



Workday Re-Creation Guide

In Workday, **Contract Catalogs** (Blanket Purchase Agreements) are designated exclusively for goods-related purchases. For **goods lines**, the entire quantity must be received (no decimals allowed) before payment can be processed.

For service-based engagements, an award must be established as a **Contract**. **Service lines** provide greater flexibility, allowing receipts and payments to be processed based on either quantity or price, which supports partial payments.

- When “Service” is selected as the request type during the Workday requisition process, the quantity and unit of measure fields are not available. Instead, the total dollar amount of the engagement should be entered in the Price field.
- This configuration enables partial receipts once the Supplier Contract is issued.
- Upon receiving invoices, the requisitioner can enter the exact invoice amount directly into the Price field for payment processing.

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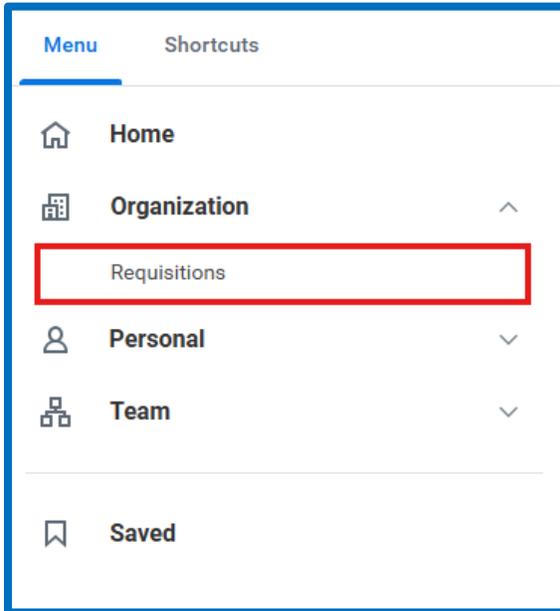
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Purchase Orders Not Migrated to Workday

Instructions for recreating a RIFANS Standard PO that did not migrate to Workday.

Initiate New Requisition in Workday

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

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**.
(**Note:** These fields must be completed in a top-down sequence. Begin at the top and proceed down to ensure all fields are correctly entered.)
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 **Other**.
(**Note:** Alternatively, type in a Requisition Type, select enter to search, and then select from the search results.)
6. To select a **Deliver-To** location, select the menu icon, and then select the appropriate option to make your selection.
(**Note:** Deliver-To locations are designated as 'Par' location types. This classification reflects internal delivery instructions once items have arrived at the corresponding Ship-To location.)
(**Note:** Alternatively, you may search by location name or select Deliver-To by Ship-To Locations to select the correct location name. Please be aware that this field cannot be searched by address.)
7. The **Ship-To** location field is automatically populated based on your selected Deliver-To location.
(**Note:** The Ship-To location refers to the shipping address for the carrier, which serves as the official mailing address for deliveries.)
(**Note:** The Deliver-To location will not automatically populate if the Ship-To address is selected first.)
8. 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

✕ MPA Mini Bid

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

✕ Budgetary Control Category: PRG01 Program General Revenue

✕ Program: 0101028 Operations - Central Management - EOHHS

Save Changes

Cancel

Reset to Default

Ordering Methods

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

Ordering Methods

[Search Catalog](#)
 Find Supplier Contracts...

[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

Support: DOA.ERPFINANCE@doa.ri.gov

12/05/2025 v1

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Request Type

1. Select **Service**.

Request Details

1. Under the heading **Request Details**, enter the following information in the **Request Description** field:
 - a. **Example** : *The purpose of this Requisition is to create a new Purchase Order for the former RIFANS Purchase Order that did not get migrated into ERP. Original PO # ___ - Requisition Type – Vendor Name. Remaining Control Value \$_____ Current Buyer _____.*
2. 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.)
3. 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.)
4. Type in a **Price**.
(**Note**: Please enter numbers only, no dollar signs. This should be the remaining RIFANS balance.)
5. Select **Add to Cart**.

