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





- 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 minibid, 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

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#### 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.)

Menu	Shortcuts
ណ៍	Home
圕	Organization ^
	Requisitions
8	Personal ~
8	Team ~
	Saved

#### **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.
- 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.)

Edit Requisition Details	5	×
Requesting for*		∷≡
Requesting Entity		∷≡
Company*	× 028 Executive Office of Health and Human Services	∷≡
Currency*	× USD	∷≡
Requisition Type		∷≡
Deliver-To	× Virks Bldg.	∷≡
Ship-To*	× 3 West Road, Cranston, RI 02920, United States of America	:=
Fund	× Fund: 010 General Fund	:=
Appropriation	× Appropriation: 22001 Office of Health and Human Services	:=
Cost Center		∷≡
Grant		∷≡
Project Task		≔
Source of Funds	× Source of Funds: 01 General Revenue	≔
Additional Worktags	X Budgetary Control Category: PRG01 Program General Revenue     Y Program: 0101028 Operations - Central Management - EOHHS	:=
Save Changes Can	cel Reset to Default	

## **Ordering Methods**

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

Order	ing Methods
, T	<u>Search Catalog</u> Find Supplier Contracts
	Request Non-Catalog Items Add a good or service that is not in the catalog
ĸ	<u>Connect to Supplier Website</u> Request goods and services from Supplier Websites
	Add from Templates and Requisitions Select from Requisition templates and past Requisitions
$\overleftrightarrow$	<u>Select from My Procurement Favorites</u> Select from my Favorite items

#### **Request Type**

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

**Request Details** 

- 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.

Request Details		Pricing
Supplier Item Identifier	Supplier	Quantity*
Supplier Contract	Commodity Code	Unit of Measure *
Request Description*		Price
Spend Category*		Subtotal \$
		Hemo

- 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.)

# ed.) 🤄

#### **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.

✓ Atta	chments	
PDF	✓ Successfully Uploaded!	
	Attachment Category	
	External	
	Comment	
PDF	✓ Successfully Uploaded!	
	Attachment Category	:=
	External	
	Comment	
Upload		
Sub	mit Save for	Later Continue Shopping

#### **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)

Or Description lowering	Worktag Fund: 0
Ordering	$\times$
<ul> <li>PO-100000042</li> <li>Status: Approved</li> <li>Contact:</li> <li>Supplier:</li> </ul>	

Γ	Goods Lines	Process History	Attachments	Printing Runs		
Pi	rinting Runs 1 item					
	Printed Date				Issue Option	PDF File
	04/25/2025 11:05:10	AM			Print	P0-1000000042 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.)

Menu	Shortcuts	
ណ	Home	
圕	Organization ^	
	Requisitions	
8	Personal v	
名 品	Personal $\checkmark$ Team $\checkmark$	

#### **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.
- 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.)

Edit Requisition Details	S	×
Requesting for*		:=
Requesting Entity		∷≡
Company*	× 028 Executive Office of Health and Human Services	:=
Currency*	× USD	≔
Requisition Type		∷≡
Deliver-To	× Virks Bldg.	:=
Ship-To*	× 3 West Road, Cranston, RI 02920, United States of America	:=
Fund	× Fund: 010 General Fund	∷≡
Appropriation	× Appropriation: 22001 Office of Health and Human Services	∷≡
Cost Center		≔
Grant		∷≡
Project Task		≔
Source of Funds	× Source of Funds: 01 General Revenue	≔
Additional Worktags	X Budgetary Control Category: PRG01 Program General Revenue     Y Program: 0101028 Operations - Central Management - EOHHS	:=
Save Changes Car	ncel Reset to Default	

## **Ordering Methods**

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

Order	ing Methods
, T	<u>Search Catalog</u> Find Supplier Contracts
	Request Non-Catalog Items Add a good or service that is not in the catalog
ĸ	<u>Connect to Supplier Website</u> Request goods and services from Supplier Websites
	Add from Templates and Requisitions Select from Requisition templates and past Requisitions
$\overleftrightarrow$	<u>Select from My Procurement Favorites</u> Select from my Favorite items

#### **Request Type**

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

**Request Details** 

- 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.

Request Details		Pricing
Supplier Item Identifier	Supplier ]:≡	Quantity* 100
Supplier Contract	Commodity Code	Unit of Measure *
Request Description *		Price 0.00
Spend Category*		Subtotal \$0.00 USD
	:=	Memo

(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.)

