

The seal of Mobile County, Alabama, is a circular emblem. It features a central shield with a ship, a building, and a plow. The shield is surrounded by a wreath. The words "MOBILE COUNTY ALABAMA" are inscribed around the top of the seal, and "ESTABLISHED 1800" is at the bottom.

MOBILE COUNTY COMMISSION

Procurement Training

PART 1 – Create Requisition

Service Coordinator



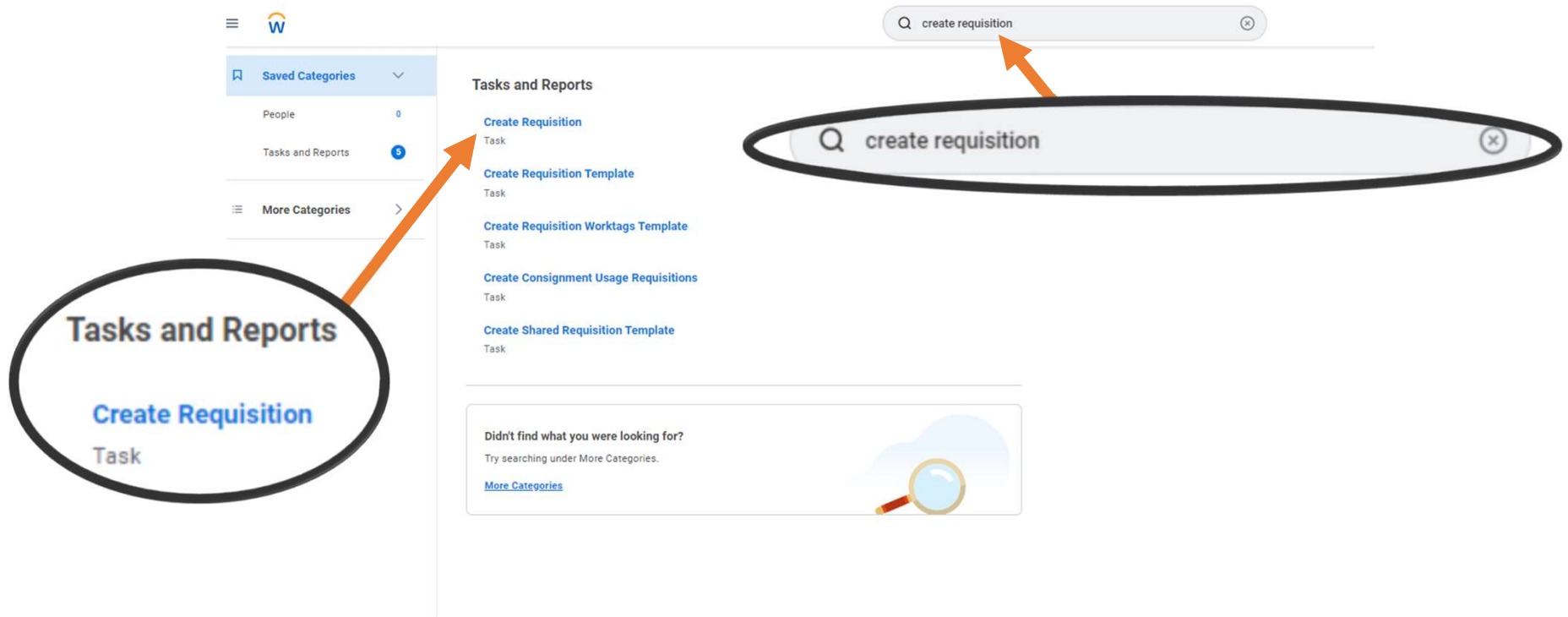
In Workday, the Procurement Module handles the purchasing and receipt of goods and services delivered to Mobile County. It allows items to be requested, approved for purchase, and sourced to the appropriate supplier.



TERMINOLOGY

CURRENT TERMINOLOGY	WORKDAY TERMINOLOGY
VENDOR	SUPPLIER
DEPARTMENT	COST CENTER
OBJECT CODE	SPEND CATEGORY

Creating a Requisition (Step 1)



- Access the **Create Requisition** task from the Search Bar.
- Click the **Create Receipt** task listed under Task and Reports.

