ERP Job Aid
RI Enterprise Resource Planning

Requisition Types

- **Arch Eng & Consultant (less than $20k)**
  - **Requisition Use:** For requisitions under $20,000 involving Architects, Engineers, and Consultants, the AEC justification form and three quotes are required. The form must be signed by the Chief Procurement Officer. Before initiating the AEC process, determine whether the service needed can be fulfilled through an MPA mini-bid utilizing MPA-494: Architectural Services or MPA-584: Engineering Services.
  - **Minimum Required Attachments:** To complete the requisition, the following attachments are mandatory:
    - AE&C Justification Form
    - 3 Quotes
- **Delegated Authority**
  - **Requisition Use:** This requisition type is specifically designated for Delegated Authority and may only be used for approved procurements. Authorization is restricted to procurement activities that the Chief Purchasing Officer or Director of Administration has formally approved in writing, granting the Agency the authority to carry out the specified procurement processes.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Delegated Authority Approval Letter
    - Quote
- **Disaster Recovery**
  - **Requisition Use:** This requisition type is exclusively for declared disasters and associated recovery efforts. It is not intended for single-use emergencies; refer to the “Emergency” requisition type and its procedures for such situations. If you require clarification, consult your CFO for further guidance.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Supporting Documentation
- **Emergency**
  - **Requisition Use:** This requisition type is designated for limited use in emergency procurements necessary to address immediate threats to public health, welfare, or safety; critical equipment failures; or risks to property and essential operations. Prior written emergency authorization must be obtained from the State Purchasing Agent or a Deputy Purchasing Agent before proceeding with the procurement.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Emergency Email Authorization
    - Supporting Documentation
- **Grant**

- **Requisition Use:** This requisition type is designated for Grants requiring a Purchase Order. If you are unsure whether this requisition applies to your grant, contact your CFO or the Grants Management Office for guidance on the appropriate system to use.
- **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
  - Supporting Documentation

- **Lease Equipment**
  - **Requisition Use:** This requisition type is designated for any negotiated leases for equipment.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Supporting Documentation
- **Lease Property/Land**
  - **Requisition Use:** This requisition type is designated for any negotiated leases for property or land. This may require approval from the State Properties Committee.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Supporting Documentation
- **Leg Grant**
  - **Requisition Use:** This requisition type is intended for limited use in processing approved Legislative Leg Grants and requires a Purchase Order. If you are uncertain, please consult your CFO or the Leg Grants Management team for further guidance.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Supporting Documentation
- **MPA Mini Bid**
  - **Requisition Use:** This requisition type is designated for Master Price Agreement (MPA) Mini Bids conducted at the agency. Please ensure that the supporting documentation for the mini-bid, including details of the recommended vendor selected for the award, is attached.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - SOW Email with Vendor Responses
    - Tentative Selection Documentation
- **Other**
  - **Requisition Use:** The 'Other' requisition type should be used sparingly, as agencies are encouraged to select a specific requisition type whenever possible. If you are unsure which requisition type to use, please consult your CFO for guidance. The Division of Purchases will reject your requisition if a more appropriate requisition type is available. Acceptable uses for the 'Other' requisition type include miscellaneous expenses, subscriptions, and vehicle acquisitions.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Supporting Documentation
- **Other – Under $500**
  - **Requisition Use:** This requisition type is designated for "Other" transactions under $500 and is intended for limited use. P-Cards should be the primary method of payment for small

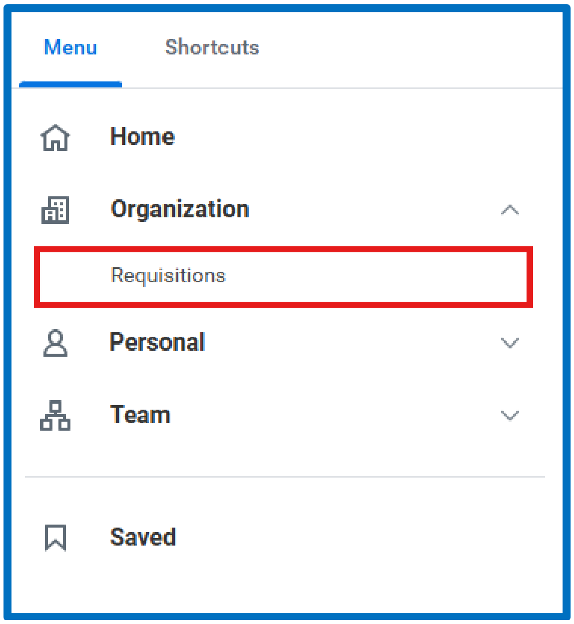
transactions. However, for purchases requiring a Purchase Order, this requisition may be used. Examples of applicable transactions include:
    - Catering for an event with a required attendee list.
    - Small grant-related expenses.
  - **Minimum Required Attachments: To complete the requisition, the following attachment is mandatory:**
    - Supporting Documentation
- **Request for Legal Counsel**
  - **Requisition Use:** This requisition type is designated exclusively for the procurement of Legal Counsel and requires an approved Letter of Engagement. General legal services should be processed under alternative requisition types. If you are uncertain about the appropriate requisition type, please consult with your CFO for guidance.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - RLC Approved form w/Letter of Engagement
    - Exempt Justification
- **Single/Sole Source**
  - **Requisition Use:** This requisition type is designated for Single/Sole Source vendors and requires review and approval by the Division of Purchases.
  - **Minimum Required Attachments:** To complete the requisition, the following attachment is mandatory:
    - Single/Sole Source Justification Form
    - Quote
- **Small Purchases Delegated Authority**
  - **Requisition Use:** This requisition type is designated for Small Purchases Delegated Authority (SPDA) and applies to the procurement of goods and services valued between $500 and $10,000. It is available for use by all agencies and requires a three-quote process along with a fully approved justification form. For construction-related goods and services, please utilize the "Small Purchases Delegated Authority – Construction" requisition, as the applicable threshold differs.
  - **Minimum Required Attachments:** To complete the requisition, the following attachments are mandatory:
    - SPDA Justification Form
    - Quote
    - Quote 2
    - Quote 3
- **Small Purchases Delegated Authority – Construction**
  - **Requisition Use:** This requisition is designated for Small Purchases Delegated Authority (SDPA) in Construction within the $500-$25,000 threshold. It is available for all agencies and requires the following:
    - A three-quote process to ensure competitive pricing.
    - A fully approved justification form to document the purchase.
  - **Minimum Required Attachments:** To complete the requisition, the following attachments are mandatory:
    - SPDA Justification Form
    - Quote

        - Quote 2
        - Quote 3
- **Solicitation**
    - **Requisition Use:** This requisition facilitates the engagement of Purchases to publicly issue a competitive solicitation. Before proceeding with a competitive solicitation, consider whether an MPA Mini Bid or Small Purchases Delegated Authority may fulfill the required service within the established thresholds.
    - **Minimum Required Attachments:** To complete the requisition, the following attachments are mandatory:
        - Supporting Documentation

Table of Contents

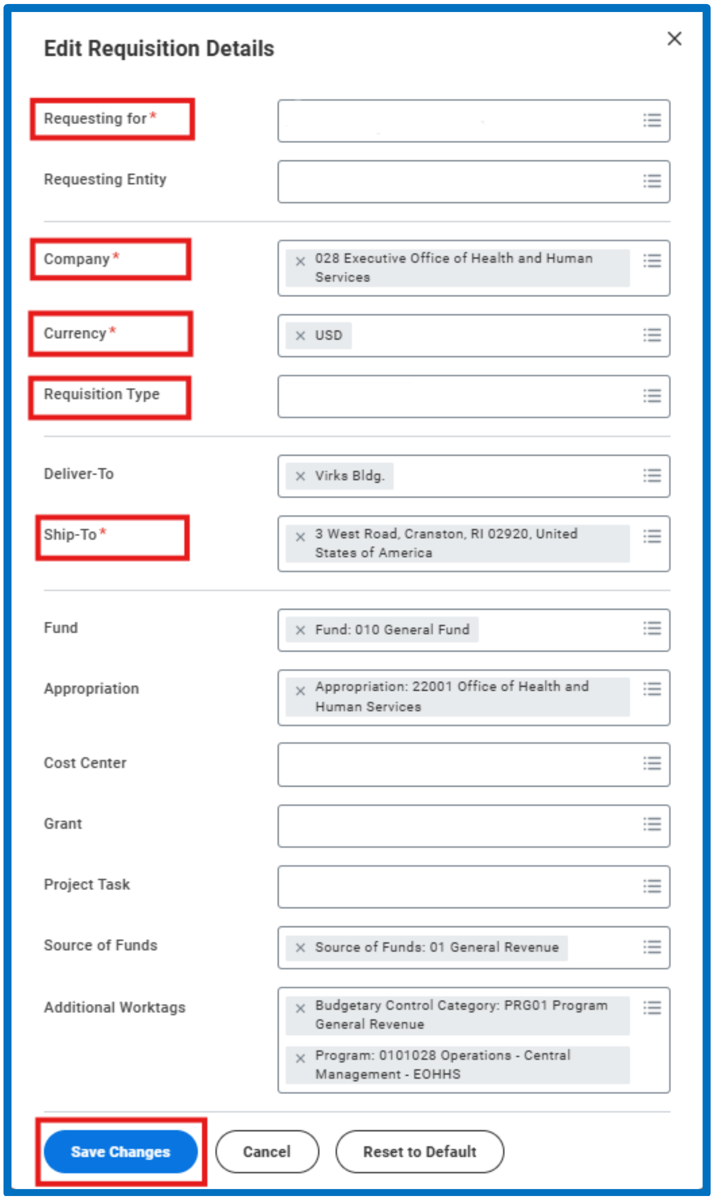
Process for Submitting a Requisition to Purchase Order