<ul> <li>Requisition</li> </ul>	<ul> <li>Requisition Information</li> </ul>								
Request Date *	04/25/2025								
Currency *									
Requisition Type *	:=								
Submitted by									
Memo to Suppliers									
Internal Memo	Control Value: \$150,000.00 Estimated Term Dates: 04/25/2025 - 04/25/2027								

#### 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.
   (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.)

**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.

✓ Goo	Goods										
1 item	.tem 👳 🖬 🗸								□."		
	Supplier Item Identifier	Manufacturer Part Number	UNSPSC	PTSID	Additional Item Identifiers	Memo	*Fund	*Appropriation	Cost Center	Grant	Pi
:=						\$150,000.00	× 010 General Fund	22001 General × Administration (EOHHS)	=		) (* •
•								-			Þ

#### 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.

<ul> <li>Atta</li> <li>PDF</li> </ul>	Tentative Selection Documentation.pdf Successfully Uploaded!
	Attachment Category X Tentative Award Documentation
	External
	Comment
PDF	SOW Email with Vendor Responses.pdf Successfully Uploaded!
	Attachment Category X Mini Bid SOW
	External
	Comment
Upload	d
Sub	Save for Later Continue Shopping

#### **Approval Process**

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



Requisition Type		* 🗙 MPA Mini Bid	=
Sourcing Buyer		*	
Submitted by	Add Approvers		
Consolidate Requisiti	The next step in the proc	cess will not happen until the additiona	al approvals are done.
Exclude Ship-To Addro	Additional Approvers *	Search	
Memo to Suppliers		Chief Einancial Officer (CEO)	
	Comment	Program Einancial Approver	
Internal Memo		Program Financial Approver Level 2 (\$5.000.\$50.000)	>
	Approve and Se	(\$5,000 550,000) Program Financial Approver Level 3 (\$50,000-\$150,000)	>
✓ Goods		Program Financial Approver Level 4 (\$150,000-\$500,000)	>
1 item		Program Financial Approver Level 5 (>\$500,000)	>
+ Order Ir	age Company	ltem	Fulfil
	028 Execu Office of H and Huma Services	tive ∷≣ iealth	Puro
Арргоче	Send Back	Add Approvers	

#### **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.

<ul> <li>Requisition Information</li> </ul>	
Request Date	04/25/2025
Currency	USD
Requisition Type	MPA Mini Bid
Submitted by	
Consolidate Requisitions on Purchase Orders	No
Exclude Ship-To Address when Consolidating Requisition Lines	No
Memo to Suppliers	(empty)
Internal Memo	Control Value: \$150,000.00 Estimated Term Dates: 04/25/2025 - 04/25/2027 SC-1000000007

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

Q SC-100000007	$\otimes$
Simplified Search is En	abled 💽
Top Results People (0) Tasks and Reports (0)	All Categories A Projects (0) Banking and Settlement (0) Expenses (0) Financial Accounting (0) Grants (0)
<b>No results for "SC-</b> Try searching: <u>Procurement (1)</u>	Procurement (1) Revenue (0) Inventory (0) Organizations (0)

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.)
  - 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.)

Men	u Shortcuts
ធ	Home
圕	Organization ^
	Requisitions
8	Personal ~
品	Team ~
	Saved

#### **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.)

Edit Requisition Detail	s	×
Requesting for *		∷≡
Requesting Entity		∷≡
Company*	× 028 Executive Office of Health and Human Services	:=
Currency *	× USD	≔
Requisition Type		∷⊒
Deliver-To	× Virks Bldg.	:=
Ship-To*	× 3 West Road, Cranston, RI 02920, United States of America	∷
Fund	× Fund: 010 General Fund	:=
Appropriation	× Appropriation: 22001 Office of Health and Human Services	=
Cost Center		∷≡
Grant		≔
Project Task		∷≡
Source of Funds	× Source of Funds: 01 General Revenue	$\equiv$
Additional Worktags	X Budgetary Control Category: PRG01 Program General Revenue     Program: 0101028 Operations - Central Management - EOHHS	∷≡
Save Changes Car	ncel Reset to Default	

## **Ordering Methods**

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

Order	Ordering Methods								
, T	<u>Search Catalog</u> Find Supplier Contracts								
	Request Non-Catalog Items Add a good or service that is not in the catalog								
ĸ	<u>Connect to Supplier Website</u> Request goods and services from Supplier Websites								
	Add from Templates and Requisitions Select from Requisition templates and past Requisitions								
$\overleftrightarrow$	<u>Select from My Procurement Favorites</u> Select from my Favorite 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.

