

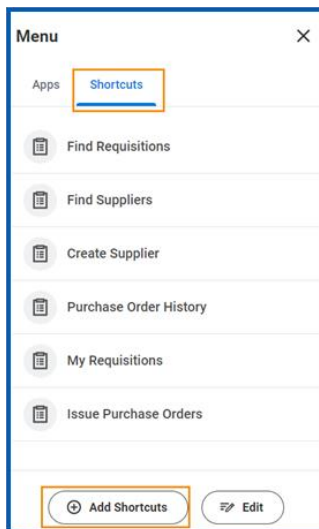
Create a Requisition

Requisitions will now be created and submitted in Workday.

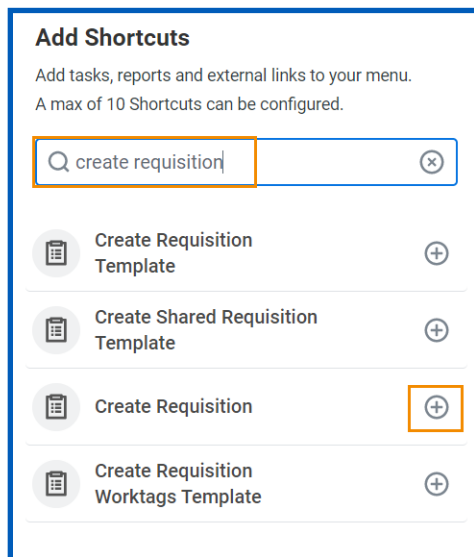
Configure the Create Requisition application as a shortcut

From the home page:

1. Select the Global Navigation **Menu** button.
2. On the Shortcuts tab, click **Add Shortcuts**.



3. From the Find Shortcuts search, search for Create Requisition.
4. Select the plus icon to add to your shortcuts.



5. The Create Requisition application will now appear in the Menu under Shortcuts.

Create a Requisition

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Requisition Non-Catalog Items

From the Home page:

1. Select the **Menu** button.
2. From your shortcuts, select the **Create Requisition** application.
3. Adjust **the Requester, Company, Currency, Deliver-To, Ship-To, Cost Center, Project**, and **Location** as needed.
4. Click the **OK** button.

Create Requisition

Requester	*	X [Redacted] ...	☰
Company	*	X LE040 BWC Terminals LLC ...	☰
Currency	*	X USD ...	☰
Requisition Type			☰
Deliver-To		X Corporate Office ...	☰
Ship-To	*	X 1111 Bagby Street Houston, TX 77002 United States of America	☰
Cost Center		X CC090 Operations ...	☰
Project			☰
Location		X Corporate Office ...	☰

OK Cancel

Create a Requisition

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- Click the **Request Non-Catalog** Items link.

Create Requisition

Company: LE040 BWC Terminals LLC Requester: Allison Urbanowich Currency: USD

Instructions

Before you process your requisition, please refer to the Company Procurement Policy <https://contanda.sharepoint.com/f/a/HSEOPoliciesandDocuments/EmqxUJh5Qj6n1Gj4U1KX0le006zZYXRFduQz8PUNTLJH8dG?e=P7L8mml>.
If you have questions or need additional assistance, please submit a ticket with the helpdesk.

- Have a Quote available when creating Requisition.
- Enter Quote number and Quote description on Requisition.
- Verify Requisition does not exceed project budget.

Select an Option

Request Non-Catalog Items

Add a good or service that is not in the catalog

[Search Catalog](#)

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

- Requisition Currency** will default based on the Company selected on the previous screen.
- Select either **Request Goods** or **Request Service**.

For a Goods Requisition:

- Enter an **Item Description**, using as much detail as possible (including quote numbers and part numbers).
- Select a **Spend Category**.
- Select the **Supplier**.
- Enter a **Quantity**.
- Enter **Unit Cost**.
- Select **Each** for the **Unit of Measure**.