1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
2. Under Organization, select Requisitions
   (**Note:** *If the 'Requisitions' app is not listed in your **Menu,** select **(+) Add** > type 'Requisitions' in the **Find Apps** field > select the plus-sign > select **Back to Menu.**)*



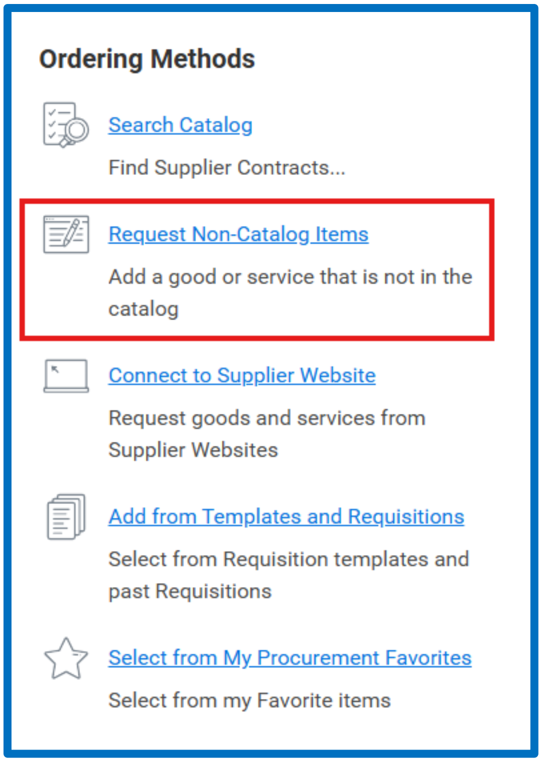
Requisition Details

3. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details,** select **Edit Details.**
4. The **Requesting for** name defaults to your name. To select a different **Requesting for** name, type in a name, select enter to search, and then make your selection.
5. **Company** name defaults to your **Company.**
6. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies,** and then making your selection.
7. To select a **Requisition Type,** select the menu icon, and then select your requisition type.
   (**Note:** *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.)*
8. Select **Save Changes.**
   (**Note:** *Required fields are indicated by a red asterisk.)*



Ordering Methods

9. Under the heading, **Ordering Methods**, select **Request Non-Catalog Items**.

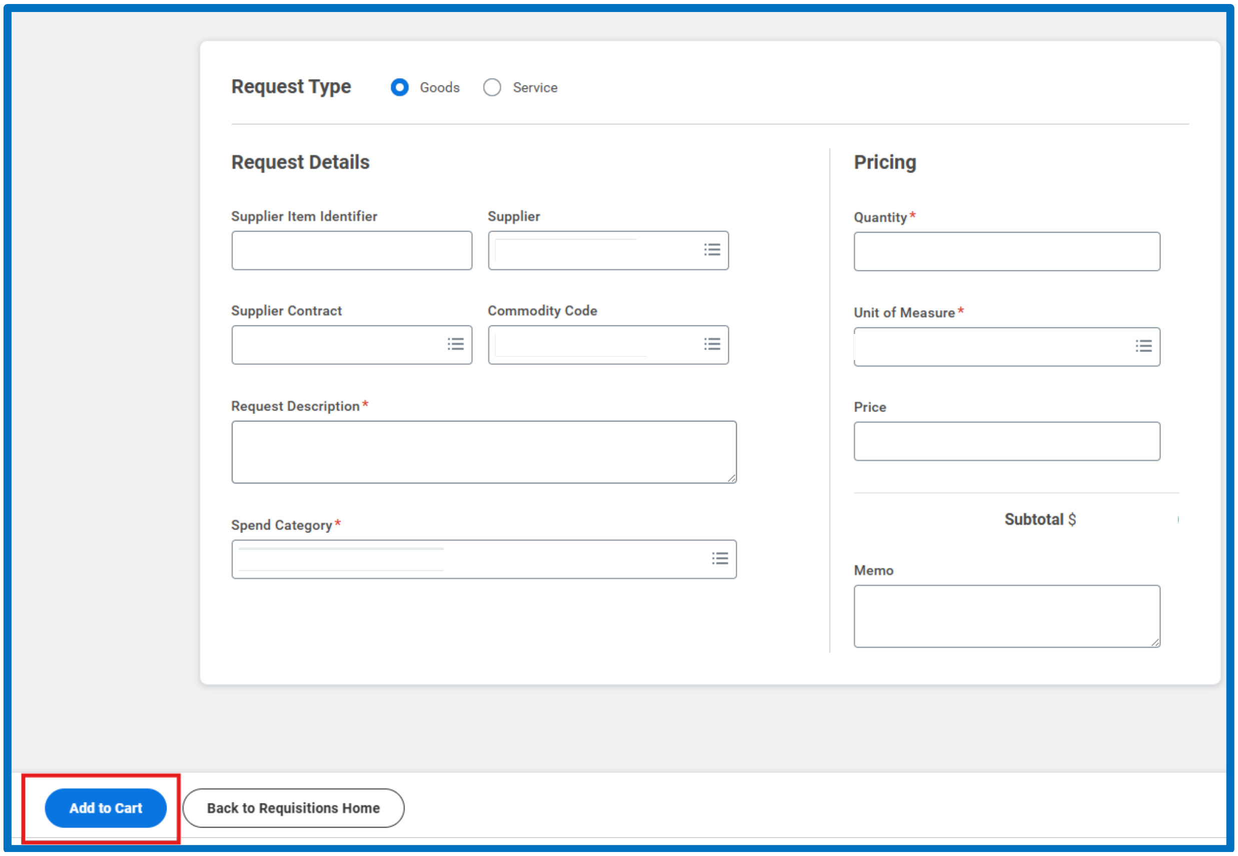


Request Type

10. Specify whether this request type is a **Goods** item or a **Service.**

Request Details

11. Under the heading **Request Details,** to select a **Supplier**, select the menu icon, select **Suppliers by Supplier Group,** select a group, and then make your selection.
    (**Note:** *Alternatively, type in a* ***Supplier,*** *select* enter *to search, and then make your selection from the search results.)*
12. To select a **Commodity Code**, select the menu icon, select **Commodity Code by Type,** select UNSPSC, and then make your selection.
    (Note: *By selecting a* ***Commodity Code*** *the field* ***Spend Category*** *will auto populate.)*
13. To specify **what you need,** type in a **Description.**
14. Type in a **Quantity.**
15. Type in a **Unit of Measure.**
16. Type in a **Price.**
    (**Note:** *Please enter numbers only, no dollar signs.)*
17. Optionally, type a comment in the **Memo** field.
18. Select **Add to Cart.**



19. To add more items to the cart, type in **What you need to order** for the second item and repeat the steps above. Otherwise, if finished, select the shopping cart icon in the upper right corner.
(**Note:** *To start a new requisition, and to search and select more goods or services, select **Edit Details**, and repeat the steps above.)*

20. Review the contents of the cart, and once ready, select **Checkout.**
(**Note:** *An error message may generate to remind you that an attachment is required.)*

Requisition Information

21. Review, and if necessary, edit the **Request Date.**
22. Review, and if necessary, edit **Currency.**
23. Review, and if necessary, edit **Requisition Type,** and then scroll down.
(**Note:** *Required fields are indicated by a red asterisk.)*

Goods

24. Under the heading, **Goods,** review the information that you entered and then, if necessary, edit.
(**Note:** *To add a new row, for additional Goods, select the plus sign icon. To remove a row, select the minus-sign icon.)*
(**Note:** *You may need to use the horizontal scroll bar to view the entire row.)*
25. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
26. Select the menu icon and make your selection.
27. Use the horizontal scroll bar to navigate to the **Appropriation** field.
28. To specify an **Appropriation**, type in an **Appropriation** and then select *enter* to search.
(**Note:** *Alternatively, select the menu icon, select **Active Appropriations by Appropriation Hierarchy**, select an Appropriations Hierarchy, and then continue selecting options to ultimately make your selection. (For example, select Active Appropriations by Appropriation Hierarchy > SORI Appropriation > Education > 026 Rhode Island Council on the Arts > 31002 Film Commission.)*
(**Note:** *Once an **Appropriation** is selected, the **Fund** may automatically populate even if you entered a different **Fund** prior to selecting an **Appropriation**. Once an **Appropriation** is selected, **Program** and **Source of Funds** may also automatically populate.)*

(**Note:** *Alternatively, to select an* ***Appropriation****, select the menu icon, then, if available, select* ***My Worktags,*** *and then make your selection.)*

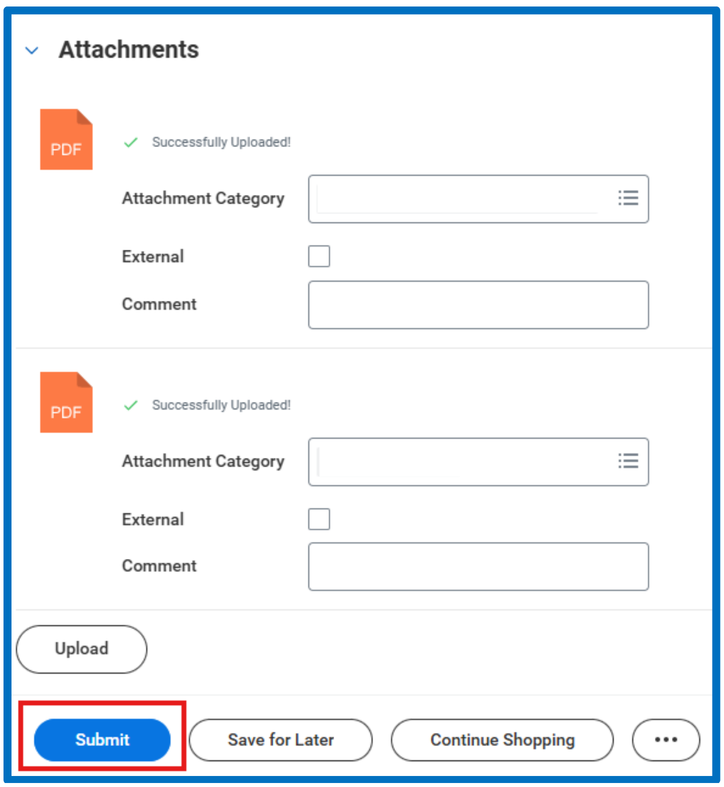
29. If applicable, to select a **Cost Center** select the menu icon, select **Active Cost Centers**, and then make your selection.
(**Note:** *Alternatively, type in the name or number of a* ***Cost Center*** *and then select* enter *to search.)*
30. If the **Source of Funds** did not automatically populate from the **Appropriation** selected above, to specify a **Source of Funds,** select the menu icon, and then make your selection.