The screenshot shows a web form for creating a requisition. At the top, there's a 'Request Type' section with 'Goods' selected. The 'Request Details' section includes input fields for 'Supplier Item Identifier', 'Supplier', 'Supplier Contract', 'Commodity Code', 'Request Description*', and 'Spend Category*'. The 'Pricing' section has fields for 'Quantity*', 'Unit of Measure*', 'Price', and 'Subtotal \$'. A 'Memo' field is at the bottom right. At the bottom left, the 'Add to Cart' button is highlighted with a red box, and there is a 'Back to Requisitions Home' button.

6. 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.)
7. 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

1. Review, and if necessary, edit the **Request Date**.
2. Review, and if necessary, edit **Currency**.
3. Review, and if necessary, edit **Requisition Type**, and then scroll down.

(**Note:** Required fields are indicated by a red asterisk.)

Service

1. Under the heading, **Service**, review the information that you entered and then, if necessary, edit.
(**Note:** To add a new row, for additional lines, 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.)
2. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
3. Select the menu icon and make your selection.
4. Use the horizontal scroll bar to navigate to the **Appropriation** field.
5. 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.)
6. 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.)
7. 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

1. 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.)
(**Note:** You **must** submit the most recent version of the RIFANS PO, all related attachments, and the latest RIFANS Change Order as applicable.)
2. Select **Submit**.

Attachments

PDF Successfully Uploaded!

Attachment Category:

External:

Comment:

PDF Successfully Uploaded!

Attachment Category:

External:

Comment:

Upload

Submit 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**)*

Ordering

[PO-1000000042](#)

Status: Approved

Contact:

Supplier:

Printed Date	Issue Option	PDF File
04/25/2025 11:05:10 AM	Print	PO-1000000042 2025-04-25 08_05_10-0700.pdf

Supplier Contracts/Catalogs Not Migrated to Workday

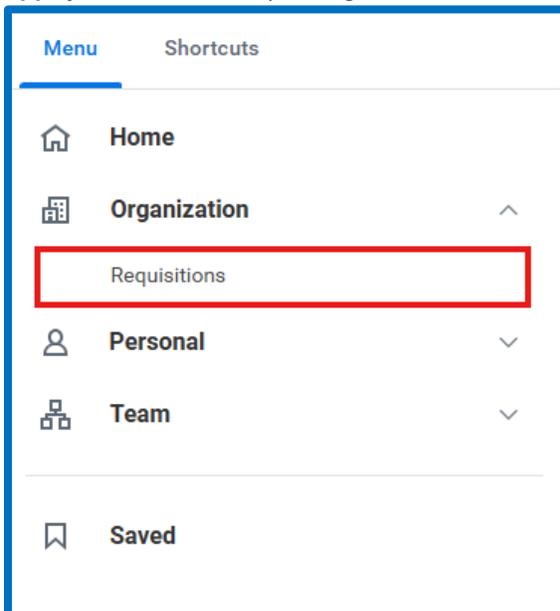
Instructions for recreating a RIFANS Blanket or Contract that did not migrate to Workday.

Only follow the below steps if recreating a Blanket Purchase Agreement:

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**.

Initiate New Requisition in Workday

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

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**.
(**Note:** These fields must be completed in a top-down sequence. Begin at the top and proceed down to ensure all fields are correctly entered.)
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 **Other**.
(**Note:** Alternatively, type in a Requisition Type, select enter to search, and then select from the search results.)
6. To select a **Deliver-To** location, select the menu icon, and then select the appropriate option to make your selection.
(**Note:** Deliver-To locations are designated as 'Par' location types. This classification reflects internal delivery instructions once items have arrived at the corresponding Ship-To location.)

(Note: Alternatively, you may search by location name or select Deliver-To by Ship-To Locations to select the correct location name. Please be aware that this field cannot be searched by address.)

- The **Ship-To** location field is automatically populated based on your selected Deliver-To location.
(Note: The Ship-To location refers to the shipping address for the carrier, which serves as the official mailing address for deliveries.)
(Note: The Deliver-To location will not automatically populate if the Ship-To address is selected first.)
- Select **Save Changes**.
(Note: Required fields are indicated by a red asterisk.)

