

# Jason's Guide to Requisitions

*Disclaimer: This document is meant only to provide general guidelines and tips on how to create a requisition to reduce the number of questions and time it takes to process a requisition. It is not meant to be the final word in how the process should be completed. For official guides and policies, please see the Jira guide:*

*<https://jira.esq.wsu.edu/servicedesk/customer/kb/view/156963461> as well as the WSU BPPM on purchasing: <https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/>.*

## Creating a Requisition:

1. In Workday, click in the search bar at the top of the screen and enter, "Create Requisition"
2. Select the "Create Requisition" Task
3. In the screen that comes up, enter the Requisition Type:
  - a. Most often, this will be "One Time Goods or Services Purchase"
  - b. For new software contracts or rentals, use "Delegated Signature Required"
  - c. The purchase may fall under "Machinery and Equipment Tax Exempt" if it meets the requirements in WSU BPPM 70.42:  
[\(https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/bppm-70-42/\)](https://policies.wsu.edu/prf/index/manuals/business-policies-and-procedures-manual/bppm-70-42/)
    - i. Equipment must cost in excess of \$2500, have a useful life of more than one year, not be a consumable item, and not be a power tool
    - ii. Equipment must either be used more than 50% of the time in research and development or more than 50% of the time in testing operations
    - iii. If the item is being attached to other equipment that is already qualified, it may also fall under M&E Tax Exempt status
  - d. M&E Tax Exempt Requisitions will require completion of a questionnaire and route to WSU Purchasing Services after approval
4. You do not need to adjust the "Deliver-To" or "Ship-To" addresses
5. Enter the Worktag (budget number) that you would like to use for this purchase:
  - a. This is NOT the ORSO or Award (AWD###) number, these are instead the grant, program, project, or gift numbers that are given as a part of the Awards
    - i. Project numbers begin with the letters "PJ" followed by a number string
    - ii. Program numbers begin with the letters "PG" followed by a number string
    - iii. Gift numbers begin with the letters "GF" followed by a number string
    - iv. Grant numbers begin with the letters "GR" followed by a number string
  - b. Please contact the EECS Front Office if you do not have the Worktag number for the budget you would like to use
6. The remaining necessary boxes will auto-populate with information related to the budget
7. Click "OK" at the bottom
8. Select "Request Non-Catalog Items" on the next screen

## Entering Items for the Purchase:

### Notes:

- a. You may only enter items from one Supplier in each requisition. If you are purchasing items from Amazon and items from Newegg, you must submit one requisition for each
  - b. Different items must be separated onto different lines, and cannot be put under groupings such as "cables"
  - c. If the purchase is based off a quote, each line must match a line item in the quote for description and price.
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1. All requisition items will be marked as "Request Goods"
  2. Fill out the *Item Description* box with model number and description of the item to be purchased (more information is better!)
    - a. If the purchase is for shipping, please enter the full name, address, and *phone number* of the recipient here
  3. If you can find a unique item identifier for the item on the quote or supplier website, enter it in the *Supplier Item Identifier* box
  4. Enter the Spend Category for the item you are purchasing from the list: (<https://jira.esg.wsu.edu/servicedesk/customer/kb/view/169154189>) with common categories shown below:
    - a. Laptops, tablets, and notebook computers are in SC00254. These items will receive a WSU Inventory Tag when they arrive
    - b. Computing equipment costing over \$5000 falls under SC00273. These items will also receive an Inventory Tag
    - c. Monitors, desktops, keyboards, hard drives, Raspberry Pis, and other computing equipment will fall under SC00039. Though it mentions "non-inventoried" in the title, the department may elect to apply a Department Inventory Tag to the item
    - d. Consumable research materials or items generally expended within 1 year of purchase will fall under SC00041
    - e. Items purchased for instruction or lab research that are not generally consumable will fall under SC00040
    - f. Paper, ink, staplers, pens, or other items purchased for office use will be SC00038
    - g. Small software purchases will fall under SC00256 and will require an ITS questionnaire and approval
    - h. Shipping and shipping charges will fall under SC00159
  5. Enter the name of the supplier you are purchasing from in the *Supplier* box and select the appropriate one from the list.
    - a. If no options come up, enter the supplier in the memo box below instead
  6. Enter the quantity of the item you would like to have ordered
  7. Enter the cost of an individual item in the *Unit Cost* box
  8. For the *Unit of Measure* box, please select from the list the one that best fits the type of item you are purchasing, with most common being "Each"

9. In the *Memo* box at the bottom, include a link to the item when purchasing from a website to be sure the correct item is purchased
10. Select *"Add to Cart"* at the bottom of the screen once the boxes listed above are complete
11. Repeat for additional items or quote lines
12. Once you have added all of the items you would like purchased, click on the cart icon in the upper right of the screen, and select *"Checkout"*

## The Checkout Screen

### *Notes:*

- a. *Often, an error will immediately pop up. This is due to the selected taxes, which will be addressed below*
  - b. *It is not necessary to change any items except that which are addressed below, and may cause delay in processing the requisition*
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1. In the *"Memo to Suppliers"* box, enter the quote number if you have one, and any other information that is necessary for us to tell the Supplier regarding this purchase
  2. In the *"Internal Memo"* box, enter any information that is necessary for your department to know
    - a. If the item you are purchasing will be attached to a larger piece of equipment or project that already has a WSU Inventory Tag, enter the equipment name and tag number here!
  3. On the table that shows the goods you have requested; you will want to scroll to the right until you see the *Tax* columns and check the below items:
    - a. The *Tax Applicability* box should be either *"Taxable"* if there are no exceptions, *"Non-Taxable"* if the purchase is for shipping, or *"M&E Tax Exempt"* if the purchase qualifies according to the above info
    - b. In the *Tax Code* box, if the item is *"Non-Taxable"*, leave this box blank. Otherwise, enter *"Pullman"* and select *"3812 Pullman Sales and Use Tax"* from the list
  4. In the *"Attachments"* drop down section you will want to drag and drop or upload any files relating to this purchase
    - a. If you are not the Principal Investigator for the grant or budget you are using, you must upload a .pdf or screenshot of the PI giving you permission to use their budget.
    - b. Upload any quotes or documents from the supplier
    - c. Upload any sole source justification documents for orders over \$10,000 (see below)

### *On purchasing items over \$10,000:*

*If an order would cost greater than \$10,000 (prior to tax and shipping), and WSU does not already have a standing contract with the supplier (such as Silicon Mechanics or CDW-G), Washington State Law requires that the item be purchased through a competitive bidding process. The requestor is required to submit three quotes from three different companies to show that the supplier they wish to use is least expensive for any similar products. Alternatively, the requestor may submit a Sole Source Justification Memo, to describe why the product and*

supplier they wish to use are the only ones who can provide what is needed for the intended use case. Further information can be found on WSU Purchasing Services' website and Washington State Law using links below:

- Direct Buy Limit FAQ's: <https://purchasing.wsu.edu/direct-buy-limit-faqs/>
- Sole Source Justification Documents – Download:  
<https://purchasing.wsu.edu/documents/2016/05/sole-source-justification-guidelines.doc>
- Additional Guidance for Sole Source Memos – Download:  
<https://purchasing.wsu.edu/documents/2016/05/guidance-and-examples-for-sole-source-memos.doc>
- Washington State Legislature website on Procurement:  
<https://app.leg.wa.gov/RCW/default.aspx?cite=39.26>

5. Once you have entered any necessary attachments, you may click on “Submit” at the bottom of the screen. You may also select “Save for Later” if you would like to come back and complete the requisition later.

After the Requisition has been completed:

- Once the requisition is submitted, the requestor will be sent the relevant questionnaire in Workday if it was labeled as a software purchase or M&E Tax Exempt
- Next, it will be sent to the fiscal analyst (or equivalent roll) of the department who oversees the budget it was submitted under
- Once the fiscal analyst approves it, it will be sent to that department's grant manager for approval
- Once the grant manager approves the expense, it will be sent to the department's purchaser to complete the purchase and order the item, unless:
  - It required an ITS Questionnaire; in which case the requisition will be sent to the ITS department for approval before it can be purchased
  - It was listed as M&E Tax Exempt, requires a delegated signature or is in excess of \$10,000, in which case it will be sent to Purchasing Services for them to complete