Attachments

31. 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 Purchase Order for the Supplier to view, select the **External** checkbox.
    d. Optionally, type in a **Comment.**

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

32. Select **Submit.**

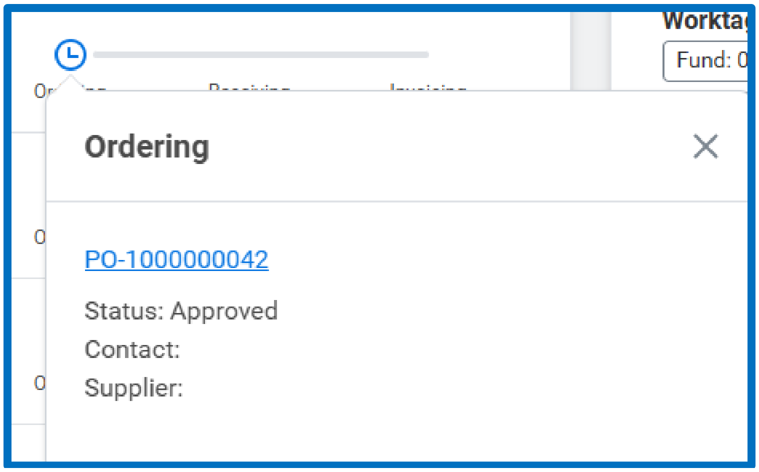


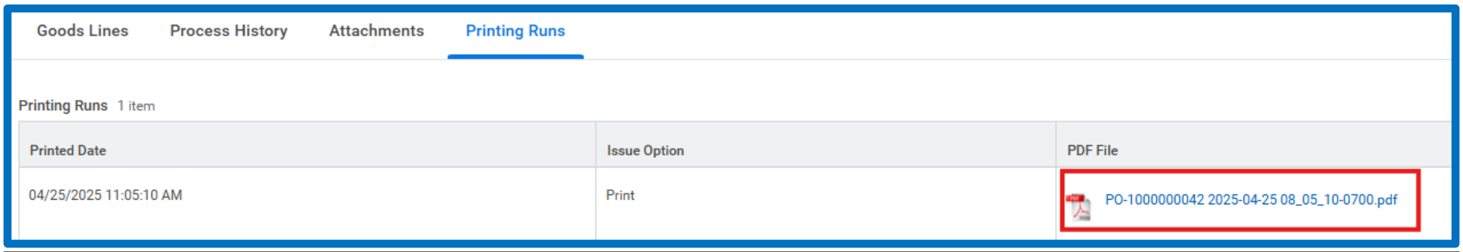
Approval Process

Once submitted, your requisition follows an approval workflow and route to the Division of Purchases for Purchase Order creation.

Final Steps

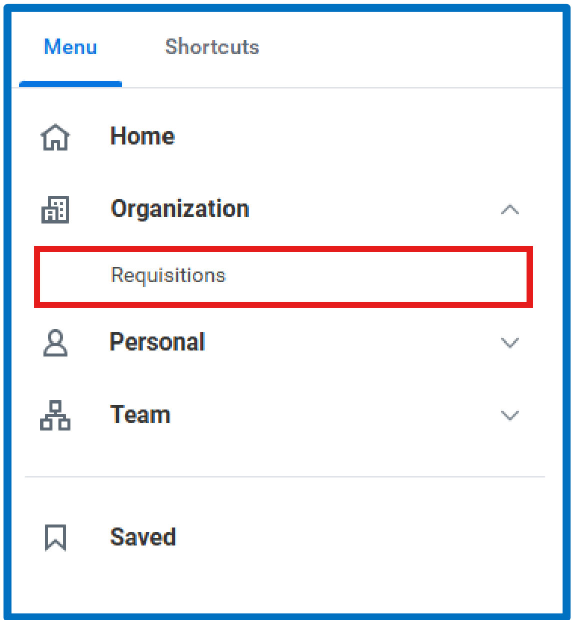
- To view the **Purchase Order Number**, return to the **Requisitions** page and select the icon next to **Ordering**. Select **Printing Runs** to see the **Printed Purchase Order.**
(**Note:** *Alternatively, if the* ***External*** *checkbox was selected for an attachment, select the* ***Attachments*** *tab, then, select the attachment title ending with* ***_Merged.pdf****)*


Workta
Fund: 0
Ordering
PO-1000000042
Status: Approved
Contact:
Supplier:


Goods Lines
Process History
Attachments
Printing Runs
Printing Runs 1 item
Printed Date
Issue Option
PDF File
04/25/2025 11:05:10 AM
Print
PO-1000000042 2025-04-25 08_05_10-0700.pdf

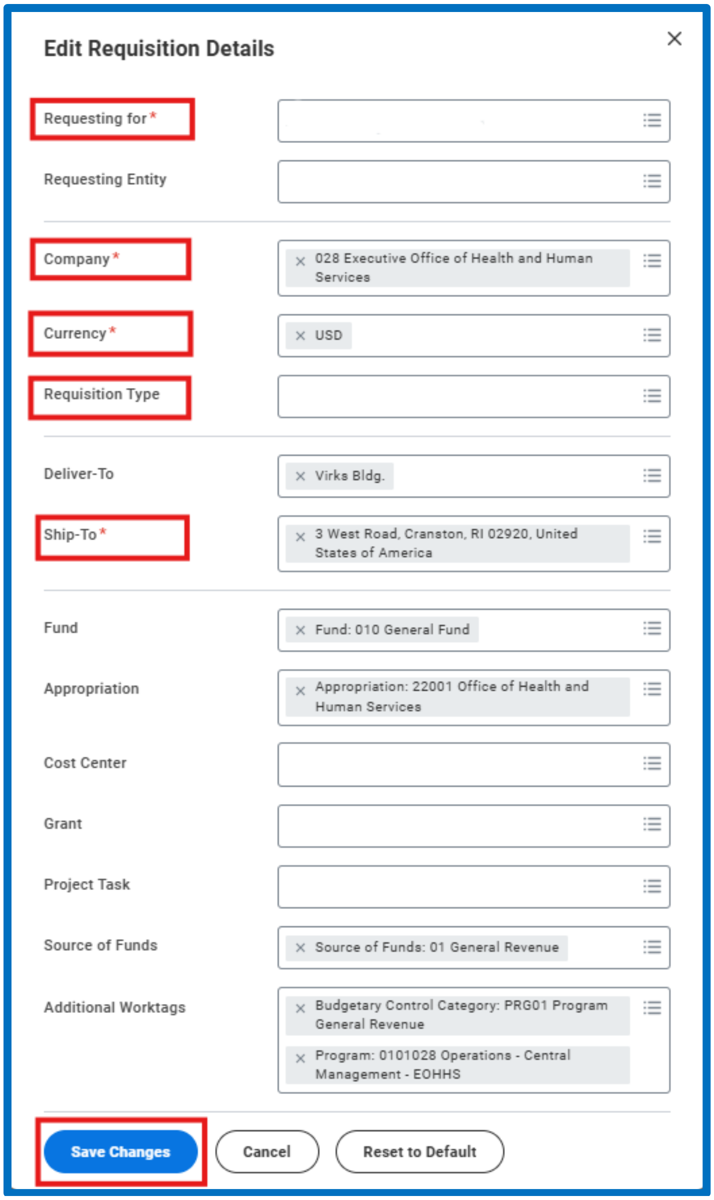
Process for Submitting a Requisition to Contract

1. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
2. Under Organization, select Requisitions
   (**Note:** *If the 'Requisitions' app is not listed in your* ***Menu****, select* ***(+) Add*** *> type 'Requisitions' in the* ***Find Apps*** *field > select the plus-sign > select* ***Back to Menu****.)*



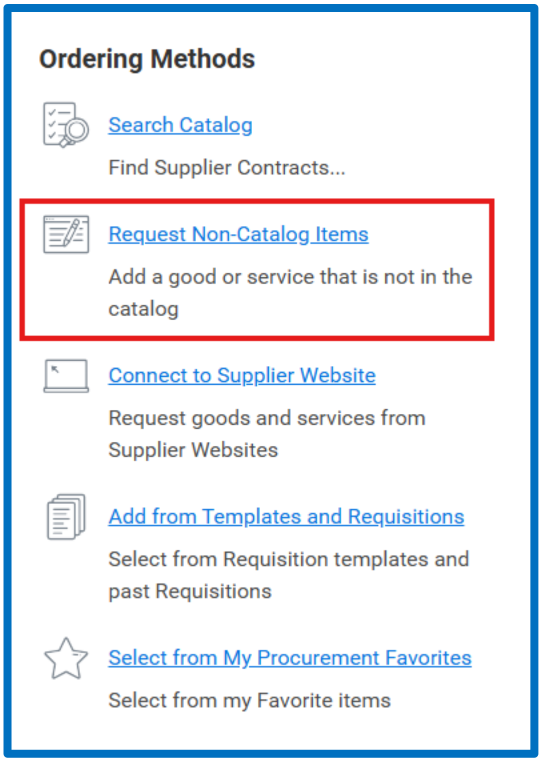
Requisition Details

3. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details,** select **Edit Details.**
4. The **Requesting for** name defaults to your name. To select a different **Requesting for** name, type in a name, select enter to search, and then make your selection.
5. **Company** name defaults to your **Company**.
6. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies**, and then making your selection.
7. To select a **Requisition Type,** select the menu icon, and then select your requisition type.
   (**Note:** *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.)*
8. Select **Save Changes.**
   (**Note**: *Required fields are indicated by a red asterisk.)*