For Service Requisition:

- Enter an **Item Description**, using as much detail as possible (including quote numbers and services to be completed).
- Select a **Spend Category**.
- Select the **Supplier**.
- Enter a **Start Date**.
- Enter an **End Date**.

Create a Requisition

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19. Enter an **Extended Amount**.

Request Non-Catalog Items

Company: LE080 BWC Terminal Holdings LLC Requester: Allison Urbanowich Requisition Type: Services

Requisition Currency *

Non-Catalog Request Type

Request Goods
 Request Service

Service Request Details

Description *

Spend Category *

Supplier

Supplier Contract (empty)

Start Date

End Date

Extended Amount

Memo

Add to Cart Continue Shopping Cancel


20. Click the **Add to Cart** button.

21. The item is now in your cart.

22. Select the **View Cart**  icon.

23. From My Cart, select **Checkout**.

My Cart [View Cart](#)

 MagPark: Boat & Crew for Dock Inspections // CES
Quantity: 1 \$2,200.00

Checkout Total: 2,200.00 USD

Create a Requisition

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24. Click the **Errors and Alerts** at the top right of the screen to see what additional information needs to be entered.

The screenshot shows the 'Checkout' screen in Workday. At the top right, a red banner indicates '2 Errors and 1 Alert'. The requisition details are as follows:

Company	Requester	Requisition	Status	Total Amount
LE040 BWC Terminals LLC	Allison Urbanowich	- new -	Draft	5.00 USD

Below the details, there are sections for 'Shipping Address' and 'Requisition Information'. The 'Shipping Address' section includes 'Deliver-To: Corporate Office' and 'Ship-To Address: 1111 Bagby Street, Houston, TX 77002, United States of America'. The 'Requisition Information' section includes 'Request Date: 05/21/2023', 'Currency: USD', and 'Requisition Type'.

The message that displays shows that tax information and an attachment (the quote or email) is required. Close the message and proceed to enter the information.

The screenshot shows the 'Errors and Alerts' section. It lists the following errors and alerts:

- Errors**
 - 1. Page Error - Attachment is Required on Requisition (Requisition)
 - 2. Page Error - Tax Applicability Must be Selected and a Tax Code Must Be Selected with Taxable Sales/Purchases (Service Requisition Line)
- Alert**
 - 1. Page Alert - Delivery Date is Missing (Service Requisition Line)

25. Scroll to the bottom of the page to see the details for the line item.
 26. Scroll to the right within the line item to the Tax column and select the **Tax Applicability** and **Tax Code**.

The screenshot shows the 'Goods' section in Workday. A table is displayed with the following columns: 'Item Identifier', 'Item Identifiers', 'Packaging String', 'Tax', 'Tax Recoverability', and 'Memo'. The 'Tax' column is expanded, showing 'Tax Applicability' and 'Tax Code' dropdown menus. The 'Tax Applicability' dropdown is currently set to 'Search'. The 'Tax Code' dropdown is currently empty. A red banner at the top right indicates '2 Errors and 1 Alert'.

Create a Requisition

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27. Optional: In the Supplier column, enter a specific email contact in the **Order from Connection** field.

Unit Cost	Extended Amount	Order-To	Ship-To Address	Ship-To Contact	Requested Delivery Date	Supplier
10.00	10.00	Texas City	201 Dock Road Texas City, TX 77990 United States of America	Allison Urbanowich		Supplier: H.E.B. Order from Connection: [highlighted] Supplier Contract: [dropdown]
5.00	25.00	Texas City	201 Dock Road Texas City, TX 77990 United States of America	Allison Urbanowich		Supplier: H.E.B. Order from Connection: [dropdown] Supplier Contract: [dropdown]
2.00	10.00	Texas City	201 Dock Road Texas City, TX 77990 United States of America	Allison Urbanowich		Supplier: H.E.B. Order from Connection: [dropdown] Supplier Contract: [dropdown]

28. In the Attachments section, attach either the quote or email.
29. Click the **Submit** button.

Attachments

Drop files here

or

Select files

Submit Save for Later Continue Shopping ...

