ERP Job Aid
RI Enterprise Resource Planning

Amendments

Amendment Reasons:

- 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

Notes:

- Do **not** select Change from the related actions menu. Instead, you must select **Amend Supplier Contract** and then you may select **Change** as your Amendment Reason. Selecting Change from the related actions menu will result in the contract becoming stuck in an "Approval in Process" status, which can only be resolved by canceling and recreating the contract.
- Requisitioners do not have the ability to modify Master Purchase Agreements directly. If an amendment is needed, it must be requested through the Buyer of record.
- It is possible to process more than one amendment type at the same time. When doing so, use the Amendment Description field to clearly outline all relevant reasons and justifications.
- Under the "Spend Transactions" section, the PO Balance Remaining reflects the outstanding balance remaining on the contract.

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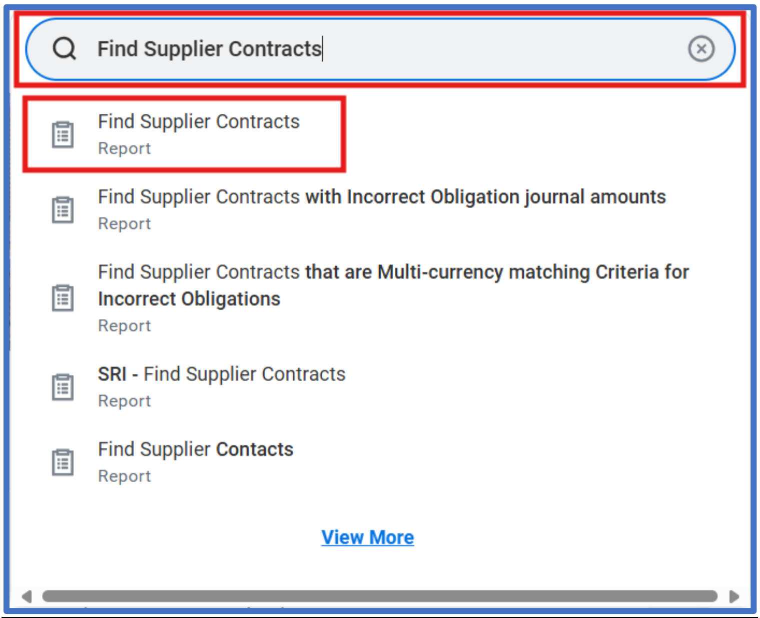
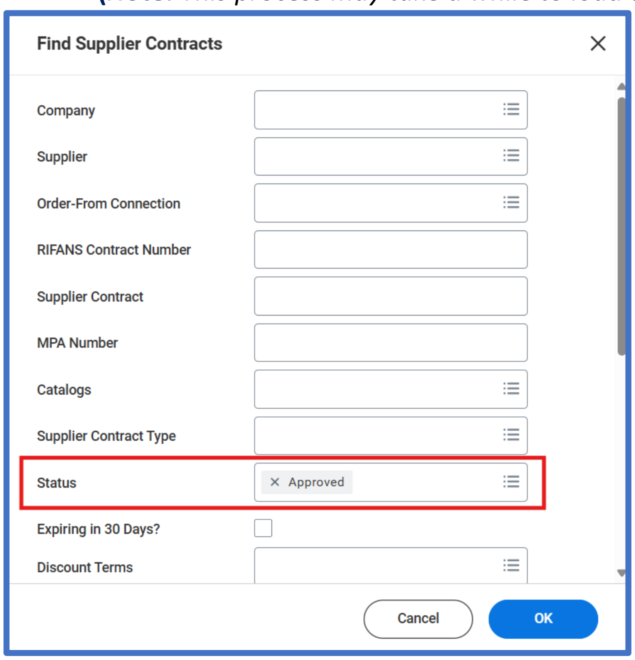
Termination:

