ERP Job Aid
## RI Enterprise Resource Planning

Release PO from Punchout

Requisition Type: Release PO from Punchout

Requisition Use: This requisition type is designated for a release from an Awarded Contract using the Suppliers Website.

- **MSC Industrial Supply Co**
    - **Supplier:** SID Tool Co
    - **Description:** Broad range of metalworking and maintenance, repair and operations (MRO) products and services.
- **NASPO**
    - **Supplier:** Multi
    - **Description:** NASPO Network – A variety of public procurement suppliers.
- **WB Mason**
    - **Supplier:** WB Mason Co Inc
    - **Description:** Office supplies, ink and toner, furniture, technology, break room and janitorial needs.
- **Grainger**
    - **Supplier:** W W Grainger
    - **Description:** MRO products, supplies and solutions for safety, health, facility and industry needs.
- **Fastenal**
    - **Supplier:** Fastenal Company
    - **Description:** Fastener distributor, wide range of products and services for various industries.
- **Dell**
    - **Supplier:** Dell Marketing LP
    - **Description:** Technology solutions, services and support.

Process for Submitting a Release PO from Punchout (Purchase Order)

1. In the ERP system, hover over Organization on the left panel toolbar.
2. Under Organization, select Requisitions.
   (**Note:** *If the 'Requisitions' app is not listed in your **Menu,** select **Customize** > Add Menu Items > type 'Requisitions' in the **Find Menu Items** field > select the plus-sign > select **Add Item** > select **Save Changes** > select **Save Changes.***)
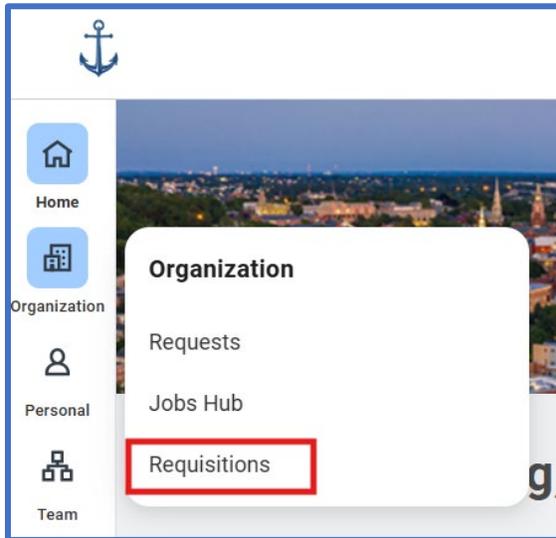
Requisition Details

1. For convenience, values from your last requisition display. To provide fresh information for a new requisition, under the heading, **Requisition Details**, select **Edit Details.**
2. 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.
3. **Company** name defaults to your **Company.**
4. The **Currency** field is automatically populated. If necessary, edit by selecting the menu icon, selecting **All Active Currencies**, and then making your selection.
5. To select a **Requisition Type**, select the menu icon, and then select **Release PO from Award.**
   (**Note:** *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.*)
6. To select a **Ship-To** location, select the menu icon, and then select the appropriate option to make your selection.
   (**Note:** *This is the address that the Supplier will see on the Printed Purchase Order.*)
7. Select **Save Changes.**
   (**Note:** *Required fields are indicated by a red asterisk.*)

Edit Requisition Details ✕

Requesting for *	☰
Requesting Entity	☰

Company *	✕ 028 Executive Office of Health and Human Services ☰
Currency *	✕ USD ☰
Requisition Type	✕ Release PO from Award ☰

Deliver-To	✕ Virks Bldg. ☰
Ship-To *	✕ 3 West Road, Cranston, RI 02920, United States of America ☰

Fund	✕ Fund: 010 General Fund ☰
Appropriation	✕ Appropriation: 22001 General Administration (EOHHS) ☰
Cost Center	☰
Grant	☰
Project Task	☰
Source of Funds	✕ Source of Funds: 01 General Revenue ☰
Additional Worktags	✕ Budgetary Control Category: PRG01 Program General Revenue ☰ ✕ Program: 0101028 Operations - Central Management - EOHHS

Save Changes   Cancel   Reset to Default

Ordering Methods

1. Under the heading, **Ordering Methods,** select **Connect to Supplier Website.**

Ordering Methods

🔲 **Search Catalog**
Search the internal catalog of preferred items and suppliers to add into the...

📝 **Request Non-Catalog Items**
Add a good or service that is not in the catalog

💻 **Connect to Supplier Website**
Request goods and services from Supplier Websites

📑 **Add from Templates and Requisitions**
Select from Requisition templates and past Requisitions

⭐ **Select from My Procurement Favorites**
Select from my Favorite items

Connect to Supplier Website

1. Using the Supplier Website list, locate Supplier and select **Connect** to be redirected to the Suppliers Website.
   (**Note:** *Please note that this process requires some time to complete, as indicated by the loading wheel.*)
2. Use the Suppliers Website to find the item(s) you wish to purchase, then select **Add to Cart**.

Mead Spiral 1 Subject Notebook, Wide Ruled, 8" x 10-1/2", White Paper, Assorted Covers, 70 Pages, 6 Notebooks/Pack

🚚 Delivers in 7-10 Business Days

MEA73063   **$9.30**/PK

QTY [1]   **ADD TO CART**

☐ Select   [Add To List ▼]

3. Select **Continue to Checkout** once complete.
   (**Note:** *If you are issuing a release for multiple items, continue adding them to your cart. Once all selections are made, proceed to checkout by selecting **Checkout**.*)

4. You will be redirected to Workday with your chosen item(s) in your cart.
5. Review the contents of the cart, and once ready, select **Checkout**.

6. Select **Submit**.

Approval Process

Once submitted, your requisition follows an approval workflow to view the workflow you can select the action button next to the requisition number, select view, and then select the Process History tab.