A message will display that you have submitted the requisition. There may be steps to check budget that populate. Requisitions will also need to be approved. The approval routing will depend on the type of requisition and dollar amount.

30. Click the > next to Details and Process to see the next steps in the process.

You have submitted

Requisition: 40REQ-10000025, Requester: [redacted] Date: 05/02/2023, Amount: \$2,200.00 [Alert]

Up Next

Check Budget (Financial) for Requisition - Batch/Job: Run Budget Check

> **Details and Process**

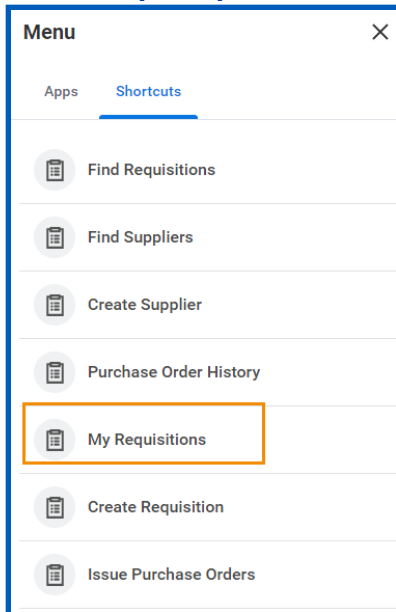
Create a Requisition

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View Your Requisitions

To view the status of your requisitions:

1. Select **My Requisitions** from your shortcuts.



2. Enter any criteria for which you want to search for your requisition if applicable.
3. Click the **OK** button.

Create a Requisition

Requisitions will now be created and submitted in Workday.

Your requisitions will display.

- Click one of the requisitions to drill into the details for that requisition.

Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders
40REQ-10000025	Services		05/02/2023	2,200.00	USD	COASTAL TERMINAL SERVICES	
40REQ-10000024	Supplies		05/01/2023	135.31	USD	COPPER STATE RUBBER SPECIALTIES COMPANY	

The details of the requisition will display, including the Status.

Create a Requisition

Requisitions will now be created and submitted in Workday.

View Requisition 40REQ-10000025 1 Alert

Budget Check Status: Not Required

Company: LE040 BWC Terminals LLC

Total Amount: 2,200.00 USD

Requester Employee: [redacted]

Status: In Progress

[View Exceptions](#)

Shipping Address

Deliver-To: Magnolia Park

Ship-To Address: 7600 J.W. Peavy Magnolia Park, TX 77011 United States of America

Requisition Information

Request Date: 05/02/2023

Currency: USD

Requisition Type: Services

High Priority: No

5. Scroll down to view additional details including Service Lines, Attachments, Balances, and Process History.

Submitted by: Allison Urbanowich

Consolidate Requisitions on Purchase Orders: No

Exclude Ship-To Address when Consolidating Requisition Lines: No

Memo to Suppliers: (empty)

Internal Memo: (empty)

Total Tax Amount: 0.00

[Add More](#)

1 Alert

Service Lines Attachments Balances Process History

Service Lines: 1 item

Line	Company	Item	Amount	Date
Q	LE040 BWC Terminals LLC	Item	Requested 2,200.00	Start Date 05/08/2023
		Description MagPark: Boat & Crew for Dock Inspections // CES	Ordered 0.00	End Date 05/12/2023
		Spend Category Inspection Services		