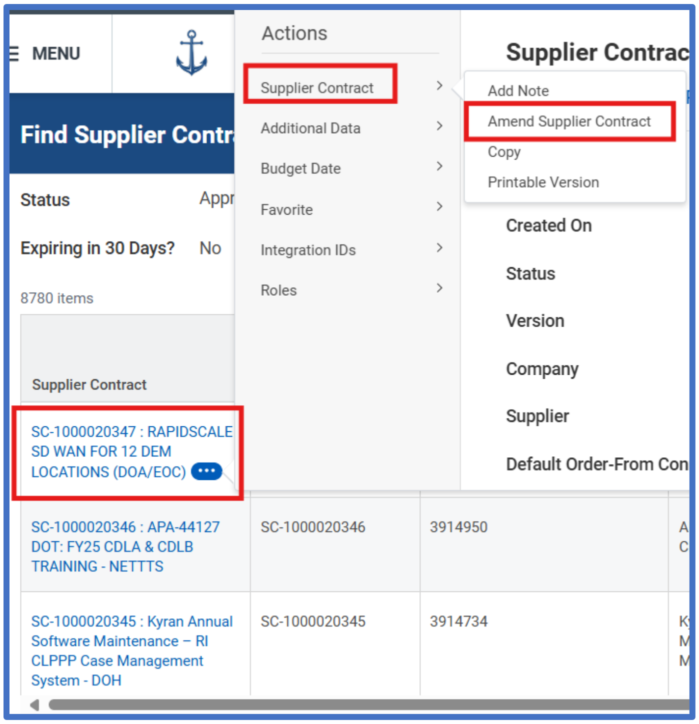
1. Using the Workday Search Bar, type **Find Supplier Contracts** and select the report.



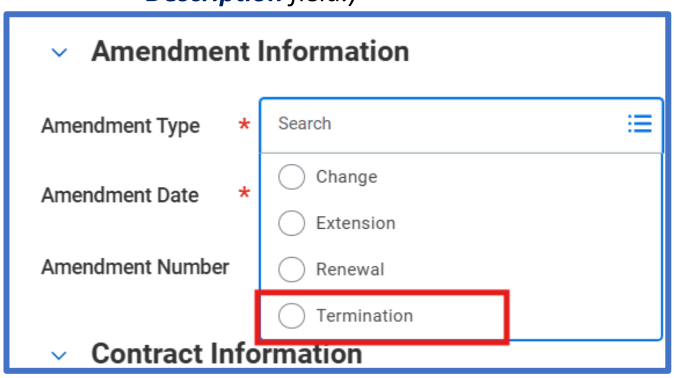
2. Filter the **Status** field to **Approved** and select **OK.**
   (***Note:*** *This process may take a while to load as indicated by the loading symbol.)*



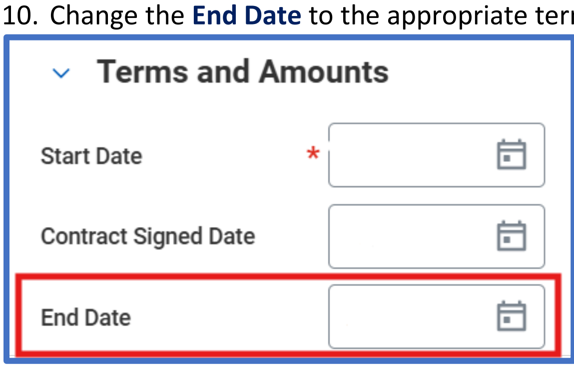
3. Locate the **Supplier Contract** you are initiating an Amendment to and select the related actions button next to the Supplier Contract title.
4. Hover over **Supplier Contract** and select **Amend Supplier Contract**.