Creating a Requisition (Step 2a)

Create Requisition

Requester	*	X Amanda Auld ...	:
Requesting Entity			:
Company	*	X MCC Mobile County Commission ...	:
Currency	*	X USD ...	:
Requisition Type		X Cleaning Supplies ...	:
Deliver-To		X Camp 1 - Main ...	:
Ship-To	*	X 1150 N. Schillinger Rd Mobile, AL 36608 United States of America	:
Project			:
Cost Center		X CC001 County Commission ...	:
Fund		X FUND001 General Fund ...	:
Function		X General Government ...	:
Additional Worktags		X Location: Camp 1 - Main ...	:

1. Enter the Requester's name.

- The following information should automatically populate.

- Company
- Currency
- Deliver-To
- Ship-To
- Cost Center
- Fund
- Function
- Additional Worktags

If any of this information does not populate please review and enter the missing information. The function may not populate. Please refer to the reference guide in your training packet for the function information for each cost center.

- If any of the above information needs to be changed, click on the X located next to the information you wish to remove and enter the needed information. *Note: When changing the Requester information it will automatically populate all other information with the Cost Center associated with their department. Be mindful of this when creating requisitions.*

2. Select the Requisition Type consistent with the purchase you would like to make. (Office Supplies, Cleaning supplies, Small Tools & Equipment, Blanket Purchase Order, etc.)

MOVE TO NEXT PAGE OF TRAINING MANUAL BEFORE CONTINUING.

Creating a Requisition (Step 2b)

The screenshot shows the 'Creating a Requisition' interface. The 'Ship-To' field is highlighted with a red star. An orange arrow points from the 'Ship-To' field to the 'Addresses by Location' menu. The 'Addresses by Location' menu is open, showing a list of locations. The 'Camp 1 - Main' location is selected, and the 'ELECTRONICS DEPT 1150' department is selected. The address '1150 N. Schillinger Rd Mobile, AL 36608 United States of America' is displayed at the bottom of the screen.

Addresses by Location

- Agricultural Center
- Animal Shelter
- Ann Street
- Bay Haas
- Blackwell Batson Senior Center
- Building Inspection Department
- Calcedever
- Camp 1 - Main
- Camp 1 Receiving Dock
- Camp 1 - Shop
- Camp 2
- Camp 3
- Search

1150 N. Schillinger Rd Mobile, AL 36608 United States of America

- If there are multiple departments under the Ship-To address you will need to define which location the order will need to be shipped to. (Examples include Departments located at Camp 1 and Government Plaza.)
- Select the menu icon in the Ship-To field and navigate to Addresses by Location.
- Select the department that the order should ship to.

• **Once you have verified all information is correct you can move forward by clicking **OK** at the bottom of the screen.**

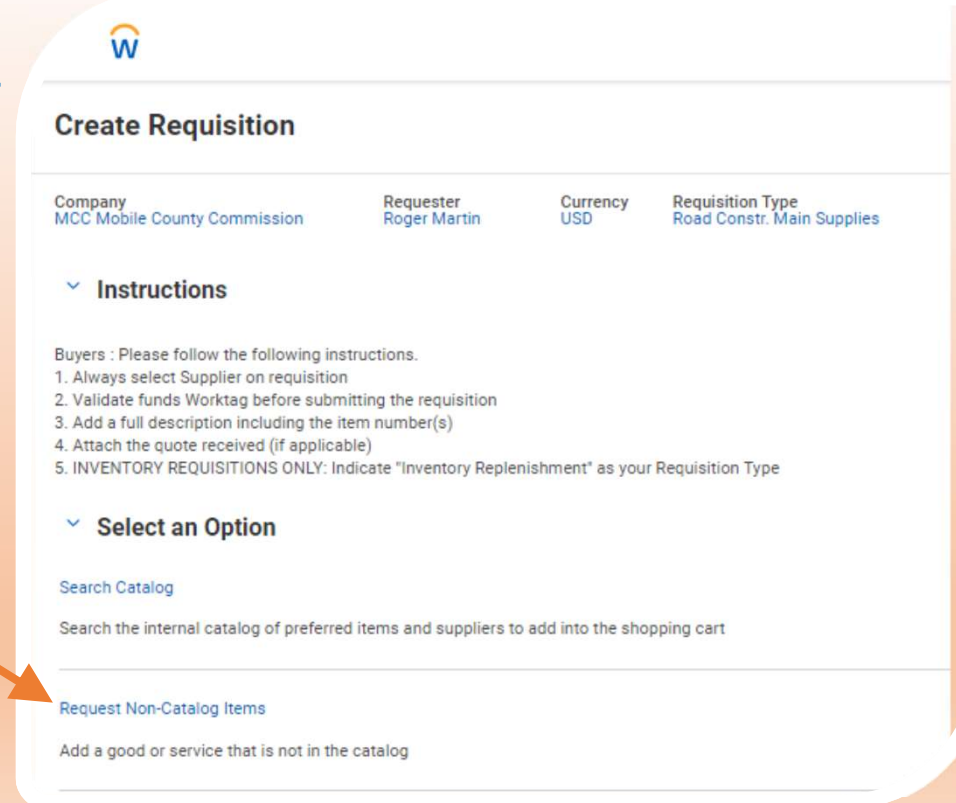
Creating a Requisition (Step 3a- Goods or Service)