Ordering Methods

9. Under the heading, **Ordering Methods,** select **Request Non-Catalog Items.**

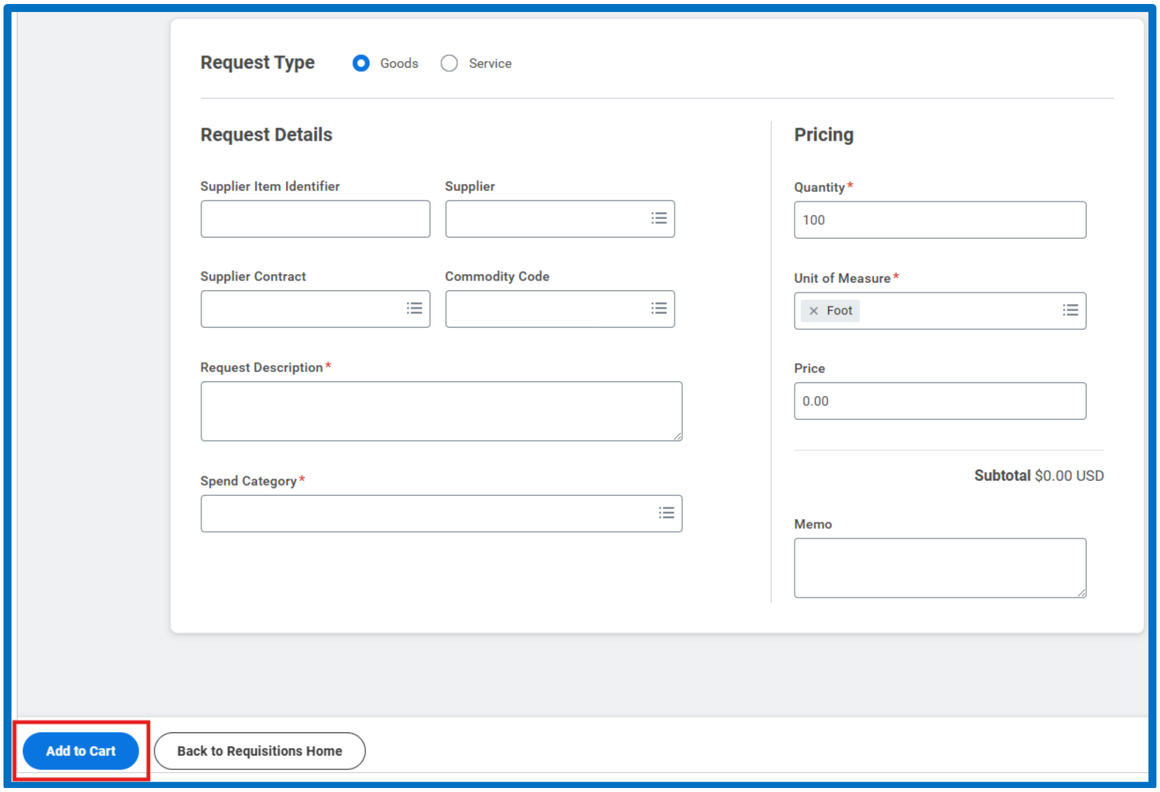


Request Type

10. Specify whether this request type is a **Goods** item or a **Service.**

Request Details

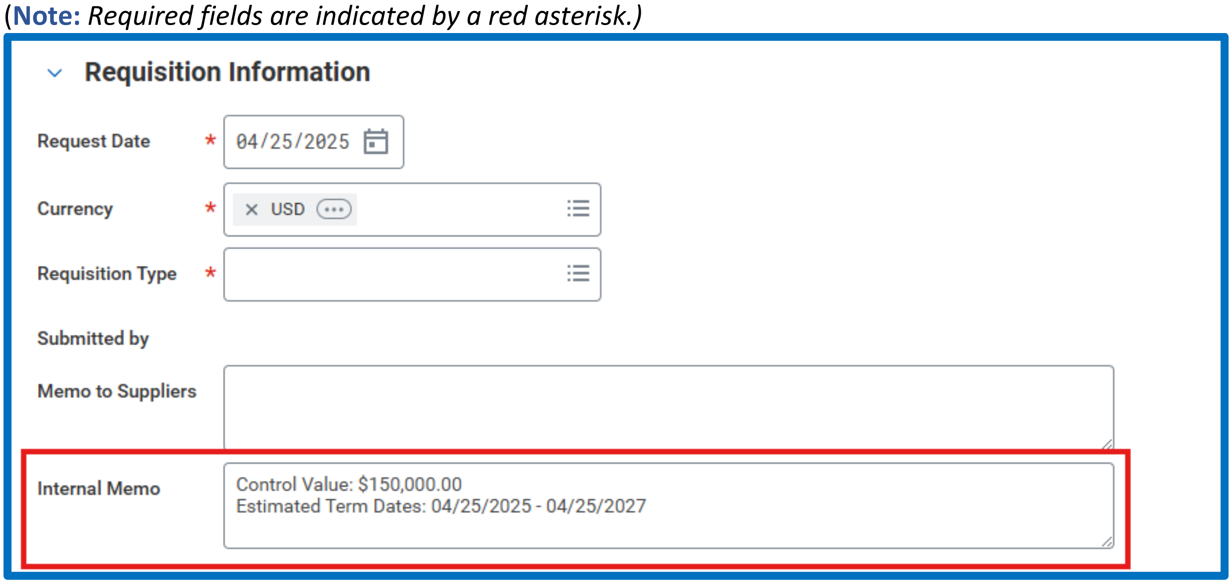
11. Under the heading **Request Details,** to select a **Supplier**, select the menu icon, select **Suppliers by Supplier Group,** select a group, and then make your selection.
    (**Note:** *Alternatively, type in a* ***Supplier,*** *select* enter *to search, and then make your selection from the search results.)*
12. To select a **Commodity Code**, select the menu icon, select **Commodity Code by Type,** select UNSPSC, and then make your selection.
    (Note: *By selecting a* ***Commodity Code*** *the field* ***Spend Category*** *will auto populate.)*
13. To specify **what you need,** type in a **Description.**
14. Type in a **Quantity.**
15. Type in a **Unit of Measure.**
16. Type in a **Price** as $0.00.
    (**Note:** *Please enter numbers only, no dollar signs.)*
17. Optionally, type a comment in the **Memo** field.
18. Select **Add to Cart.**



19. Review the contents of the cart, and once ready, select **Checkout.**
    (**Note:** *An error message may generate to remind you that an attachment is required.)*

Requisition Information

20. Review, and if necessary, edit the **Request Date.**
21. Review, and if necessary, edit **Currency.**
22. Review, and if necessary, edit **Requisition Type.**
23. Type in **Control Value** and **Estimated Term Dates** in the header internal memo**,** and then scroll down.
    (**Note:** *Required fields are indicated by a red asterisk.)*



Goods

24. Under the heading, **Goods,** review the information that you entered and then, if necessary, edit.
    (**Note:** *To add a new row, for additional Goods, select the plus sign icon. To remove a row, select the minus-sign icon.)*
    (**Note:** *You may need to use the horizontal scroll bar to view the entire row.)*

25. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
26. Select the menu icon and make your selection.
27. Use the horizontal scroll bar to navigate to the **Memo** field.
28. Type in **Control Value** per appropriation/program in the line **Memo** field.
29. Use the horizontal scroll bar to navigate to the **Appropriation** field.
30. To specify an **Appropriation,** type in an **Appropriation** and then select *enter* to search.
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(**Note:** *Once an* ***Appropriation*** *is selected, the* ***Fund*** *may automatically populate even if you entered a different* ***Fund*** *prior to selecting an* ***Appropriation****. Once an* ***Appropriation*** *is selected,* ***Program*** *and* ***Source of Funds*** *may also automatically populate.)*
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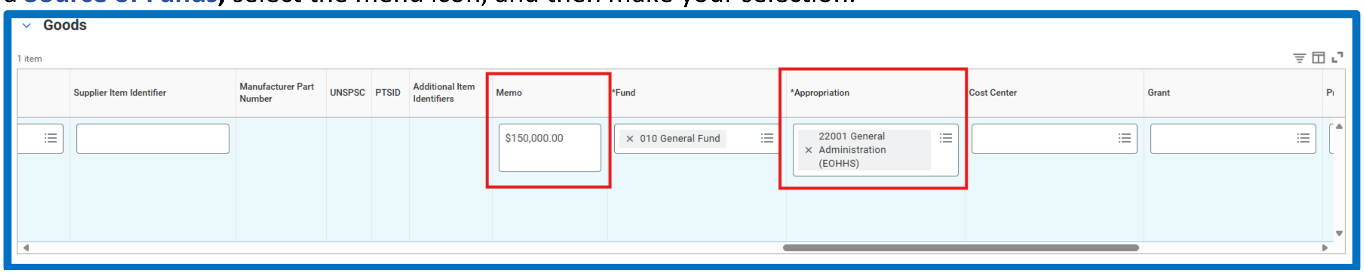
31. If applicable, to select a **Cost Center** select the menu icon, select **Active Cost Centers**, and then make your selection.
(**Note**: *Alternatively, type in the name or number of a* ***Cost Center*** *and then select* enter *to search.)*
32. If the **Source of Funds** did not automatically populate from the **Appropriation** selected above, to specify a **Source of Funds**, select the menu icon, and then make your selection.

