Guidesoft/Knowledge Services Temporary Staff Positions - Release PO from Award [MPA-569]

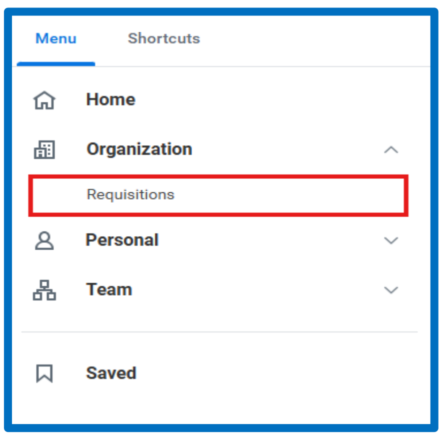
This job aid is specifically used for creating release POs from Guidesoft/Knowledge Services for temporary staffing positions (Workday Supplier Contract Number SC-1000000311). Agencies must continue to utilize the Knowledge Services dotStaff platform for all recruitment/interview/hiring processes.

Mandatory Attachment to Requisition

- **Prior to Entering Workday Requisition:** Complete "MPA 569 - Knowledge Services Temp Staffing Requisition Upload Attachment" listing each position (for attachment to requisition). Completion instructions are on the template, which can be downloaded at https://ridop.ri.gov/media/1616/download.
- **Requisition Type:** Release PO from Award.

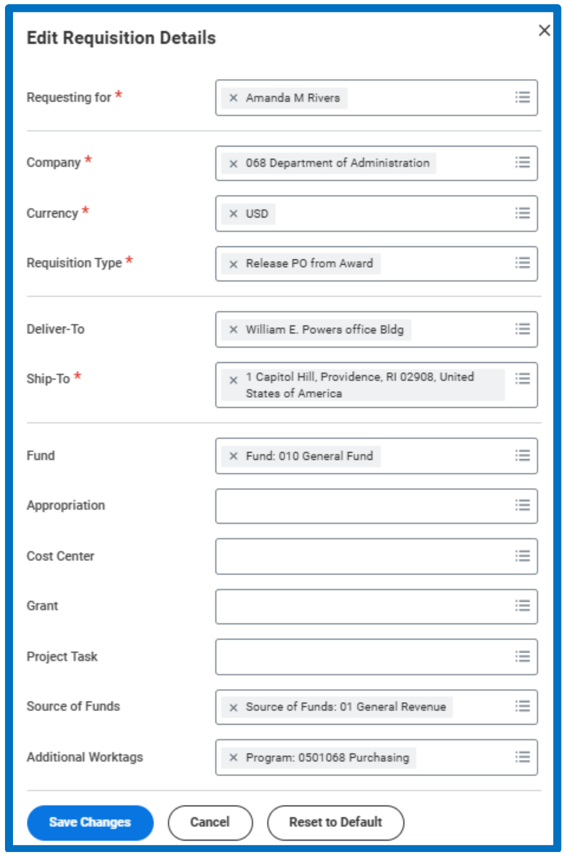
Process for Submitting a Release PO from Award (SC-1000000311)