(For Punch Out Instructions move to Step 3b)

- Click the Request Non-Catalog Items task under Select an Option.

Request Non-Catalog Items

- Move to Step 4a on page 10.



The screenshot shows the 'Create Requisition' form. At the top, there is a header with a 'W' logo. Below the header, the form is divided into sections. The first section contains metadata: Company (MCC Mobile County Commission), Requester (Roger Martin), Currency (USD), and Requisition Type (Road Constr. Main Supplies). The second section is titled 'Instructions' and contains a list of five instructions for buyers. The third section is titled 'Select an Option' and contains two options: 'Search Catalog' and 'Request Non-Catalog Items'. The 'Request Non-Catalog Items' option is highlighted with a blue background and an orange arrow pointing to it from the text 'Request Non-Catalog Items' in the callout box. Below the 'Request Non-Catalog Items' option, there is a description: 'Add a good or service that is not in the catalog'.

Create Requisition

Company: MCC Mobile County Commission | Requester: Roger Martin | Currency: USD | Requisition Type: Road Constr. Main Supplies

Instructions

Buyers : Please follow the following instructions.

1. Always select Supplier on requisition
2. Validate funds Worktag before submitting the requisition
3. Add a full description including the item number(s)
4. Attach the quote received (if applicable)
5. INVENTORY REQUISITIONS ONLY: Indicate "Inventory Replenishment" as your Requisition Type

Select an Option

[Search Catalog](#)

Search the internal catalog of preferred items and suppliers to add into the shopping cart

[Request Non-Catalog Items](#)

Add a good or service that is not in the catalog

Creating a Requisition (Step 3b- Punch Out Option)

✓ **Select an Option**

[Search Catalog](#)
Search the internal catalog of preferred items and suppliers to add into the shopping cart

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

[Connect to Supplier Website](#)

Supplier Punchout Websites:

- Grainger
- Office Depot
- Staples




1. **Select Connect to Supplier Website under Select an Option.**

2. **Select Connect next to the Supplier you wish to place an order with. You will then be taken to the Suppliers website where you will be able to add items directly to your cart from their website.**

Connect to Supplier Website ⋮

Company [MCC Mobile County Commission](#) Requester [Amanda Auld](#) Currency [USD](#) Requisition Type [Cleaning Supplies](#)

Supplier Websites 3 items

	Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
		Office Depot	<input type="checkbox"/>	OFFICE DEPOT		Connect
		Staples	<input type="checkbox"/>	STAPLES BUSINESS ADVANTAGE		Connect
		Grainger	<input type="checkbox"/>	GRAINGER INDUSTRIAL SUPPLY		Connect

8

Creating a Requisition (Step 3b- Punch Out Option Continued)

1. When doing a Punch Out please review your cart on the suppliers website. ***Once you move forward to the next step you cannot go back and make any changes.***
2. Choose the check out option once you have added all of your items.
3. Once you have selected the check out option you will be directed back to Workday. (Skip to Step 4e and continue through each step that follows)
4. Review all of the information on each line to ensure that everything is accurate.