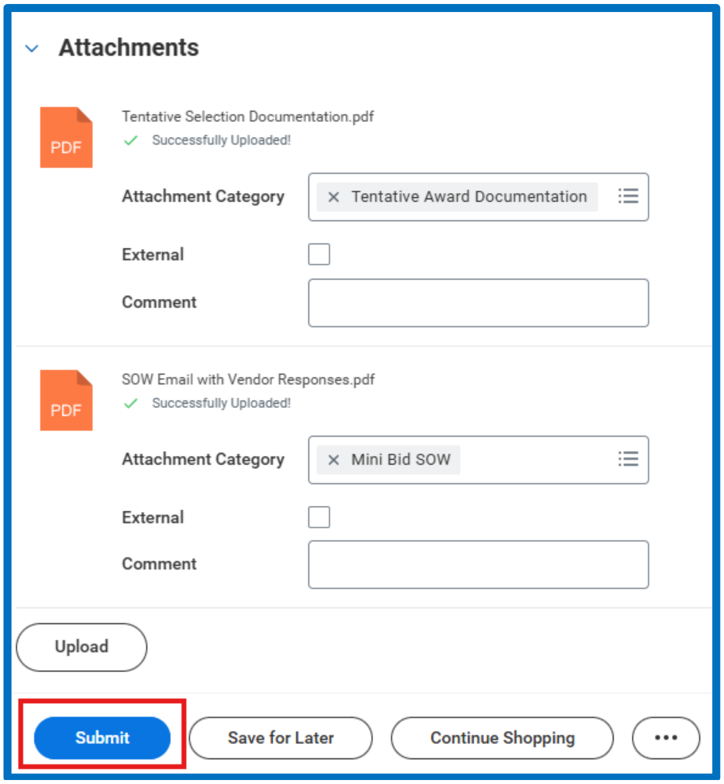


Attachments

33. To provide an **Attachment**, select the arrow preceding > **Attachments.**
   e. To upload a saved file from your device, select **Select Files,** and then follow your device instructions.
   f. To select an **Attachment Category,** select the menu icon, and then make your selection.
   g. To include the attachment on the resulting Purchase Order for the Supplier to view, type **External** in the comment field.

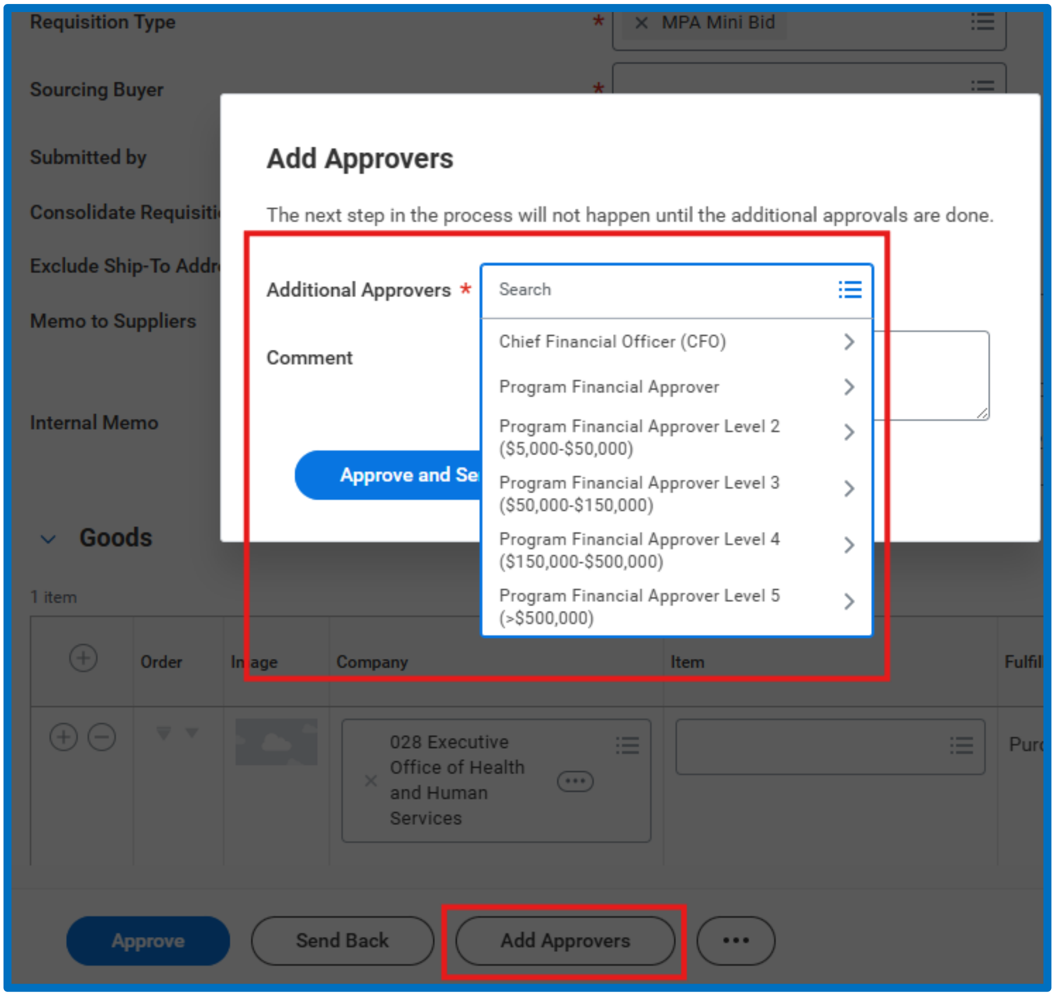
(**Note**: *To attach more documents, select* ***Upload****. To remove an attachment, select the trash can icon.)*

34. Select **Submit.**



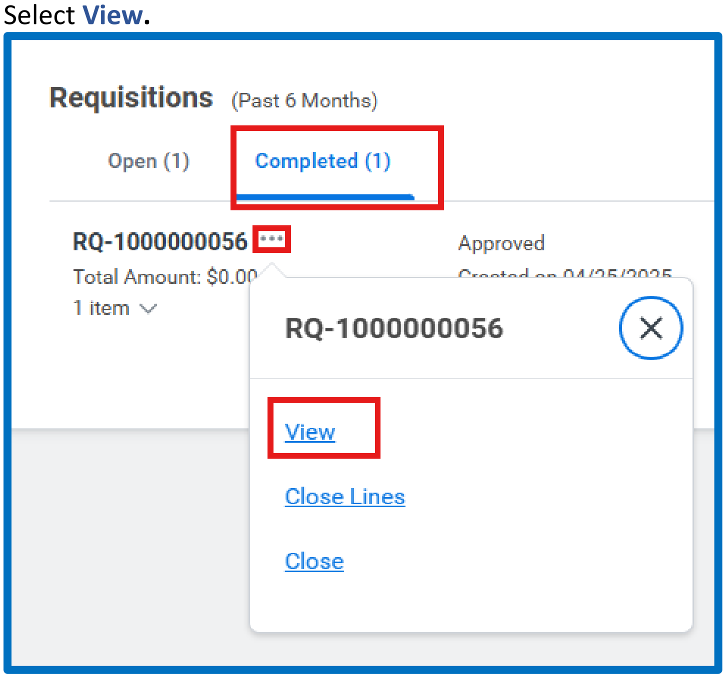
Approval Process

Once submitted, your requisition follows an approval workflow and route to the Division of Purchases for Purchase Order creation.