1. In Workday, 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**.)*



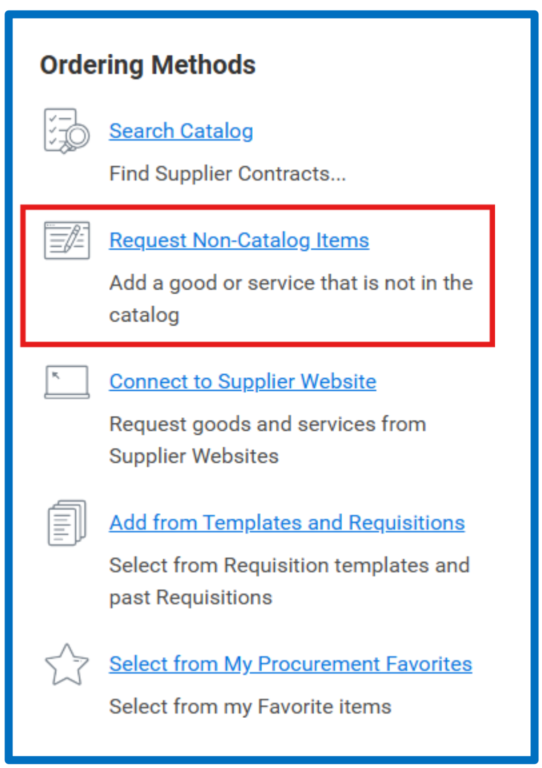
Requisition Details

3. Values from your last requisition will automatically display; to provide 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** (i.e., State agency/Department).
6. The **Currency** field is automatically populated as USD. 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 "Release PO from Award."
8. 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 issued Purchase Order.)*
9. Select **Save Changes.**
   *(**Note**: Required fields are indicated by a red asterisk.)*
10. Select **Start Requisition**.



Ordering Methods

11. Select **Request Non-Catalog Items**.

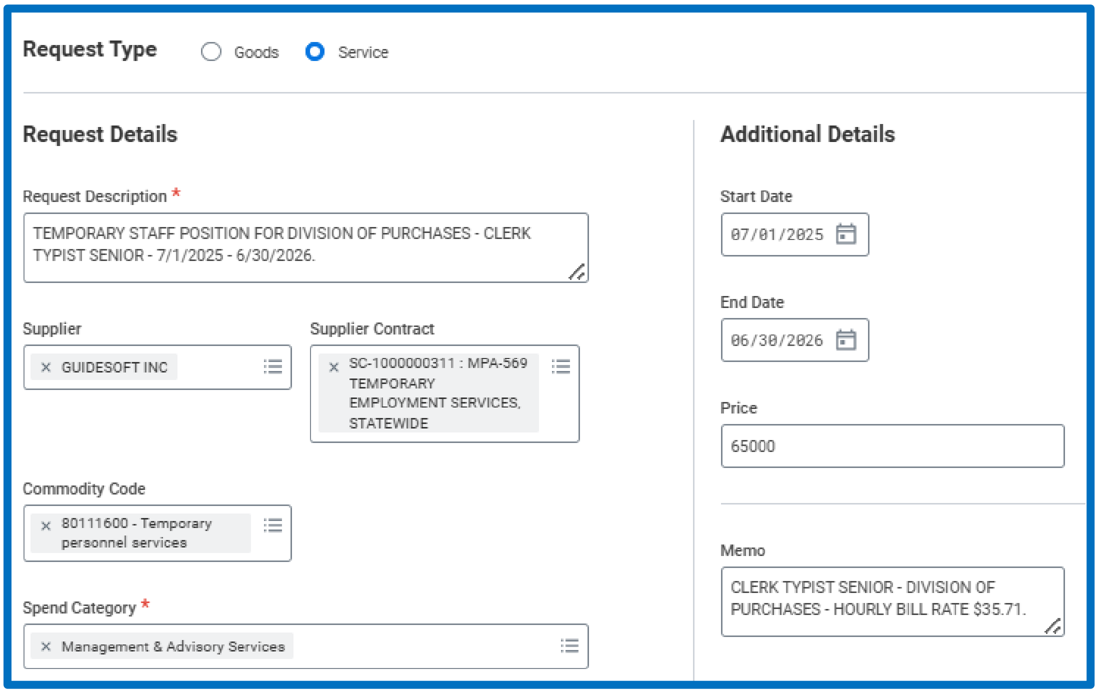


Request Type

12. Select **Service**.

Request Details

13. Under the heading **Request Details**, type GUIDESOFT into the **Supplier** field and the entity GUIDESOFT INC will auto-populate.
14. To initiate a release from a **Supplier Contract**, select the menu icon, then choose the appropriate **Supplier Contract** from the list (SC-1000000311: MPA-569 TEMPORARY EMPLOYMENT SERVICES, STATEWIDE).
15. Type 80111600 into the **Commodity Code** field and the commodity code 80111600 – TEMPORARY PERSONNEL SERVICES will auto-populate.
    *(**Note**: By selecting this **Commodity Code**, the field **Spend Category** will auto-populate.)*
16. Type in total **Price.**
    *(**Note**: Please enter numbers only, no dollar signs; this price should be the total amount of the full engagement of the temporary staff position for the requested duration, i.e. 65000)*
17. As needed, type comments in the **Memo** field.



