Editing a Requisition in Workday

The requisition creator can use this tutorial to edit a requisition that has a status of either Draft or In Progress. Once edited, the requisition will need to all required approvals again. For additional deliveries of goods, create a new purchase requisition. Once a Purchase Order has been issued, an employee with the Department Procurement Data Entry Specialist (PDES) security role will need to initiate a Change Order.

http://workday.miami.edu

Find the Requisition and Check the Status

1. Log into Workday.  
   https://workday.miami.edu

2. Click the Purchases icon.

3. From the View section, click Requisitions.

4. Complete the search fields.  
   a. Document Date on or After – adjust to reflect how far back the req was created.
   b. Exclude Cancelled - Uncheck
   c. Exclude Closed - Uncheck

5. Click Ok.

Review the Requisition's Status, Edit, and Submit.

If no purchase order number appears, and the status is Draft or In Progress, then the requisition can be edited by clicking Edit Requisition.

Edit the fields and click Submit. All approvals will be required again.

Or, if a Purchase Order number appears, contact your Department Procurement Data Entry Specialist to initiate a change order.

To obtain the Security Role to process Change Orders

1. Complete the Security Role Request Form - Finance
2. Complete the top section:
   
   **TIP:** Position Number can be found in Workday by clicking the Profile icon, then Overview.

3. For Travel Card Access:
   Scroll down and check the box for Department Expense Data Entry Specialist.

   - Department Expense Data Entry Specialist

   For PCard Access:
   Scroll down and check the box for Department Procurement Data Entry Specialist.

4. Complete the fields for each section as needed:
   a. Type the cost center numbers that will need to be accessed for Closing Purchase Orders and initiating Change Orders.
   b. Type the end user's name that needs access.

5. Print and sign the document.

6. Scan and send to help@miami.edu for processing.

Example for both Department Expense Data Entry Specialist and Department Procurement Data Entry Specialist

<table>
<thead>
<tr>
<th>Department Expense Data Entry Specialist</th>
<th>Cost Center(s)</th>
<th>Print Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CCXXXXX</td>
<td>Michelle Roy</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Department Procurement Data Entry Specialist</th>
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</table>

This role initiates expense reports and spend authorizations on behalf of other employees. This role initiates check requests to non-employees to reimburse for expenses related to University activities, including travel to campus.

This role initiates PCard transaction reconciliations and purchase requisitions on behalf of other employees. This role initiates a check request to pay suppliers.