5. 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.)*

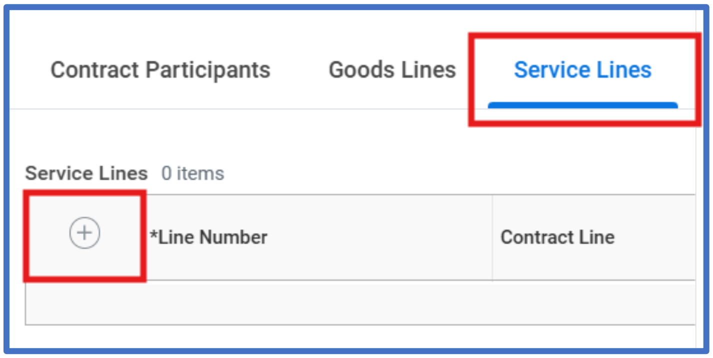


6. The **Amendment Date** defaults to todays date.
7. If applicable, enter the **Amendment Number** in the **Amendment Number** field.
8. Enter additional information to support the amendment type in the **Amendment Description** field.
9. Scroll to the **Terms and Amounts** heading.
10. Change the **End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



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).*



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.

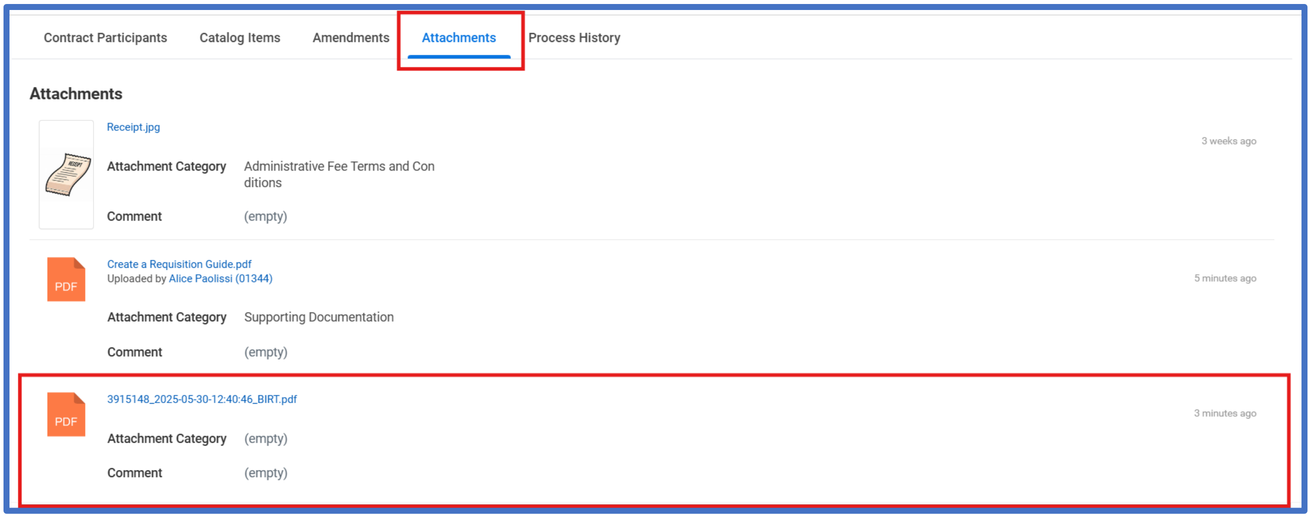
    (**Note:** *To attach more documents, select **Upload**. To remove an attachment, select the trash can icon.*
16. Select **Submit** to finalize the Amendment.

Approval Process

Once submitted, the change order follows an approval workflow.