18. Select **Add to Cart** (button located at bottom lefthand side of screen).
19. Review the contents of the cart, and once ready, select **Checkout**.
    *(**Note**: An error message will generate to remind you that an attachment is required; please follow the below steps to attach the "MPA 569 - Knowledge Services Temp Staffing Requisition Upload Attachment".)*

Requisition Information

20. Review and if necessary, edit the **Request Date** to align with the temporary staff position start date (cannot be a date in the past).
21. Review all remaining fields as needed; mandatory fields are marked with an asterisk.
    *(**Note**: For the **Sourcing Buyer** field, type in AUTO CREATE and the field will automatically update to BUYER AUTO CREATE [C].)*

Services

22. Under the heading **Services**, review the information that you entered and then, if necessary, edit any missing and/or incomplete fields. You may need to use the horizontal scroll bar to view the entire row.
    (**Note**: *To add a new row, select the plus-sign icon; to remove a row, select the minus-sign icon.)*
23. Use the horizontal scroll bar to navigate to the **Appropriation** field; to specify an **Appropriation**, type in the appropriate **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.)*

24. 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.)*

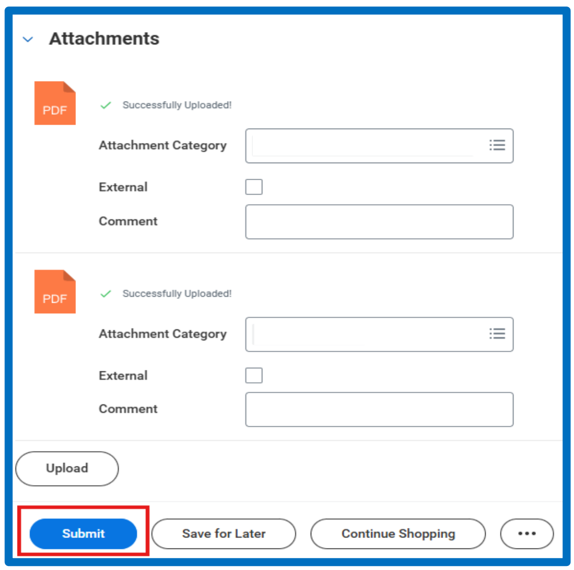
25. If the **Source of Funds** did not automatically populate from the **Appropriation** selected above, to specify a **Source of Funds**, select the menu icon, and then make your selection.

Attachments

26. Select the arrow next to the **Attachments** header, which will open a box where you can select "Select Files". Add your completed "MPA-569 – Knowledge Services Temp Staffing Requisition Upload Attachment".

27. Select "Supporting Documentation" option for the Attachment Category.

28. Select the "External" box to ensure that the template is published with the release PO (Guidesoft/Knowledge Services must receive this document attached to the PO to ensure correct billing in dotStaff platform).



29. Select **Submit** button when complete (bottom lefthand side of screen).

Mandatory Attachment to Requisition Verification

Ensure that the required "MPA-569 - Knowledge Services Temp Staffing Requisition Upload Attachment" is attached to your PO. If the document is not attached to the PO, you must submit a Change Order inclusive of these three conditions:

- Upload the completed "MPA-569 – Knowledge Services Temp Staffing Requisition Upload Attachment";
- Flag the upload as "External" (see above step no. 28);
- Add a note indicating that the change order is being filed to attach MPA-569 – Knowledge Services Temp Staffing Requisition Upload Attachment to PO.

Approval Process

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