Creating a Requisition (Step 4a-4e)

Steps 4a-4d are for Non-Catalog purchases ONLY.

The screenshot displays the requisition creation interface. At the top, the 'Company' is 'MCC Mobile County Commission' and the 'Requester' is 'Roger Martin'. The 'Requisition Currency' is set to 'USD'. The 'Non-Catalog Request Type' section has 'Request Goods' selected. The 'Goods Request Details' section includes fields for 'Item Description' (Blue Pen), 'Supplier Item Identifier', 'Commodity Code', 'Spend Category' (Office Supplies), 'Supplier' (STAPLES BUSINESS ADVANTAGE), 'Supplier Contract', 'Quantity' (1), 'Unit Cost' (11.48), 'Unit of Measure' (Pack), 'Extended Amount' (11.48), and a 'Memo' field. A 'My Cart' overlay is shown, listing 'Blue Pen' with a quantity of 1 and a price of \$11.48. The cart total is 11.48 USD. An orange arrow points from the 'Add to Cart' button in the requisition form to the shopping cart icon in the top right corner of the screen.

- Ensure that either the Request Goods or Request Service box is selected.
 - FOR ALL BLANKET PURCHASE ORDERS YOU MUST SELECT **"REQUEST SERVICE"** WHETHER THE REQUEST IS FOR GOODS OR SERVICE. SEE PAGES 16-17 FOR DETAILED NOTES ON BLANKET PURCHASE ORDERS.
- Enter the Item Description, Supplier Item Identifier (if available), Commodity Code, Spend Category, Supplier, Quantity, Unit Cost, and Unit of Measure.
- Enter a Memo on the Requisition with any additional information for the purchase request.
- Click **Add to Cart**

Repeat the steps above to add additional items

- Once all items have been added to the cart, click the shopping cart icon at the top right hand side of your screen.

Creating a Requisition (Step 5a-5f)

Requisition Information

Request Date * 08/02/2022

Currency * USD

Requisition Type * Office Supplies

High Priority ☐

Sourcing Buyer

Submitted by Amanda Auld

Freight Amount 0.00

Other Charges 0.00

Memo to Suppliers

Internal Memo

- Verify that you have selected a Requisition Type.
- If you know who your sourcing Buyer is you may enter that information on this page. **NOTE: If the purchase exceeds \$4,000, then it will route to the Purchasing Agent for approval.**
- If you have information that you would like to show up on the purchase order copy, please type it in the Memo to Suppliers. (i.e. Bid Number, Contract Number, Quote Number, Equipment Number, etc.)
- Scroll down to the Goods and/or Service Line to verify that all information is accurate. **For instructions on Splitting Cost Centers refer to pages 12-15 of your manual.**
- Scroll down to the Attachments and select an Attachment for the Requisition. (Quote, Purchase Request, etc.)
- Click **Submit**

Goods

Order	Image	Item	Description	*Spend Category	*Quantity	Unit Cost	Extended Amount
		Item	Blue Pen	Commodity Code	Quantity *	Unit Cost	11.48
		Purchase Item		Spend Category *	Unit of Measure *		
				Office Supplies	Pack		

Services

Order	Image	Item	Description	*Spend Category	Extended Amount	Date	Deliver-To
No Data							

Attachments

Once all steps are complete, the Requisition Business Process begins. It will route to the Cost Center Buyer for the specified Cost Center on the Requisition. Once this Approval step is completed it will route to the appropriate Spend Category Buyer to Source the Requisition to a Purchase Order.

Creating a Requisition

(Create Split between Cost Centers—Step 1)

1. In order to split your purchase line between more than one Cost Center, you will need to scroll to either your Goods or Service line and scroll to the far right.
2. Select the Icon under Splits for the line you wish to adjust between the Cost Centers.