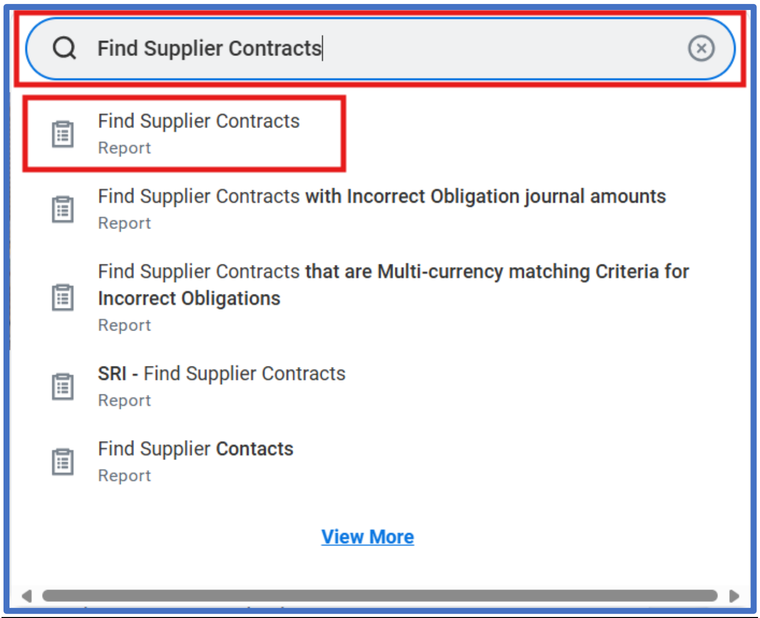
Agency Requisitioner Confirmation:

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

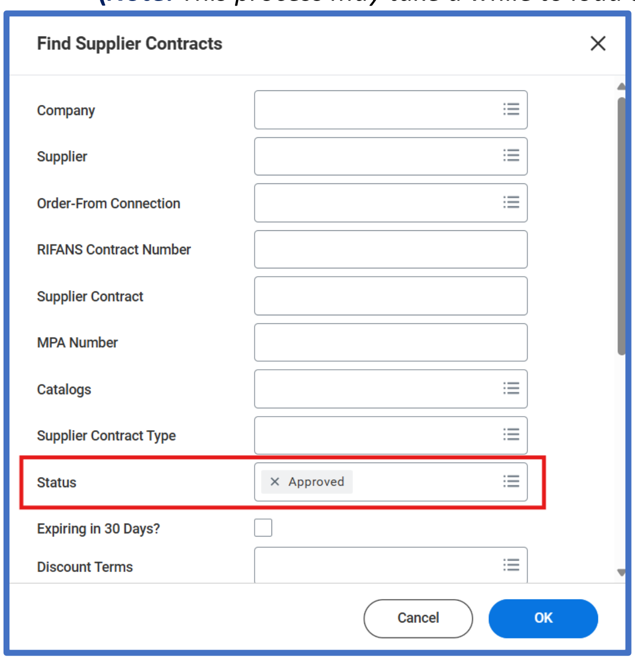

Contract Participants
Catalog Items
Amendments
Attachments
Process History
Attachments
Receipt.jpg
3 weeks ago
Attachment Category
Administrative Fee Terms and Conditions
Comment
(empty)
Create a Requisition Guide.pdf
Uploaded by Alice Paolissi (01344)
5 minutes ago
Attachment Category
Supporting Documentation
Comment
(empty)
3915148_2025-05-30-12:40:46_BIRT.pdf
3 minutes ago
Attachment Category
(empty)
Comment
(empty)

Extension or Renewal:

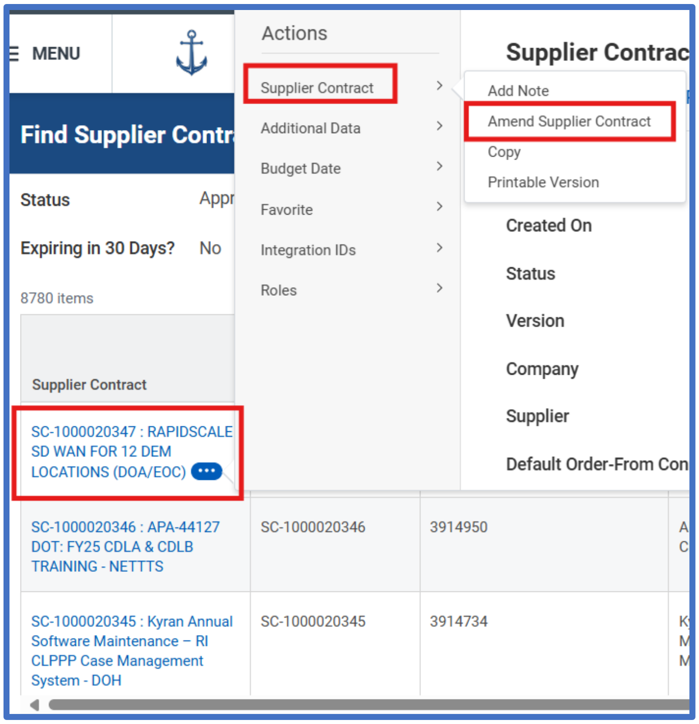
1. Using the Workday Search Bar, type **Find Supplier Contracts** and select the report.