Approve Requisitions

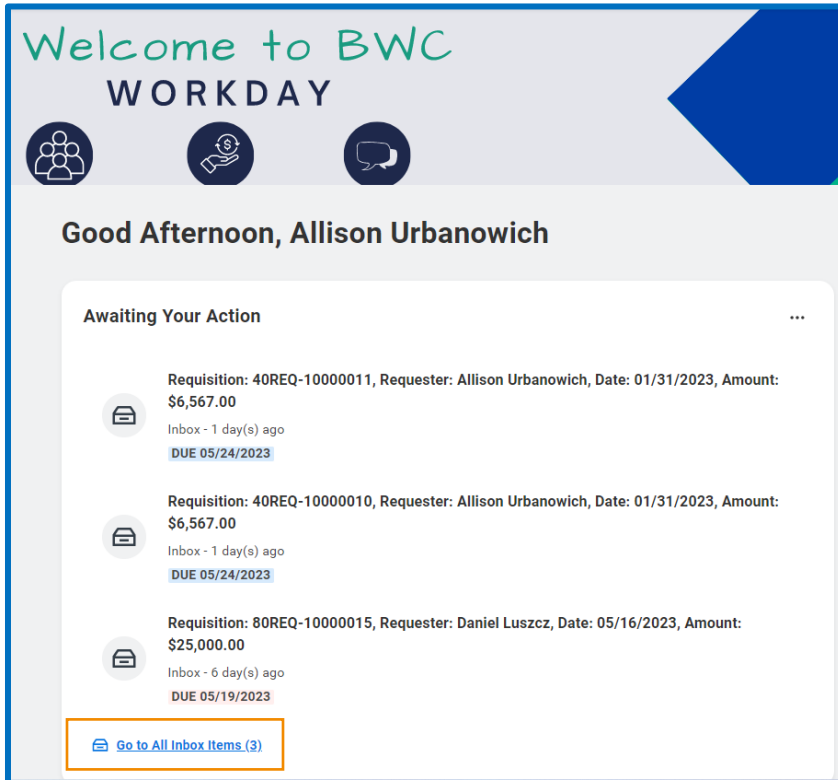
To approve requisitions:

1. The Home Screen has an Awaiting Your Action section with the most recent Workday requests showing.

Create a Requisition

Requisitions will now be created and submitted in Workday.

2. Click on Go to All Inbox Items or click on the Inbox icon in the upper right corner.



>Welcome to BWC
WORKDAY

Good Afternoon, Allison Urbanowich

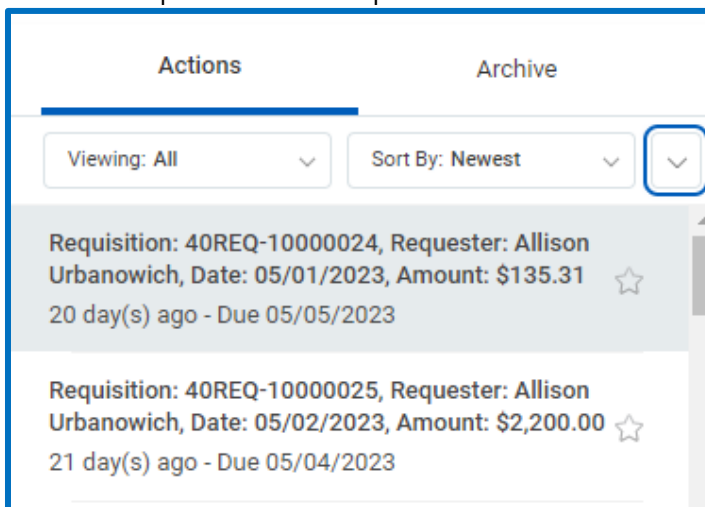
Awaiting Your Action

- Requisition: 40REQ-10000011, Requester: Allison Urbanowich, Date: 01/31/2023, Amount: \$6,567.00
Inbox - 1 day(s) ago
DUE 05/24/2023
- Requisition: 40REQ-10000010, Requester: Allison Urbanowich, Date: 01/31/2023, Amount: \$6,567.00
Inbox - 1 day(s) ago
DUE 05/24/2023
- Requisition: 80REQ-10000015, Requester: Daniel Luszcz, Date: 05/16/2023, Amount: \$25,000.00
Inbox - 6 day(s) ago
DUE 05/19/2023