Goods

Items

Order	Image	Item	Item Description	*Spend Category	*Quantity	Unit Cost	Extended Amount	Deliver-To	*Ship-1
No Data									

Services


Item

Supplier	Memo	Project	*Cost Center	*Fund	*Function	Additional Worktags	Splits
Supplier x KNOX PEST CONTROL ...			x CC001 County Commission ...	x FUND001 General Fund ...	x General Government ...	x Location: Camp 1 - Main ...	0
Order-From Connection							
Supplier Contract							

Creating a Requisition

(Create Split between Cost Centers—Step 2: Service Line)

- **SERVICE LINE**









- Delegate the Percentage or Amount that you would like to go to each cost center in the appropriate field.
 - When using Percent verify that the Amount populated is accurate in comparison to your expected calculations.
- Enter a Memo for informational purposes.
- Click  to add additional lines.
- Enter the cost center for each line and verify that the information showing is accurate.
- Select Done. (Move to Page 16)

0

Split by Amount

Pest Control Services 1,200.00 USD 0.00 USD
Description Amount Split Remaining Amount to Split

2 items

			Memo	Project	*Cost Center	*Fund	*Function
	Percent 50	Amount 600.00	TRUCK SHOP		 CC081 Mobile County Engineering and Public Works	 FUND111 Gasoline Tax Fund	 Highways and Roads
	Percent 50	Amount 600.00	PARTS/SUPPLY ROOM		 CC001 County Commission	 FUND001 General Fund	 General Government


Done

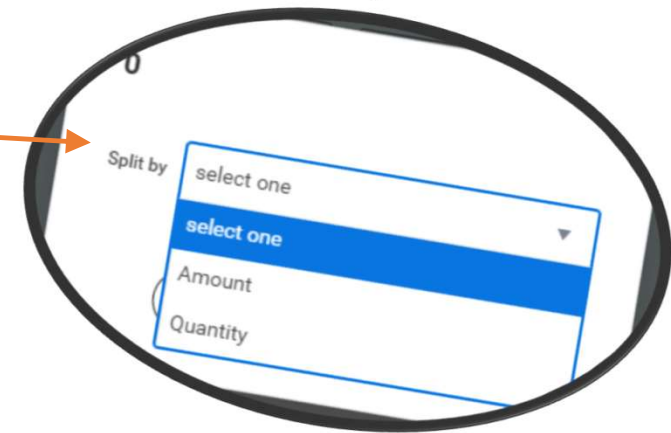
Cancel

Creating a Requisition

(Create Split between Cost Centers—Step 2: Goods Line)

• SERVICE LINE



- Select a Split by option from the menu.
 - Split by Quantity suggested for splitting the number of items ordered between Cost Centers.
 - Split by Amount suggested if you would like to delegate a percentage of the purchase to different cost centers.
- Enter a Memo for informational purposes.
- Click  to add additional lines.
- Enter the Quantity or Percent delegated for each line and verify that the information showing is accurate.
- Select Done. (Move to Page 16)



Split by: Quantity

INSECTICIDE
ANT AND ROACH SPRAY 5 0
Item Quantity Split Remaining Quantity to Split

2 items

	Quantity	Amount	Memo	Project	*Cost Center	*Fund	*Function
	<input type="text" value="3"/>	11.97	PARTS/SUPPLY ROOM		× CC001 County Commission	× FUND001 General Fund	× General Government
	<input type="text" value="2"/>	7.98	TRUCK SHOP		× CC081 Mobile County Engineering and Public Works	× FUND111 Gasoline Tax Fund	× Highways and Roads

Done

Cancel

Creating a Requisition (Create Split between Cost Centers—Step 3)

- The Splits icon should now be highlighted and show the number of lines entered.
- Click submit.
- On the next screen select Details and Processes and scroll to the Goods or Service Line you created the Split for.
- Click the Splits icon to view the information submitted.