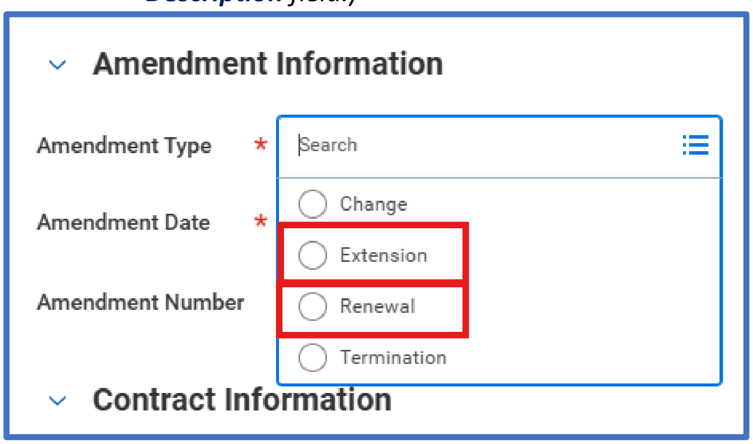
2. Filter the **Status** field to **Approved** and select **OK.**
   (***Note:*** *This process may take a while to load as indicated by the loading symbol.)*



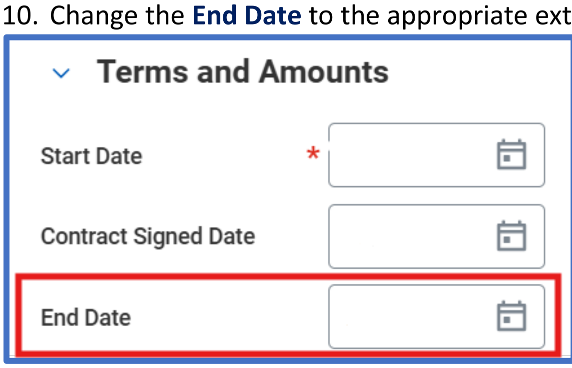
3. Locate the **Supplier Contract** you are initiating an Amendment to and select the related actions button next to the Supplier Contract title.
4. Hover over **Supplier Contract** and select **Amend Supplier Contract**.



5. 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.)*

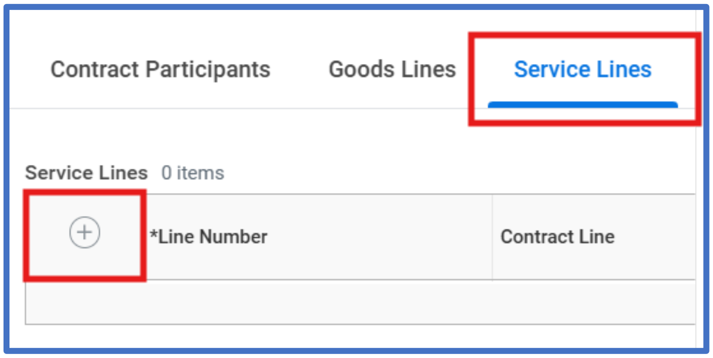


6. The **Amendment Date** defaults to todays date.
7. If applicable, enter the **Amendment Number** in the **Amendment Number** field.
8. Enter additional information to support the amendment type in the **Amendment Description** field.
9. Scroll to the **Terms and Amounts** heading.
10. Change the **End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



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).*



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.