(Note: By selecting a Commodity Code the field Spend Category will auto populate.)

- 16. To specify what you need, type in a Description.
- 17. Type in a Quantity.
- 18. Type in a Unit of Measure.
- **19.** Type in a **Price** as \$0.00.

(Note: Please enter numbers only, no dollar signs.)

- **20.** Optionally, type a comment in the Memo field.
- 21. Select Add to Cart.
- **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.)

Request Details	Pricing
Supplier Item Identifier Supplier	Quantity* 100
Supplier Contract Commodity Code	Unit of Measure*
Request Description*	Price 0.00
Spend Category* 	Subtotal \$0.00 USD

#### **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.*)

<ul> <li>Requisition Information</li> </ul>								
Request Date	04/25/2025 💼							
Currency	× USD	:=						
Requisition Type		:=						
Submitted by								
Memo to Suppliers								
Internal Memo	Control Value: \$150,000.00 Estimated Term Dates: 04/2	5/2025 - 04/25/2027						

#### 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.

✓ Go	ods										
1 item	tem 🚽 🚽 🐺								⊡ ."		
	Supplier Item Identifier	Manufacturer Part Number	UNSPSC	PTSID	Additional Item Identifiers	Memo	*Fund	*Appropriation	Cost Center	Grant	Pi
						\$150,000.00	X 010 General Fund	22001 General := × Administration (EOHHS)	:=		:) (*
4											Þ

#### 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.)

<ul> <li>Attac</li> </ul>	<ul> <li>✓ Attachments</li> </ul>			
PDF	Tentative Selection Documentation.pdf			
	Attachment Category	Tentative Award Documentation		
	External			
	Comment	(empty)		
PDF	SOW Email with Vendor Responses.pdf			
	Attachment Category	Mini Bid SOW		
	External			
	Comment	(empty)		
XLS	MPA-498 Fence Installation and Repair.xlsx			
	Attachment Category	Catalog		
	External			
	Comment	(empty)		

#### 37. Select Submit.

#### **Approval Process**

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



Requisition Type		* X MPA Mini Bid	=
Sourcing Buyer		*	:=
Submitted by	Add Approvers		
Consolidate Requisition	The next step in the proc	cess will not happen until the additiona	al approvals are done.
Exclude Ship-To Addre	Additional Approvers *	Search	
Memo to Suppliers		Chief Financial Officer (CFO)	<u> </u>
	Comment	Program Financial Approver	>
Internal Memo	Approve and Se	Program Financial Approver Level 2 (\$5,000-\$50,000)	>
		Program Financial Approver Level 3 (\$50,000-\$150,000)	>
✓ Goods		Program Financial Approver Level 4 (\$150,000-\$500,000)	>
1 item		Program Financial Approver Level 5 (>\$500,000)	>
+ Order I	n age Company	Item	Fulfil
Image: Constraint of the second se			
Арргоче	Send Back	Add Approvers	

#### **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.

Requisitions (Past 6 Months)				Edit Filters
Open (1) Completed (2)				
RQ-100000062 ···	Approved		COMPLETED	
Total Amount: \$0.00	Created on 04/25/2025			
Item		Status		
Amount: \$0.00	Installation and Repair	Requested Ordered	1 Each 1 Each	

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

<ul> <li>Requisition Information</li> </ul>				
Request Date	04/25/2025			
Currency	USD			
Requisition Type	MPA Mini Bid			
Submitted by				
Consolidate Requisitions on Purchase Orders	No			
Exclude Ship-To Address when Consolidating Requisition Lines	No			
Memo to Suppliers	(empty)			
Internal Memo	Control Value: \$150,000.00 Estimated Term Dates: 04/25/2025 - 04/25/2027 SC-1000000010			

- **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.

Top Results People (0) Tasks and Reports (0)	Procurement (1) ∨			
Procurement				
SC-100000010 : MPA-498 Fence Installation and Repair MiniBid Supplier Contract				