2

Split by Quantity

INSECTICIDE
ANT AND ROACH SPRAY

Item Quantity Sp Remaining Quantity to Split

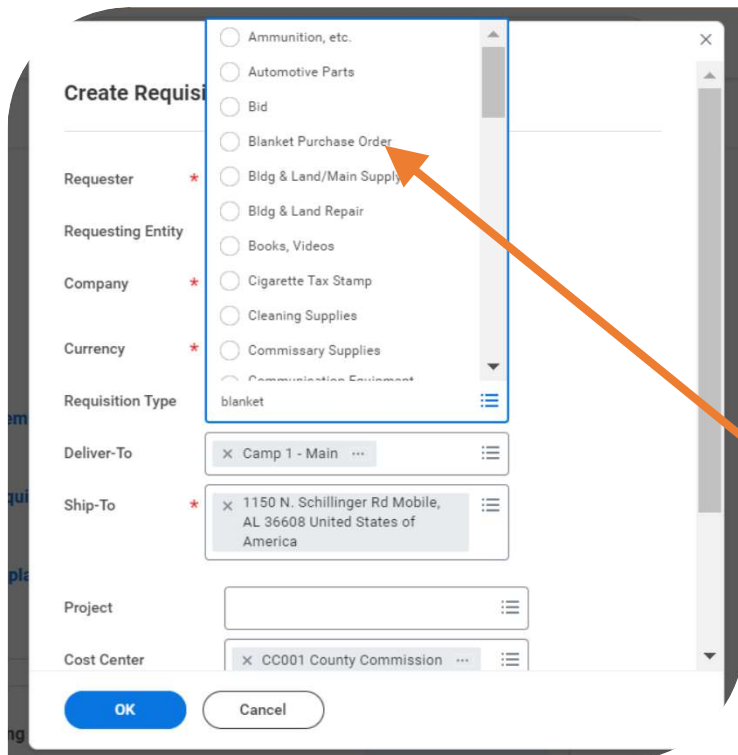
Turn off the new tables view

2 Items

		Memo	Project	*Cost Center	*Fund	*Function	Additional Worktags
Quantity	Amount	PARTS/SUPPLY ROOM		CC001 County Commission	FUND001 General Fund	General Government	Location: Camp 1 - Main
3	11.97						
Quantity	Amount	TRUCK SHOP		CC081 Mobile County Engineering and Public Works	FUND111 Gasoline Tax Fund	Highways and Roads	Location: Camp 1 - Main
2	7.98						

Done

Creating a Requisition (Creating a Blanket Purchase Order Notes)



The screenshot shows the 'Create Requisition' form. The 'Requisition Type' dropdown is open, showing a list of options. An orange arrow points from the 'Blanket Purchase Order' option in the dropdown to the 'Request Non-Catalog Items' section below.

Create Requisition

Requester *

Requesting Entity

Company *

Currency *

Requisition Type: blanket

Deliver-To: x Camp 1 - Main

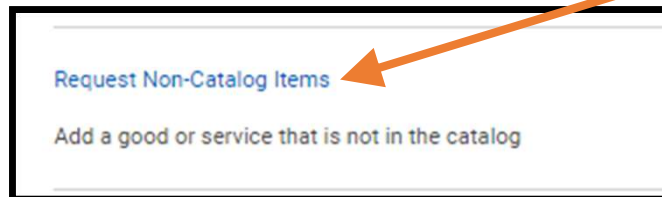
Ship-To: * x 1150 N. Schillinger Rd Mobile, AL 36608 United States of America

Project

Cost Center: x CC001 County Commission

OK Cancel

- ✓ Follow Steps 1-5 for Creating Requisitions.
- ✓ When selecting Requisition Type for a Blanket always choose Blanket Purchase Order.
- ✓ Always choose Request Non-Catalog Items on the Create Requisition Screen.



The screenshot shows the 'Request Non-Catalog Items' section. An orange arrow points from the 'Request Non-Catalog Items' text to the description below.

Request Non-Catalog Items

Add a good or service that is not in the catalog

Continued on Next Page...



Creating a Requisition (Creating a Blanket Purchase Order Notes) Continued...

any
Mobile County Commission

Requester
Amanda Auld

Requisition Type
Blanket Purchase Order

Requisition Currency *

Non-Catalog Request Type

☐ Request Goods

☒ Request Service

Service Request Details

Description *

Commodity Code

Spend Category *

Supplier

Supplier Contract

Start Date

End Date

Extended Amount

Memo

✓ **Blanket Purchase Orders will always have a Non-Catalog Request Type of "Request Service"**

✓ **Start Date and End Date is REQUIRED on all Blanket Purchase Orders.**

✓ **Enter the Extended Amount to cover the total amount of the Blanket Purchase Order.**

✓ **Continue as instructed in previous steps.**

NOTES: