# **ERP Job Aid** RI Enterprise Resource Planning



Amendment Types:

- Change
  - Add/Delete/Change a line item through the Catalog Load Workbook
     (Note: When you are amending a contract catalog, unless the other items are referenced on the catalog and are updated this will ONLY add new items)
- Extension
- Renewal
- Termination

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### Termination:

1. Using the Workday Search Bar, type Find Supplier Contracts and select the report.



2. Filter the Status field to Approved and select OK. (Note: This process may take a while to load as indicated by the loading symbol.)

| Find Supplier Contracts |               | × |
|-------------------------|---------------|---|
| Company                 | :=            | Î |
| Supplier                |               |   |
| Order-From Connection   |               |   |
| RIFANS Contract Number  |               |   |
| Supplier Contract       |               |   |
| MPA Number              |               |   |
| Catalogs                | :=            |   |
| Supplier Contract Type  |               |   |
| Status                  | × Approved := |   |
| Expiring in 30 Days?    |               |   |
| Discount Terms          |               | - |
|                         | Cancel OK     |   |

- 3. Locate the **Supplier Contract** you are initiating an Amendment to and select the related actions button next to the Supplier Contract title.
- 4. Hover over Supplier Contract and select Amend Supplier Contract.



Use the menu icon in the Amendment Type field and select Termination.
 (Note: This is a one-option field – enter additional reason/justification in the Amendment Description field.)

| <ul> <li>Amendment Information</li> </ul> |             |    |
|---|-------------|----|
| Amendment Type *                          | Search      | := |
| Amendment Date *                          | Change      |    |
|   | C Extension |    |
| Amendment Number                          | Renewal     |    |
|   | Termination |    |
| <ul> <li>Contract Information</li> </ul>  |             |    |

- 6. The Amendment Date defaults to todays date.
- 7. If applicable, enter the Amendment Number in the Amendment Number field.
- 8. Enter additional information to support the amendment type in the Amendment Description field.
- 9. Scroll to the Terms and Amounts heading.
- 10. Change the **End Date** to the appropriate termination date.

| <ul> <li>Terms and A</li> </ul> | mounts |   |
|---------------------------------|--------|---|
| Start Date                      | *      | Ē |
| Contract Signed Date            |        | Ē |
| End Date                        |        | Ē |

- 11. Scroll down the page and select the Services Lines tab.
- 12. Select the Add (+) icon to add a line.

(*Note:* This line is for Agency Routing Purposes **only** and will be deleted once routed to the Division of Purchases).

| Contract Participants Goods |             | Goods Lines | Service Lines |
|-----------------------------|-------------|-------------|---------------|
| Service Line                | s 0 items   |             | Contract Line |
|                             | Line Number |             |               |

13. Use horizontal scroll bar to fill in required fields.

- a. Line Number
- b. Description
  - i. Enter Description: For Agency Routing Purposes.
- c. Spend Category
- d. Extended Amount
  - i. Enter Extended Amount: \$0.01
- e. Fund
- f. Appropriation
- g. Source of Funds
- h. Additional Worktags
- 14. Scroll down the page and select the **Attachments** tab.
- 15. To provide an Attachment, select the arrow preceding > Attachments.
  - a. To upload a saved file from your device, select **Select Files**, and then follow your device instructions.
  - b. To select an Attachment Category, select the menu icon, and then make your selection.
  - c. To include the attachment on the resulting Supplier Contract for the Supplier to view, enter **External** in the **Comment** field.

(Note: To attach more documents, select Upload. To remove an attachment, select the trash can icon.

16. Select **Submit** to finalize the Amendment.

#### **Approval Process**

Once submitted, the change order follows an approval workflow.

#### Agency Requisitioner Confirmation:

- The Supplier Contract will now reflect **Terminated** status with a Version Number.
- View Supplier Contract Amendment under:
  - Attachments tab

| Contra  | t Participants Catalo                                    | og Items Amendments                  | Attachments | Process History |               |
|---------|--|--------------------------------------|-------------|-----------------|---------------|
| Attachn | ients  | -                                    |             |                 |               |
|         | Receipt.jpg  |                                      |             |                 | 3 weeks ago   |
|         | Attachment Category                                      | Administrative Fee Terms and ditions | d Con       |                 |               |
|         | Comment  | (empty)                              |             |                 |               |
| PDF     | Create a Requisition Guide<br>Uploaded by Alice Paolissi | .pdf<br>(01344)                      |             |                 | 5 minutes ago |
|         | Attachment Category                                      | Supporting Documentation             |             |                 |               |
|         | Comment  | (empty)                              |             |                 |               |
|         | 3915148_2025-05-30-12:4                                  | D:46_BIRT.pdf                        |             |                 | 3 minutes ago |
| PDF     | Attachment Category                                      | (empty)                              |             |                 |               |
|         | Comment  | (empty)                              |             |                 |               |
|         |  |                                      |             |                 |               |

# **Extension or Renewal:**

1. Using the Workday Search Bar, type Find Supplier Contracts and select the report.



Filter the Status field to Approved and select OK.
 (Note: This process may take a while to load as indicated by the loading symbol.)

| Find Supplier Contracts |               | × |
|-------------------------|---------------|---|
| Company                 | :=            | Î |
| Supplier                |               |   |
| Order-From Connection   |               |   |
| RIFANS Contract Number  |               |   |
| Supplier Contract       |               |   |
| MPA Number              |               |   |
| Catalogs                | :=            |   |
| Supplier Contract Type  |               |   |
| Status                  | × Approved := |   |
| Expiring in 30 Days?    |               |   |
| Discount Terms          | :=            | - |
|                         | Cancel OK     |   |

- 3. Locate the **Supplier Contract** you are initiating an Amendment to and select the related actions button next to the Supplier Contract title.
- 4. Hover over Supplier Contract and select Amend Supplier Contract.



