

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](#) and [Non-Clinical Requisitions](#) to access the remaining process for completing a requisition.

The screenshot shows the 'Requisition Details' form in Workday. It includes the following fields and callouts:

- 1:** MENU icon in the top navigation bar.
- 2:** Requisitions app icon in the navigation bar.
- 3:** Gear icon for settings in the app header.
- 4:** Requisition Type dropdown menu set to 'Capital'.
- 5:** Project dropdown menu set to 'Project: PJ00123 PERIOP RENOVATION PH1 (DNU)'.
- 6:** Grant and Gift dropdown menus.
- 7:** Cost Center dropdown menu set to 'Cost Center: CC02579 VUH Capital: Direct to Sourcing'.
- Fund:** Fund dropdown menu set to 'Fund: FD001 General Fund'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

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.

QUESTIONS?

Please email BusinessEducation@vumc.org.