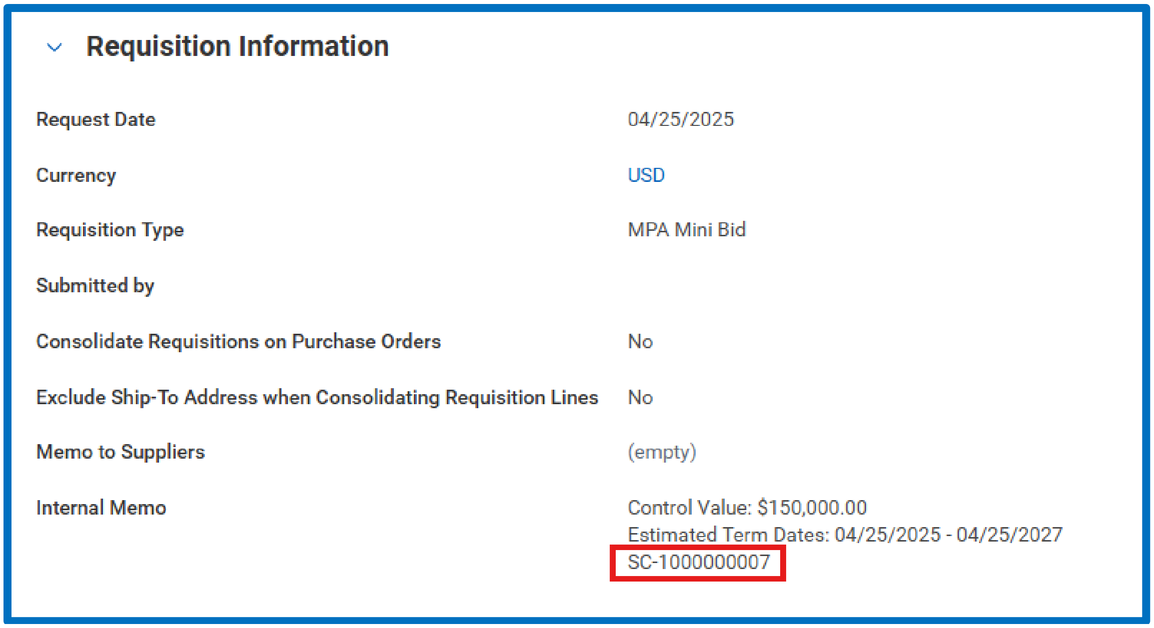


Final Steps

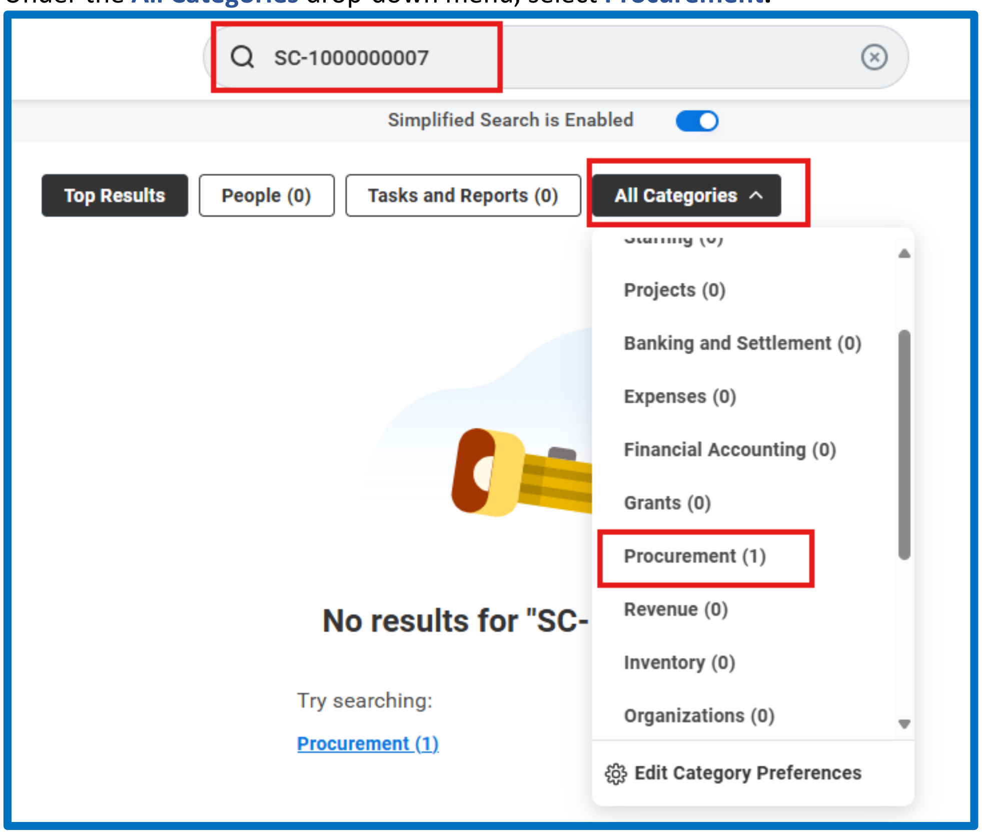
1. To view the **Supplier Contract,** return to the **Requisitions** page and select the Completed tab.
2. Select the **Action Button** next to the Requisition number**.**
3. Select **View**.



4. Copy the **Supplier Contract Number** in the **Internal Memo** field.



5. Using the Workday Search Bar, paste the **Supplier Contract Number** and select Enter.
6. Under the **All Categories** drop-down menu, select **Procurement**.

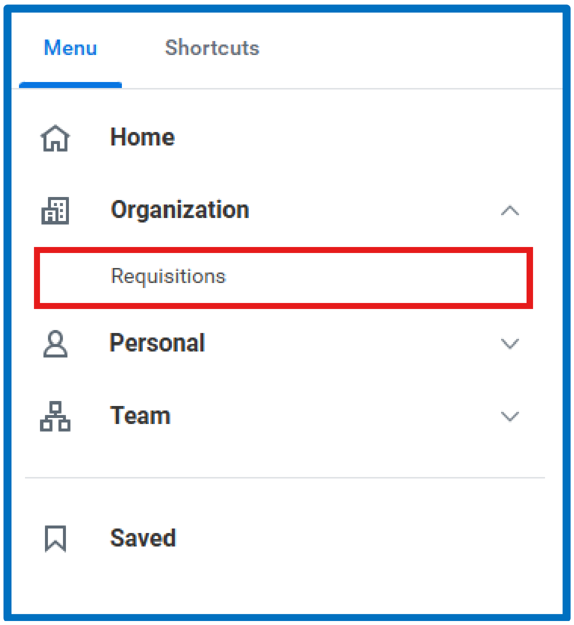


7. Select the **Supplier Contract Number** to view **Supplier Contract**.

Process for Submitting a Requisition to Contract Catalog

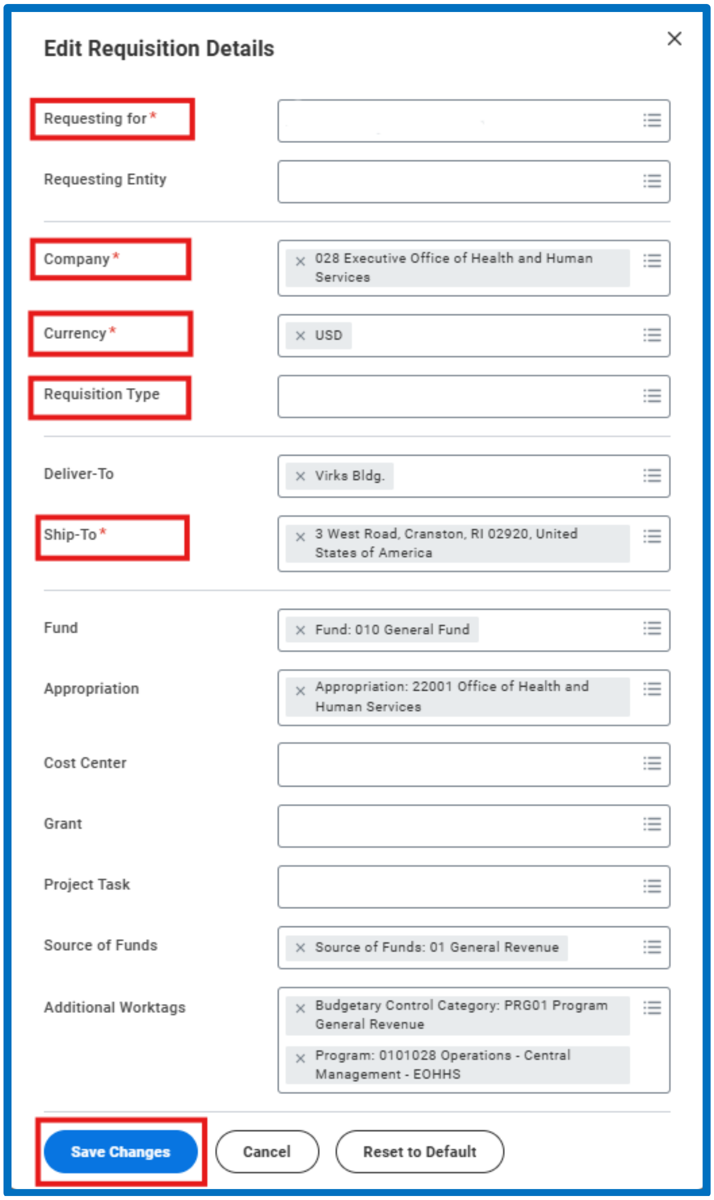
(**Note**: *Since this is a Contract Catalog, you will need to complete the Submit Catalog Load Excel Template before completing your requisition*.)

1. Using the **Submit Catalog Load** Excel Spreadsheet, fill in all required columns.
   (**Note:** *The Submit Catalog Load – Example Template includes self-help text in the description fields to guide users on how to complete each column accurately. Additionally, the spreadsheet provides reference examples to assist with the completion process.)*
2. Select **File** and **Save As.** Select **Browse** to save this file to your device. Enter **File Name** with what you wish the Contract Catalog title to be.
3. Select **Save.**
4. In the ERP system, select the Navigation Menu at the top left corner of the toolbar.
5. Under Organization, select Requisitions
   (**Note:** *If the 'Requisitions' app is not listed in your* ***Menu****, select* ***(+) Add*** *> type 'Requisitions' in the* ***Find Apps*** *field > select the plus-sign > select* ***Back to Menu.****)*



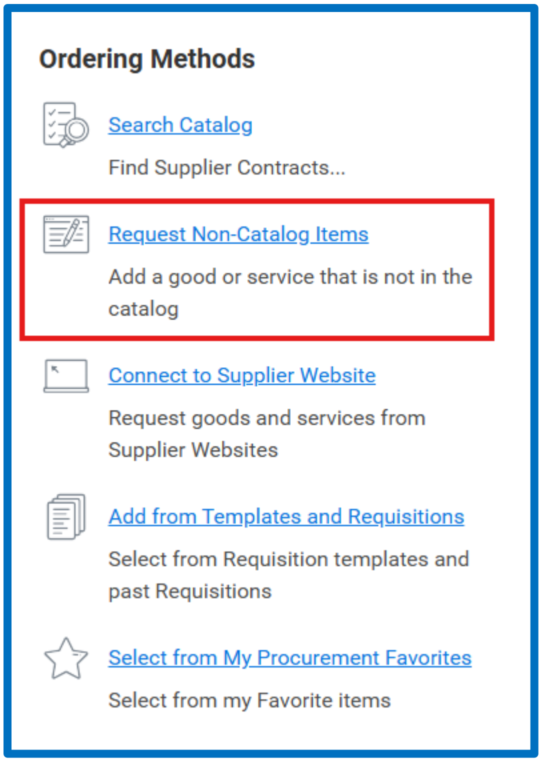
Requisition Details

6. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details,** select **Edit Details.**
7. The **Requesting for** name defaults to your name. To select a different **Requesting for** name, type in a name, select enter to search, and then make your selection.
8. **Company** name defaults to your **Company.**
9. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies,** and then making your selection.
10. To select a **Requisition Type,** select the menu icon, and then select your requisition type.
    (**Note:** *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.)*
11. Select **Save Changes.**
    (**Note:** *Required fields are indicated by a red asterisk.)*