 Use the menu icon in the Amendment Type field and select Extension or Renewal. (Note: This is a one-option field – enter additional reason/justification in the Amendment Description field.)

| <ul> <li>Amendment</li> </ul>            | Information   |   |
|--|---------------|---|
| Amendment Type *                         | Search        | ≔ |
| Amendment Date *                         | O Change      |   |
|  | C Extension   |   |
| Amendment Number                         | C Renewal     |   |
|  | O Termination |   |
| <ul> <li>Contract Information</li> </ul> |               |   |

- 6. The Amendment Date defaults to todays date.
- 7. If applicable, enter the Amendment Number in the Amendment Number field.
- 8. Enter additional information to support the amendment type in the Amendment Description field.
- 9. Scroll to the Terms and Amounts heading.
- 10. Change the **End Date** to the appropriate extension or renewal date.

| <ul> <li>Terms and Amounts</li> </ul> |   |   |
|---------------------------------------|---|---|
| Start Date                            | * | Ē |
| Contract Signed Date                  |   | Ē |
| End Date                              |   | Ē |

11. Scroll down the page and select the Services Lines tab.

#### 12. Select the Add (+) icon to add a line.

(*Note:* This line is for Agency Routing Purposes **only** and will be deleted once routed to the Division of Purchases).

| Contract Participants Goods Lines |              | Service Lines |               |
|-----------------------------------|--------------|---------------|---------------|
| Service Line                      | s Oitems     |               |               |
| (+)                               | *Line Number |               | Contract Line |

- 13. Use horizontal scroll bar to fill in required fields.
  - a. Line Number
  - b. Description
    - i. Enter Description: For Agency Routing Purposes.
  - c. Spend Category
  - d. Extended Amount
    - i. Enter Extended Amount: \$0.01
  - e. Fund
  - f. Appropriation
  - g. Source of Funds
  - h. Additional Worktags
- 14. Scroll down the page and select the **Attachments** tab.
- 15. To provide an Attachment, select the arrow preceding > Attachments.
  - a. To upload a saved file from your device, select **Select Files**, and then follow your device instructions.
  - b. To select an Attachment Category, select the menu icon, and then make your selection.
  - c. To include the attachment on the resulting Supplier Contract for the Supplier to view, enter **External** in the **Comment** field.

(Note: To attach more documents, select **Upload.** To remove an attachment, select the trash can icon.

16. Select **Submit** to finalize the Amendment.

#### **Approval Process**

Once submitted, the change order follows an approval workflow.

#### Agency Requisitioner Confirmation:

- The Supplier Contract will now reflect **Approved** status with a **Version Number**.
- View Supplier Contract Amendment under:
  - Attachments tab

| Contrac | t Participants Catalo                                    | og Items Amendments                    | Attachments | Process History |               |
|---------|--|--|-------------|-----------------|---------------|
| Attachm | ents   |  |             |                 |               |
|         | Receipt.jpg  |  |             |                 | 3 weeks ago   |
|         | Attachment Category                                      | Administrative Fee Terms ar<br>ditions | nd Con      |                 |               |
|         | Comment  | (empty)                                |             |                 |               |
| PDF     | Create a Requisition Guide<br>Uploaded by Alice Paolissi | pdf<br>(01344)                         |             |                 | 5 minutes ago |
|         | Attachment Category                                      | Supporting Documentation               |             |                 |               |
|         | Comment  | (empty)                                |             |                 |               |
|         | 3915148_2025-05-30-12:4                                  | 0:46_BIRT.pdf                          |             |                 | 3 minutes ago |
| PDF     | Attachment Category                                      | (empty)                                |             |                 |               |
|         | Comment  | (empty)                                |             |                 |               |

# Change:

(Note: If this is a change to the Contract Catalog you must first update the Catalog Load spreadsheet with the changes you would like to make: Add, Delete, or Change a line item.)