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- The Supplier Contract will now reflect **Approved** status with a **Version Number.**
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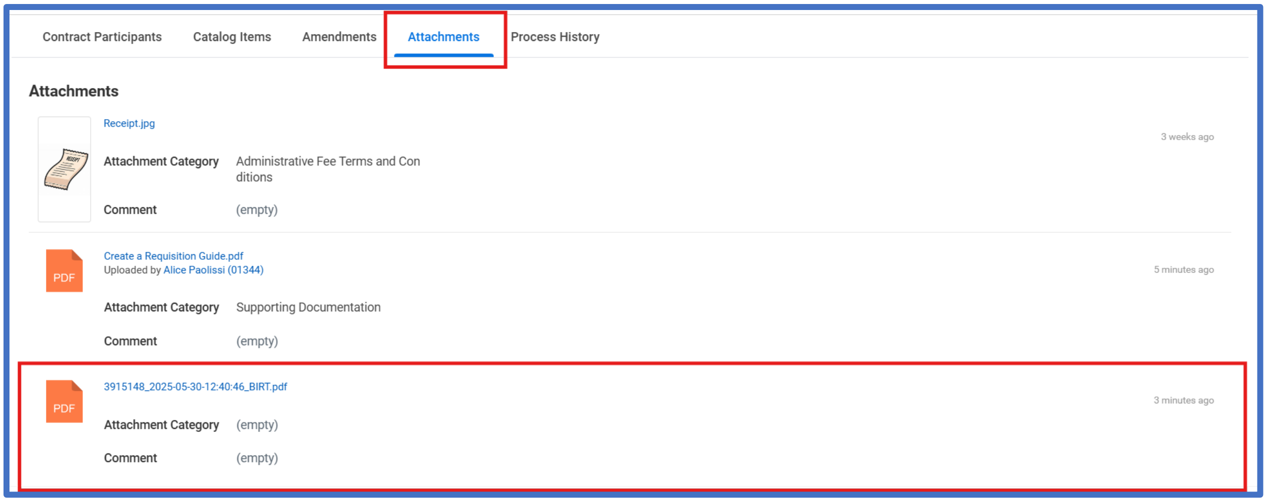
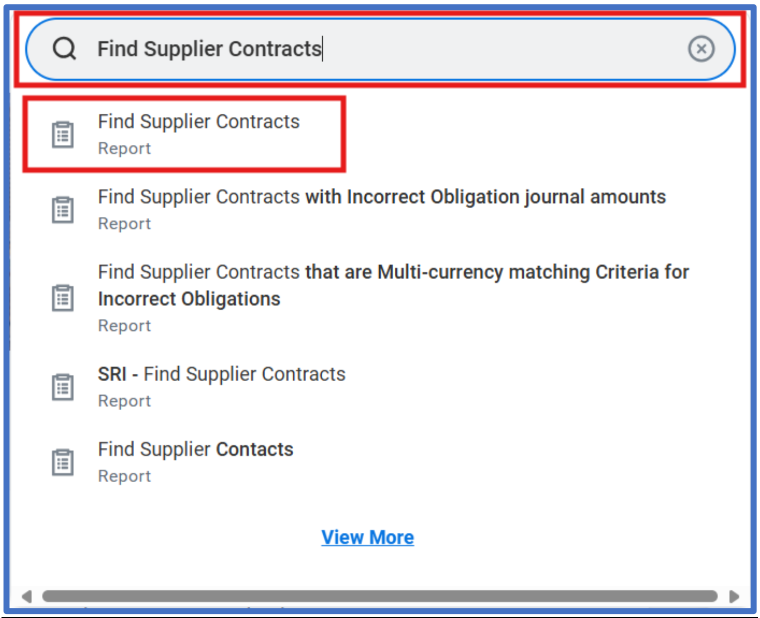

Contract Participants
Catalog Items
Amendments
Attachments
Process History
Attachments
Receipt.jpg
3 weeks ago
Attachment Category
Administrative Fee Terms and Conditions
Comment
(empty)
Create a Requisition Guide.pdf
Uploaded by Alice Paolissi (01344)
5 minutes ago
Attachment Category
Supporting Documentation
Comment
(empty)
3915148_2025-05-30-12:40:46_BIRT.pdf
3 minutes ago
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.