Ordering Methods

12. Under the heading, **Ordering Methods**, select **Request Non-Catalog Items.**



Request Type

13. Specify whether this request type is a **Goods** item or a **Service**.

Request Details

14. Under the heading **Request Details**, to select a **Supplier**, select the menu icon, select **Suppliers by Supplier Group**, select a group, and then make your selection.
    (**Note**: *Alternatively, type in a **Supplier**, select* enter *to search, and then make your selection from the search results.)*
15. To select a **Commodity Code**, select the menu icon, select **Commodity Code by Type**, select UNSPSC, and then make your selection.
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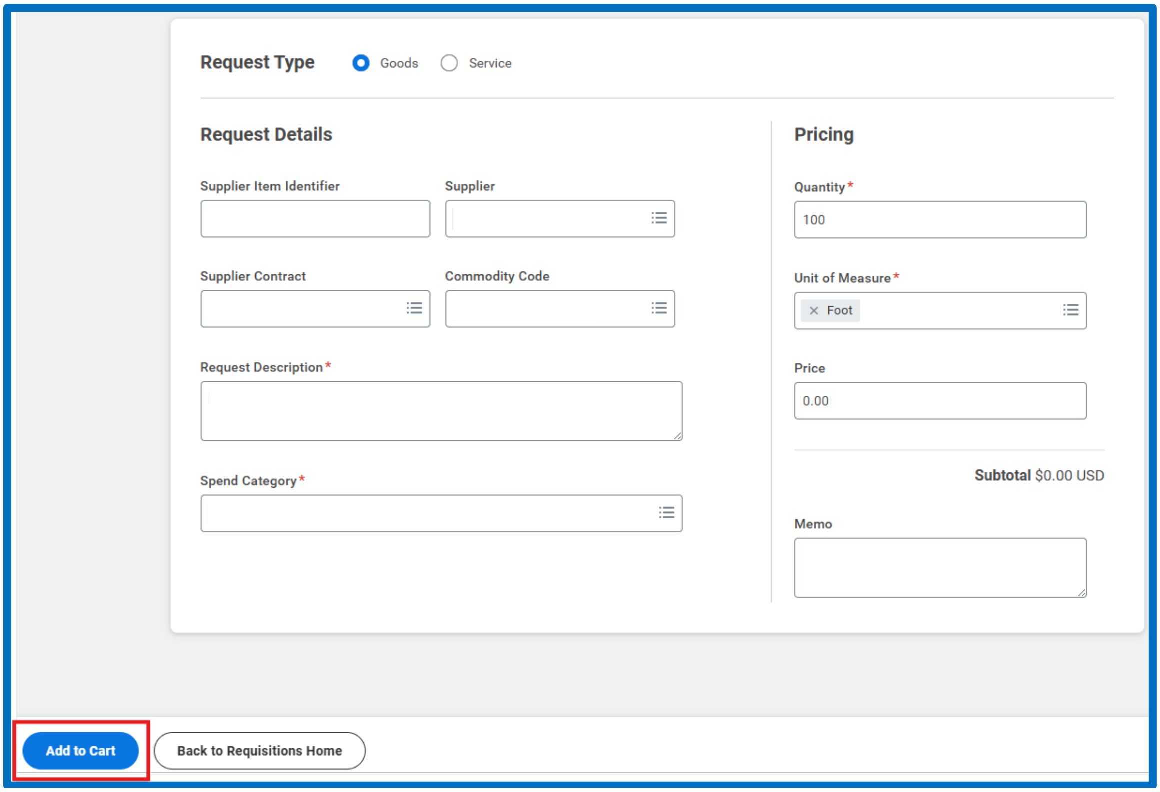
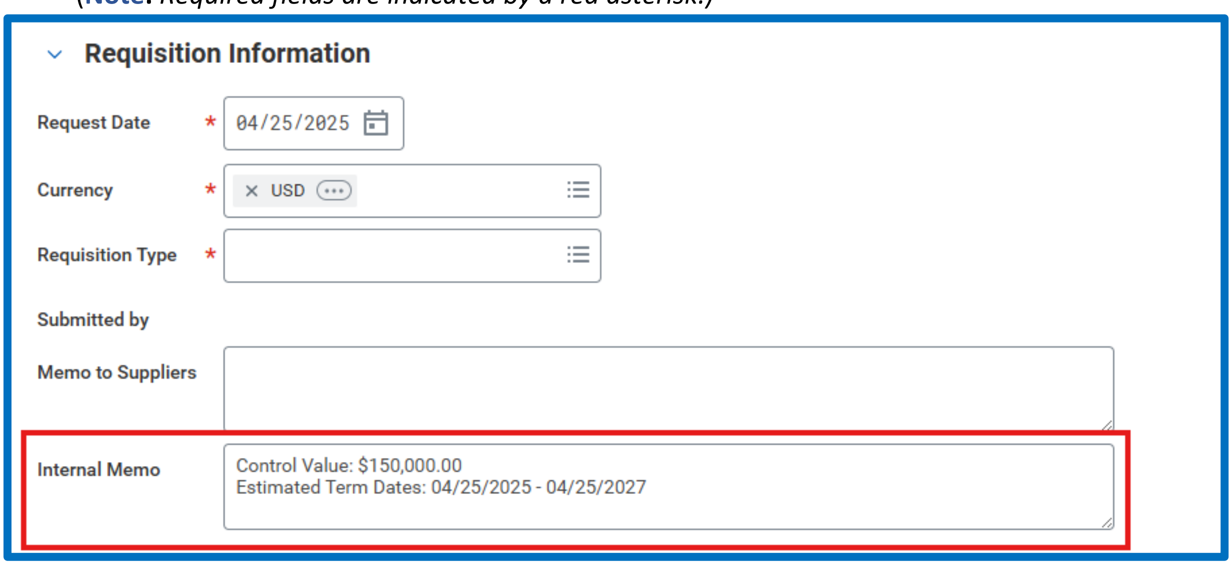
22. Review the contents of the cart, and once ready, select **Checkout**.
    (Note: *An error message may generate to remind you that an attachment is required.)*



Requisition Information

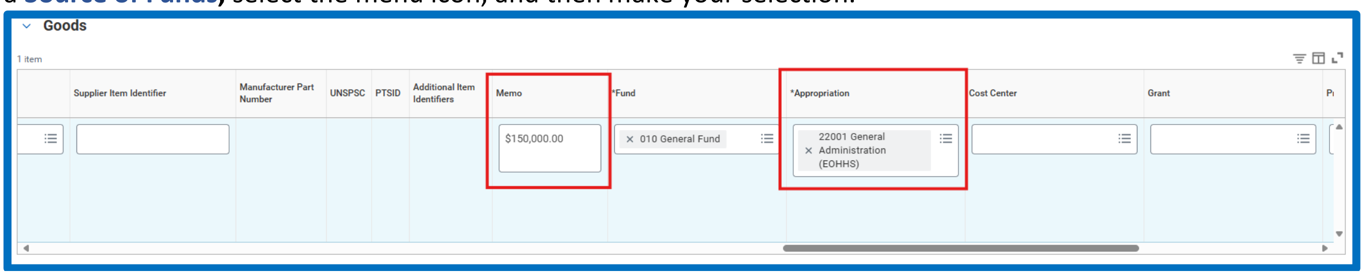
23. Review, and if necessary, edit the **Request Date**.
24. Review, and if necessary, edit **Currency**.
25. Review, and if necessary, edit **Requisition Type**.
26. Type in **Control Value** and **Estimated Term Dates** in the header internal memo**,** and then scroll down. (**Note**: *Required fields are indicated by a red asterisk.)*



Goods

27. Under the heading, **Goods,** review the information that you entered and then, if necessary, edit. (**Note**: *To add a new row, for additional Goods, select the plus sign icon. To remove a row, select the minus-sign icon.)*
(**Note**: *You may need to use the horizontal scroll bar to view the entire row.)*
28. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
29. Select the menu icon and make your selection.

30. Use the horizontal scroll bar to navigate to the **Memo** field.
31. Type in **Control Value** per appropriation/program in the line **Memo** field.
32. Use the horizontal scroll bar to navigate to the **Appropriation** field.
33. To specify an **Appropriation**, type in an **Appropriation** and then select *enter* to search.
(**Note**: *Alternatively, select the menu icon, select **Active Appropriations by Appropriation Hierarchy**, select an Appropriations Hierarchy, and then continue selecting options to ultimately make your selection. (For example, select Active Appropriations by Appropriation Hierarchy > SORI Appropriation > Education > 026 Rhode Island Council on the Arts > 31002 Film Commission.)*
(**Note**: *Once an **Appropriation** is selected, the **Fund** may automatically populate even if you entered a different **Fund** prior to selecting an **Appropriation**. Once an **Appropriation** is selected, **Program** and **Source of Funds** may also automatically populate.)*
(**Note**: *Alternatively, to select an **Appropriation**, select the menu icon, then, if available, select **My Worktags**, and then make your selection.)*
34. If applicable, to select a **Cost Center** select the menu icon, select **Active Cost Centers**, and then make your selection.
(**Note**: *Alternatively, type in the name or number of a **Cost Center** and then select* enter *to search.)*
35. If the **Source of Funds** did not automatically populate from the **Appropriation** selected above, to specify a **Source of Funds**, select the menu icon, and then make your selection.