(*Note*: When you are amending a contract catalog, unless the other items are referenced on the catalog and are updated this will ONLY add new items)

1. Using the Workday Search Bar, type Find Supplier Contracts and select the report.

| Q | Find Supplier Contracts  |
|---|--|
| 1 | Find Supplier Contracts<br>Report  |
| 1 | Find Supplier Contracts with Incorrect Obligation journal amounts<br>Report                              |
|   | Find Supplier Contracts that are Multi-currency matching Criteria for<br>Incorrect Obligations<br>Report |
| Ē | SRI - Find Supplier Contracts<br>Report  |
|   | Find Supplier Contacts<br>Report   |
|   | View More  |
| • | •  |

# Filter the Status field to Approved and select OK. (Note: This process may take a while to load as indicated by the loading symbol.)

| Find Supplier Contracts |              | ×  |
|-------------------------|--------------|----|
| Company                 | :=           |    |
| Supplier                | :=           | ]  |
| Order-From Connection   | :=           | ]  |
| RIFANS Contract Number  |              | ]  |
| Supplier Contract       |              | ]  |
| MPA Number              |              |    |
| Catalogs                |              | ]  |
| Supplier Contract Type  | :=           | ]  |
| Status                  | × Approved 🗄 | ]  |
| Expiring in 30 Days?    |              |    |
| Discount Terms          | [ ∷≡         | _  |
|                         | Cancel       | ок |

- 3. Locate the **Supplier Contract** you are initiating an Amendment to and select the related actions button next to the Supplier Contract title.
- 4. Hover over Supplier Contract and select Amend Supplier Contract.



Use the menu icon in the Amendment Type field and select Change.
 (Note: This is a one-option field – enter additional reason/justification in the Amendment Description field.)

| <ul> <li>Amendment Information</li> </ul> |               |  |  |
|---|---------------|--|--|
| Amendment Type *                          | Search :≡     |  |  |
| Amendment Date *                          | Change        |  |  |
|   | C Extension   |  |  |
| Amendment Number                          | O Renewal     |  |  |
|   | C Termination |  |  |
| <ul> <li>Contract Information</li> </ul>  |               |  |  |

- 6. The Amendment Date defaults to todays date.
- 7. If applicable, enter the Amendment Number in the Amendment Number field.
- 8. Enter additional information to support the amendment type in the Amendment Description field.
- 9. Scroll to the Terms and Amounts heading.
- 10. Change the **Total Contract Amount** to the appropriate Contract Amount as applicable.

| <ul> <li>Terms and Amounts</li> </ul> |              |  |
|---------------------------------------|--------------|--|
| Start Date                            | 07/01/2024   |  |
| Contract Signed Date                  | 06/28/2024   |  |
| End Date                              | 06/30/2028   |  |
| Total Contract Amount                 | 1,500,000.00 |  |
| Original Contract Amount              | 1,500,000.00 |  |

11. Scroll down the page and select the Services Lines tab.

12. Select the Add (+) icon to add a line.

(*Note:* This line is for Agency Routing Purposes **only** and will be deleted once routed to the Division of Purchases).

| Contract              | Participants | Goods Lines | Service Lines |  |
|-----------------------|--------------|-------------|---------------|--|
| Service Lines 0 items |              |             |               |  |
| +                     | *Line Number |             | Contract Line |  |
|                       |              |             |               |  |

13. Use horizontal scroll bar to fill in required fields.

- a. Line Number
- b. Description
  - i. Enter Description: For Agency Routing Purposes.
- c. Spend Category
- d. Extended Amount
  - i. Enter Extended Amount: \$0.01
- e. Fund
- f. Appropriation
- g. Source of Funds
- h. Additional Worktags
- 14. Scroll down the page and select the **Attachments** tab.

(*Note*: If you are updating the *Catalog* you will need to upload the revised catalog and select the Attachment Category *Catalog*.)

- 15. To provide an Attachment, select the arrow preceding > Attachments.
  - a. To upload a saved file from your device, select **Select Files**, and then follow your device instructions.
  - b. To select an Attachment Category, select the menu icon, and then make your selection.
  - c. To include the attachment on the resulting Supplier Contract for the Supplier to view, enter **External** in the **Comment** field.

(Note: To attach more documents, select **Upload.** To remove an attachment, select the trash can icon.

16. Select **Submit** to finalize the Amendment.

#### **Approval Process**

Once submitted, the change order follows an approval workflow.

### Agency Requisitioner Confirmation:

- The Supplier Contract will now reflect **Approved** status with a **Version Number**.
- View Supplier Contract Amendment under:
  - Attachments tab

| Contra                               | ct Participants Catal  | log Items Amendments Attachments Process History |             |  |  |  |  |
|--------------------------------------|--|--|-------------|--|--|--|--|
| Attachr                              | Attachments  |  |             |  |  |  |  |
|                                      | Receipt.jpg  |  | 3 weeks ago |  |  |  |  |
|                                      | Attachment Category  | Administrative Fee Terms and Con<br>ditions      |             |  |  |  |  |
|                                      | Comment  | (empty)  |             |  |  |  |  |
| PDF                                  | Create a Requisition Guide.pdf<br>Uploaded by Alice Paolissi (01344) 5 minut |  |             |  |  |  |  |
|                                      | Attachment Category  | Supporting Documentation                         |             |  |  |  |  |
|                                      | Comment  | (empty)  |             |  |  |  |  |
| 3915148_2025.05:30-12:40:46_BIRT.pdf |  | 3 minutes ago                                    |             |  |  |  |  |
| PDF                                  | Attachment Category  | (empty)  |             |  |  |  |  |
|                                      | Comment  | (empty)  |             |  |  |  |  |