2. Filter the **Status** field to **Approved** and select **OK.**
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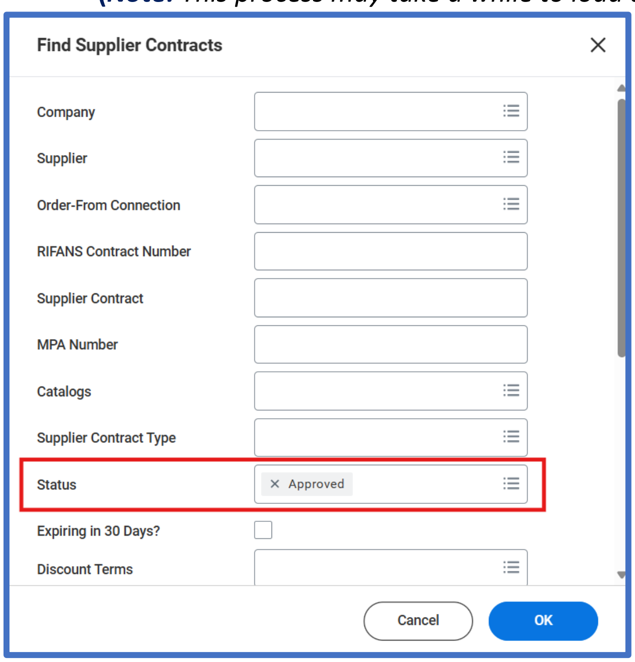

