning” in order to see the error Workday has encountered

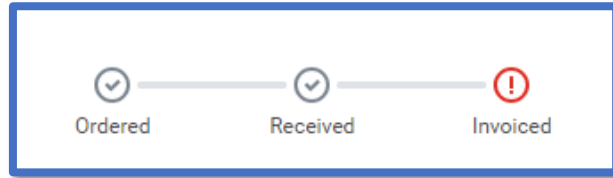
The screenshot shows a list of requisitions. The first requisition, RQ-00045466, has a total amount of \$850.00 and a status of 'Budget Check Failed' with a red warning icon. A blue arrow points to this icon. Below it, another requisition RQ-00045465 is shown with a status of 'Awaiting Action by Erick Fernandez'. A third requisition RQ-00045464 is shown with a status of 'Approved'.

- b- Click on the three dots next to the requisition number so that you can edit the

The screenshot shows the same list of requisitions. A red arrow points to the three dots next to the requisition number RQ-00045466. A dropdown menu is open, showing the following options: View, Edit, View Accounting, and Cancel Requisition. The requisition details for RQ-00045466 are also visible: Total Amount: \$850.00, 1 item, and Budget Check Failed.

requisition accordingly

- c- Click on the “Ordered,” “Received,” and or “Invoiced” fields to see the information associated with it.



d- **Awaiting Order – Ordering – Ordered Field**

- Awaiting Order: the requisition has been approved but has not yet been sourced.
- Ordering: the requisition has been approved and partially sourced.
- Ordered: the requisition has been approved and fully sourced.

A screenshot of the 'Ordered' field details. At the top, there is a progress bar with three stages: 'Ordered' (checkmark), 'Received' (checkmark), and 'Invoiced' (exclamation mark). Below the progress bar, the word 'Ordered' is displayed in bold. Underneath, there is a blue hyperlink 'PO-0000043461'. Below the link, the following information is listed: 'Status: Issued', 'Contact: [Osvald Pasho](#)', and 'Supplier: W B MASON CO INC'.


e- **Receiving – Received Field**

- Receiving: the PO has been issued but has not been fully received
- Received: the PO has been issued and has also been fully received

A screenshot of the 'Received' field details. At the top, there is a progress bar with three stages: 'Ordered' (checkmark), 'Received' (checkmark), and 'Invoiced' (exclamation mark). Below the progress bar, the word 'Received' is displayed in bold. Underneath, there is a blue hyperlink 'RC-0000056319 for PO-0000043461'. Below the link, the following information is listed: 'Status: Draft' and 'Supplier: W B MASON CO INC'. In the top right corner, there is a label 'Division: D53 Finance'.

f- **Invoicing – Invoiced – Match Exception**

- Invoicing: the purchase order has been issued but has not been fully invoiced
- Invoiced: the purchase order has been issued and has also been fully invoiced
- Match Exception: the purchase has been invoiced, but there is an invoice in match exception (most likely due to a missing receipt).




Division: D53 Finance

### Invoiced

[Supplier Invoice: SI-0000083090](#)

Status: Approved

Match Status: Exception 

Payment Status: Unpaid

Contact: [Cheri Jefferson](#)

Supplier: W B MASON CO INC

- g- Finally, when the requisition cycle is done, the system switches the requisition from the “Open” to the “Completed” tab

### Requisitions


(Past 6 Months)

Open (6)

Completed (1)

**RQ-00045418** \*\*\*

Total Amount: \$6.00

1 item 

Approved

Created on 02/13/2024

COMPLETED