

## Capital Requisition

### Capital Planning Step 10



VUMC Users can create a Requisition for Capital Purchases for long-term fixed assets that can include purchasing machinery and equipment; land, buildings, or other infrastructure; furniture and fixtures; and software. Requests for capital must first be entered and approved within Capital Planning, where a Capital Request ID will be issued. This Capital Request ID is required for capital requisitions, in addition to a **Trackable Spend Category**, a **Project ID\***, and a **Location ID**. Follow the steps below to create a Capital Requisition in Workday.

#### From the Workday Homepage:

1. Select the **Menu** icon.
  2. Select the **Requisitions** App.
- Note:** If the **Requisitions** App is not visible, use the **+Add Apps** button to add the **Requisitions** App to your menu.
3. Select the **gear** icon.
  4. A new window will open. Under **Requisition Type**, select **Capital**.
  5. Under **Project**, enter the **Project ID\*** (PJ\_\_\_\_\_) that is tied to the Capital Request ID. The PJID\* is obtained through the Capital Planning process.

**Note:** The other required details will auto-populate based on the **Project ID\* Number**. You can edit any items or add relevant information by selecting the appropriate field(s). Items marked with a red asterisk (\*) are required.

6. Next, enter any applicable funding source worktags such as **Grant ID** and **Gift ID**.

7. Confirm **Cost Center ID** accuracy before reviewing other fields and selecting **Save**.

Use the documents for [Clinical Requisitions](#), [Non-Clinical Requisitions](#), and [Capital Requisition Spend Categories](#) to access the remaining process for completing a requisition.

#### Reminders:

1. For **Capital Requisitions**, enter the **Project ID\*** (PJ\_\_\_\_\_) first.
2. Next, enter any applicable funding source worktags such as **Grant ID** or **Gift ID**.
3. Confirm **Cost Center ID** is accurate.

The screenshot shows the 'Requisition Details' form in Workday. The form is titled 'Requisition Details' and includes a close button (X) in the top right corner. The form contains several fields with dropdown menus and text input areas. The fields are: 'Requesting for\*' (with a dropdown showing 'Warren Peace (1234567)'), 'Company\*' (with a dropdown showing 'Vanderbilt University Medical Center'), 'Requisition Type\*' (with a dropdown showing 'Capital'), 'Grant' (with a dropdown), 'Project' (with a dropdown showing 'Project: PJ00123 PERIOP RENOVATION PH1 (DNU)'), 'Gift' (with a dropdown), 'Program' (with a dropdown), 'Cost Center' (with a dropdown showing 'Cost Center: CC02579 VUH Capital: Direct to Sourcing'), and 'Fund' (with a dropdown showing 'Fund: FD001 General Fund'). At the bottom of the form are two buttons: 'Save' and 'Cancel'. Numbered callouts (1-7) are placed over the form to indicate the steps: 1. Menu icon, 2. Requisitions App, 3. Gear icon, 4. Requisition Type dropdown, 5. Project dropdown, 6. Grant and Gift dropdowns, 7. Cost Center dropdown.

\*Grant requisitions must use **PJ00150**