

Business Process Steps

Requisition Event (Default Definition)															
Effective Date	8/18/2026														
Notes	Creation of Purchase Requisition☐														
	COFA Approval path can be expanded if client has additional approvals and/or dollar thresholds via Cost Center Level x roles.														
	Leverage 'Configure Optional Fields' to require/hide fields in lieu of custom validations.														
Most Recent Used Date	8/18/2026														
Due Date	2 Weeks														
Security Group Restrictions															
Initiating Security Groups	Contingent Worker As Self														
	Employee As Self														
	Implementers														
Step Routing Restricted to	Requester for Requisition														
	Roles - Business Unit														
	Roles - Company														
	Roles - Cost Center														
	Roles - Custom/Financial														
	Roles - Fund														
	Roles - Gift														
	Roles - Grant														
	Roles - Location Hierarchy														
	Roles - Matrix														
	Roles - Program														
	Roles - Project														
	Roles - Project Hierarchy														
	Roles - Region														
	Roles - Requisition														
	Roles - Spend Category														
Business Process Steps															
Step		Order	If	Notes	Type	Specify	Optional	Group	Additional Information	Routing Modifier	All	Run As User	Due Date	Due Date Is Based On Effective Date	Complete
Requisition Event (Default Definition) step a - Initiation		a			Initiation		No								
Requisition Event (Default Definition) step b - Complete Questionnaire		b	Spend Category is Chemicals and Gases?	hazardous materials	Complete Questionnaire		No	Initiator					1 Day		
Requisition Event (Default Definition) step d - Complete Questionnaire		d	Requisition is over \$15,000?		Complete Questionnaire		No	Initiator							
			Spend Category is not 'Subaward Expenses'?												
Requisition Event (Default Definition) step e - Complete Questionnaire		e	Promotional items are purchased from an unlicensed supplier?	promotional items	Complete Questionnaire		No	Initiator					1 Day		
Requisition Event (Default Definition) step f - Action		f	FIN_No Current Assignee was Initiator or Prior Approver?		Action	Review Requisition	No	Cost Center Financial Specialist			Yes		1 Day		
			Worker possibly assigned next is not empty?												
Requisition Event (Default Definition) step g - Action		g	Requisition is not a Consignment Requisition Type? (Workday Owned)		Action	Check Budget	Yes	Initiator					1 Day		
Requisition Event (Default Definition) step h - Approval		h	Grant Expense?		Approval		No	Principal Investigator (Grant)	Restriction: Initiator, Approvers		Yes		1 Day		
			Validate Worktags = Y?												

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Requisition Event (Default Definition) step i - Approval		i	Gift Expense? Validate Worktags = Y?		Approval		No	Gift Manager	Restriction: Initiator, Approvers		Yes		1 Day		
Requisition Event (Default Definition) step j - Approval		j	Project is not Empty? Project not in NTID or Fabricated project hierarchies? Validate Worktags = Y?		Approval		No	Project Manager	Restriction: Initiator, Approvers		Yes		1 Day		
Requisition Event (Default Definition) step k - Approval		k	Spend Category is not promotional items? Worker possibly assigned next is not empty?		Approval		No	Spend Category Manager			Yes		1 Day		
Requisition Event (Default Definition) step l - Approval		l	Promotional items are purchased from an unlicensed supplier?		Approval		No	Spend Category Manager							
Requisition Event (Default Definition) step m - Approval		m	CCM Approval required if grant/gift/project is over \$10K (requisition)? Validate Worktags = Y?		Approval		No	Cost Center Manager	Restriction: Initiator, Approvers		Yes		1 Day		
Requisition Event (Default Definition) step n - Approval		n	Total requisition amount is over \$50,000? Validate Worktags = Y?		Approval		No	Cost Center Manager Level 2	Restriction: Initiator, Approvers		Yes		1 Day		
Requisition Event (Default Definition) step o - Approval		o	Total requisition amount is over \$200,000? Validate Worktags = Y?		Approval		No	Cost Center Manager Level 3	Restriction: Initiator, Approvers		Yes		1 Day		
Requisition Event (Default Definition) step p - Complete Questionnaire		p	Grant is subject to FFATA?		Complete Questionnaire		No	FFATA Reviewer							
Requisition Event (Default Definition) step q - Action		q	Requisition is not from a punchout catalog?		Action	Review Requisition	No	Spend Category Buyer					1 Day		
Requisition Event (Default Definition) step r - Approval		r	Requisition amount is greater than or equal to \$300,000?		Approval		No	Procurement Operations Lead					1 Day		
Requisition Event (Default Definition) step s - Approval		s	Requisition amount is greater than or equal to \$500,000?		Approval		No	Controller	Restriction: Initiator, Approvers				1 Day		
Requisition Event (Default Definition) step t - Approval		t	Requisition is greater than or equal to \$1 Million?		Approval		No	Senior Vice President Finance	Restriction: Initiator, Approvers				1 Day		
Requisition Event (Default Definition) step u - Approval		u	Requisition is over \$6.5 Million?		Approval		No	President	Restriction: Initiator, Approvers				1 Day		Yes
Requisition Event (Default Definition) step v - Action		v	Goods or Non-Project Service Category and Manually Sourced? Requisition has Goods or Services Lines to Source? (Workday Owned)		Action	Source Goods and Services Requisition	No	Spend Category Buyer					1 Day		