[Go to All Inbox Items \(3\)](#)



3. The required Actions will be on the left side of the screen, with the most recent request at the top.



Actions Archive

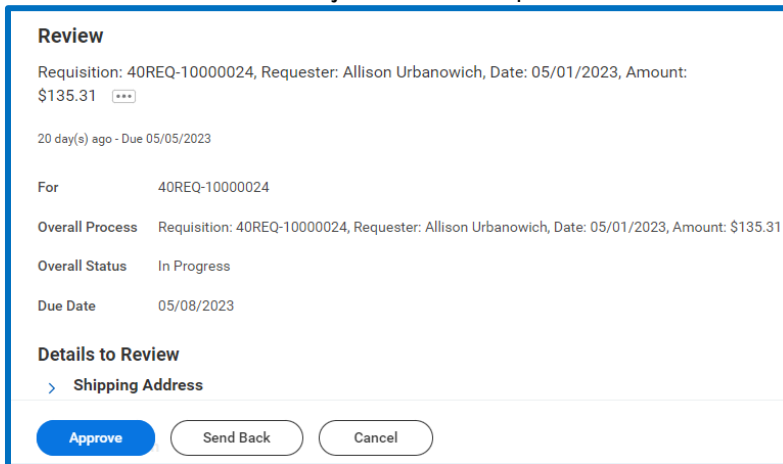
Viewing: All Sort By: Newest

- Requisition: 40REQ-10000024, Requester: Allison Urbanowich, Date: 05/01/2023, Amount: \$135.31
20 day(s) ago - Due 05/05/2023
- Requisition: 40REQ-10000025, Requester: Allison Urbanowich, Date: 05/02/2023, Amount: \$2,200.00
21 day(s) ago - Due 05/04/2023

Create a Requisition

Requisitions will now be created and submitted in Workday.

4. Click on the Requisition you want to review and scroll down to review all fields.
5. Click **Approve** at the bottom of the screen to send the Requisition to the next process step.
6. Click **Send Back** to reject the Requisition back to the Requisitioner.



Review

Requisition: 40REQ-10000024, Requester: Allison Urbanowich, Date: 05/01/2023, Amount: \$135.31

20 day(s) ago - Due 05/05/2023

For 40REQ-10000024

Overall Process Requisition: 40REQ-10000024, Requester: Allison Urbanowich, Date: 05/01/2023, Amount: \$135.31

Overall Status In Progress

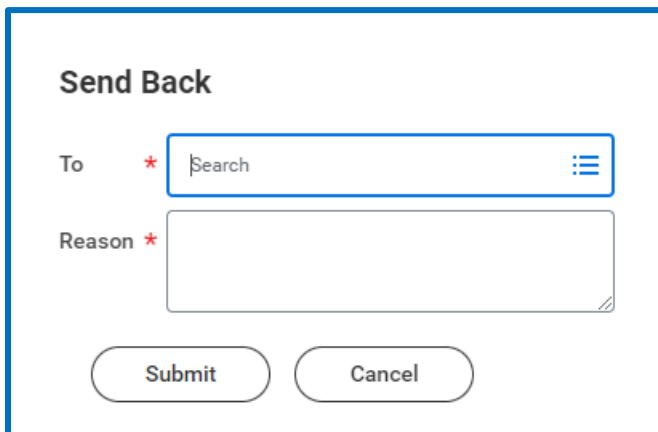
Due Date 05/08/2023

Details to Review

> Shipping Address

Approve **Send Back** **Cancel**

7. Select the person you want to send the requisition back to in the **To** field.
8. Please add comments explaining why the Requisition is rejected in the **Reason** field.
9. Click **Submit**.



Send Back

To *

Reason *

Submit **Cancel**

The requisition will be routed back to the person selected to make revisions as necessary.