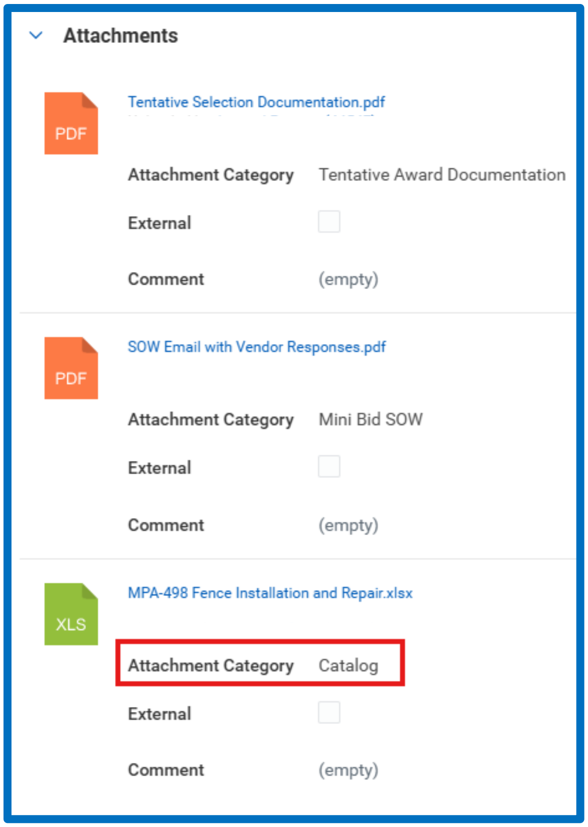
Attachments

(Note: *You **must** upload your completed Submit Catalog Load Excel Template with the **Attachment Category** of **Catalog** for this to become a Contract Catalog.)*

36. To provide an **Attachment**, select the arrow preceding > **Attachments**.

h. To upload a saved file from your device, select **Select Files**, and then follow your device instructions.
i. To select an **Attachment Category**, select the menu icon, and then make your selection.
j. To include the attachment on the resulting Purchase Order for the Supplier to view, type **External** in the comment field.

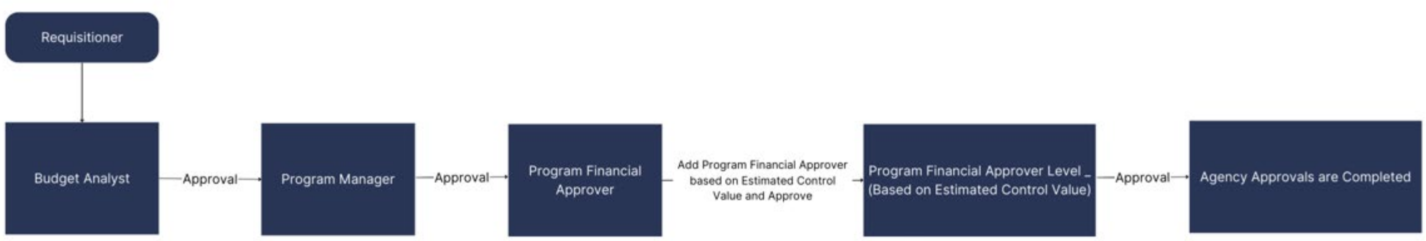
(**Note**: *To attach more documents, select **Upload**. To remove an attachment, select the trash can icon.)*

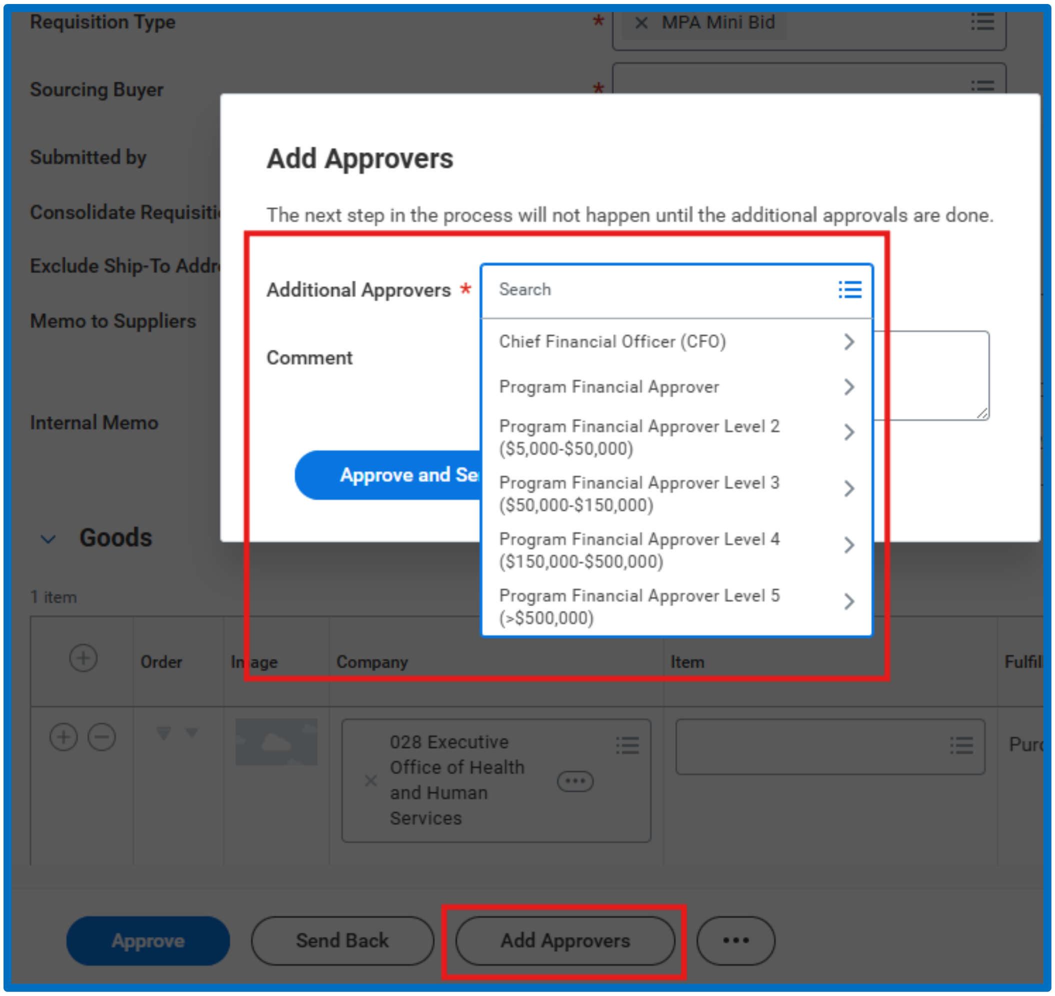


37. Select **Submit.**

Approval Process

Once submitted, your requisition follows an approval workflow and route to the Division of Purchases for Purchase Order creation.

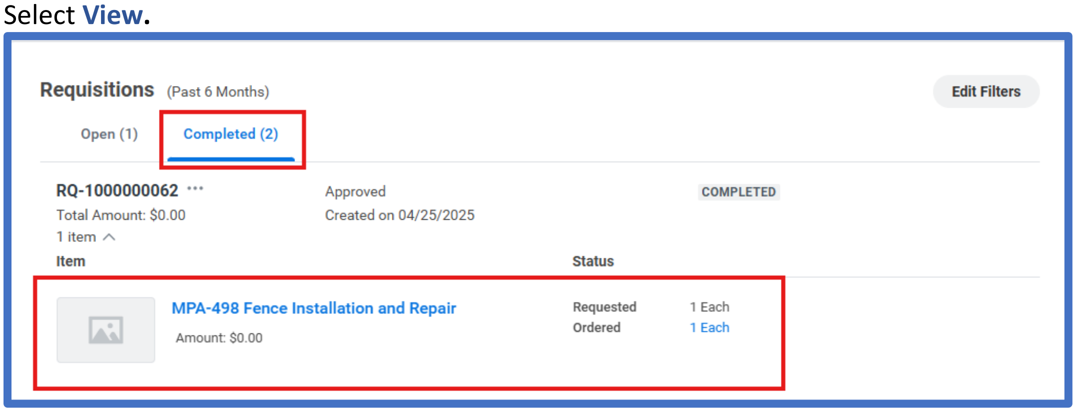




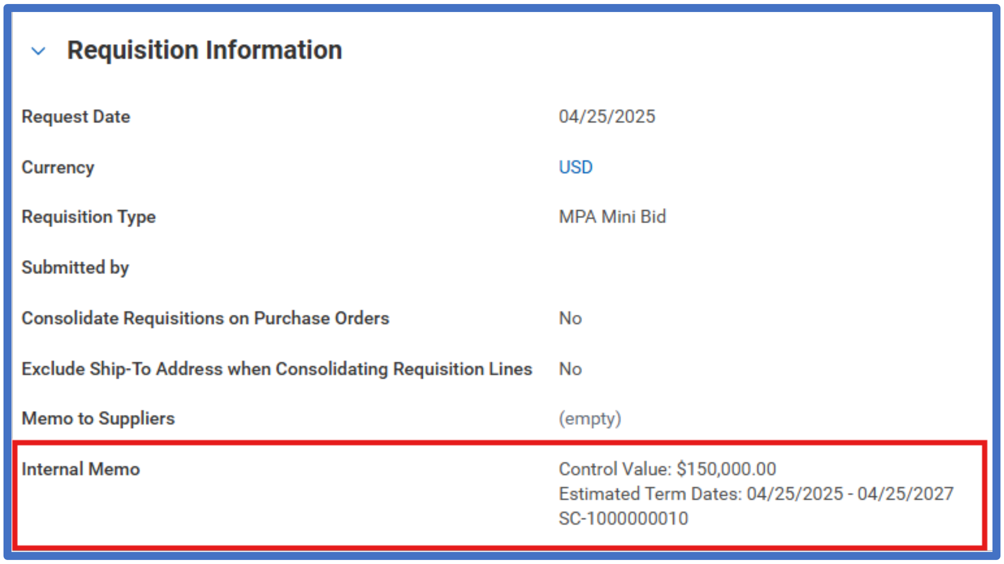
Requisitioner:

Final Steps

8. To view the **Supplier Contract**, return to the **Requisitions** page and select the Completed tab.
9. Select the **Action Button** next to the Requisition number.
10. Select **View**.



11. Copy the **Supplier Contract Number** in the **Internal Memo** field.



12. Using the Workday Search Bar, paste the **Supplier Contract Number** and select Enter.
13. Under the **All Categories** drop-down menu, select **Procurement.**
14. Select the **Supplier Contract Number** to view **Supplier Contract.**