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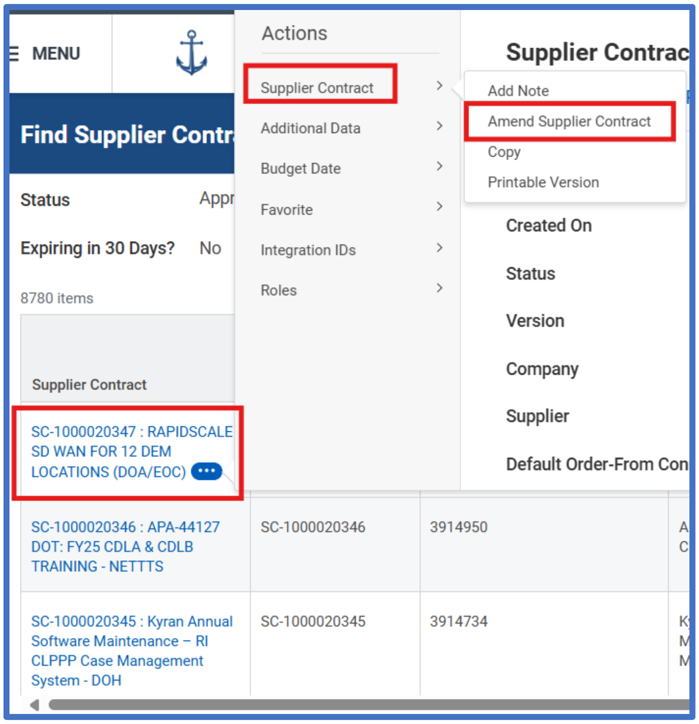
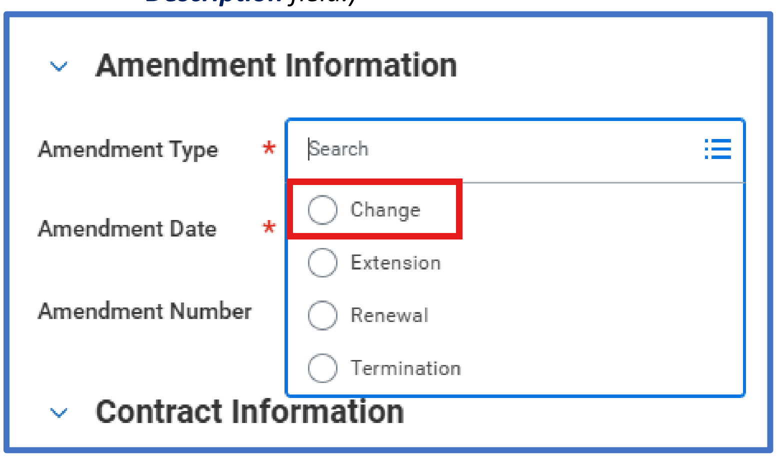
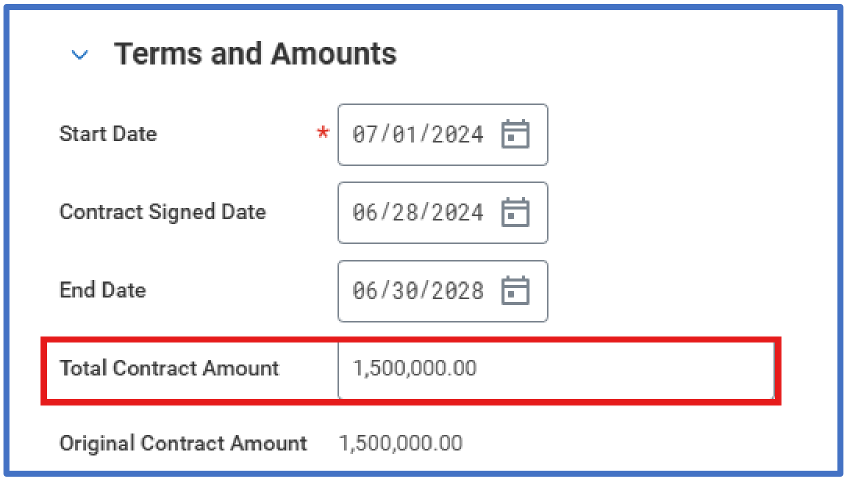


5. Use the menu icon in the **Amendment Type** field and select **Change.**
   (***Note:*** *This is a one-option field – enter additional reason/justification in the* ***Amendment Description*** *field.)*



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.
    *(**Note**: The "Original Contract Amount" corresponds to the "From" field, while the "Total Contract Amount" represents the "To" field. Ensure that the "Total Contract Amount" is updated to reflect the fully revised contract value.)*



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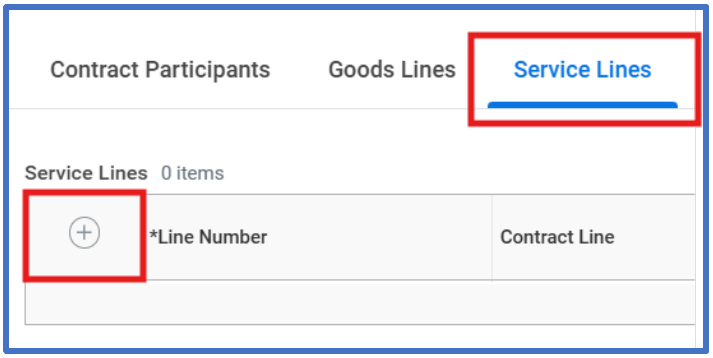

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    f. Appropriation
    g. Source of Funds
    h. Additional Worktags
14. Scroll down the page and select the **Attachments** tab.
    *(**Note**: If you are updating the **Catalog** you will need to upload the revised catalog and select the Attachment Category **Catalog**.)*
15. To provide an **Attachment**, select the arrow preceding > **Attachments.**
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