Edit Requisition Details [X]

Requesting for * []

Requesting Entity []

Company * [x 028 Executive Office of Health and Human Services]

Currency * [x USD]

Requisition Type []

Deliver-To [x Virks Bldg.]

Ship-To * [x 3 West Road, Cranston, RI 02920, United States of America]

Fund [x Fund: 010 General Fund]

Appropriation [x Appropriation: 22001 Office of Health and Human Services]

Cost Center []

Grant []

Project Task []

Source of Funds [x Source of Funds: 01 General Revenue]

Additional Worktags [x Budgetary Control Category: PRG01 Program General Revenue]
[x Program: 0101028 Operations - Central Management - EOHHS]

Save Changes [Cancel] [Reset to Default]

Ordering Methods

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

Ordering Methods

-  [Search Catalog](#)
 Find Supplier Contracts...
-  [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

Request Type

1. Select **Service**.

Request Details

1. Under the heading **Request Details**, enter the following information in the **Request Description** field:
 - a. **Example** : *The purpose of this Requisition is to create a new Contract/Catalog for the former Blanket/Contract Purchase Agreement that was not migrated into ERP. Original PO # ____ - Requisition Type – Vendor Name – Term Dates and Remaining Option Years (as applicable). Remaining Control Value \$____ Current Buyer _____.*
2. 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.*)
3. 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.*)
4. Type in a **Price** as \$0.00.
 (**Note:** *Please enter numbers only, no dollar signs.*)
5. Select **Add to Cart**.
6. 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.*)

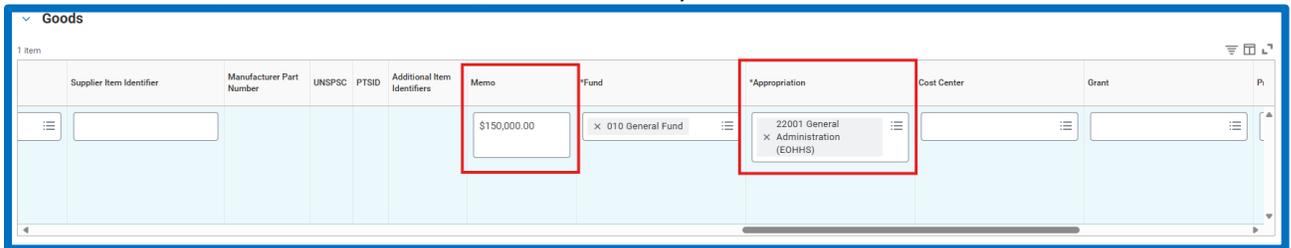
Requisition Information

1. Review, and if necessary, edit the **Request Date**.
2. Review, and if necessary, edit **Currency**.
3. Review, and if necessary, edit **Requisition Type**.
4. Type in **Remaining Control Value** and **Term Dates** in the header internal memo, and then scroll down.
(**Note:** Required fields are indicated by a red asterisk.)

Service

1. Under the heading, **Service**, review the information that you entered and then, if necessary, edit.
(**Note:** To add a new row, for additional lines, 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.)
2. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
3. Select the menu icon and make your selection.

4. Use the horizontal scroll bar to navigate to the **Memo** field.
5. Type in **Remaining Control Value** per appropriation/program in the line **Memo** field.
6. Use the horizontal scroll bar to navigate to the **Appropriation** field.
7. 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.)
8. 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.)
9. 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: If this is for a Blanket Purchase Agreement you **must** upload your completed Submit Catalog Load Excel Template with the **Attachment Category** of **Catalog** for this to become a Contract Catalog.)

1. 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.)

(Note: You **must** submit the most recent version of the RIFANS PO, all related attachments, and the latest RIFANS Amendment as applicable.)

Attachments

 Tentative Selection Documentation.pdf
Uploaded by Jason J Pagano (44547)

Attachment Category Tentative Award Documentation

External

Comment (empty)

 SOW Email with Vendor Responses.pdf
Uploaded by Jason J Pagano (44547)

External

Comment (empty)

 MPA-498 Fence Installation and Repair.xlsx
Uploaded by Jason J Pagano (44547)

Attachment Category Catalog

External

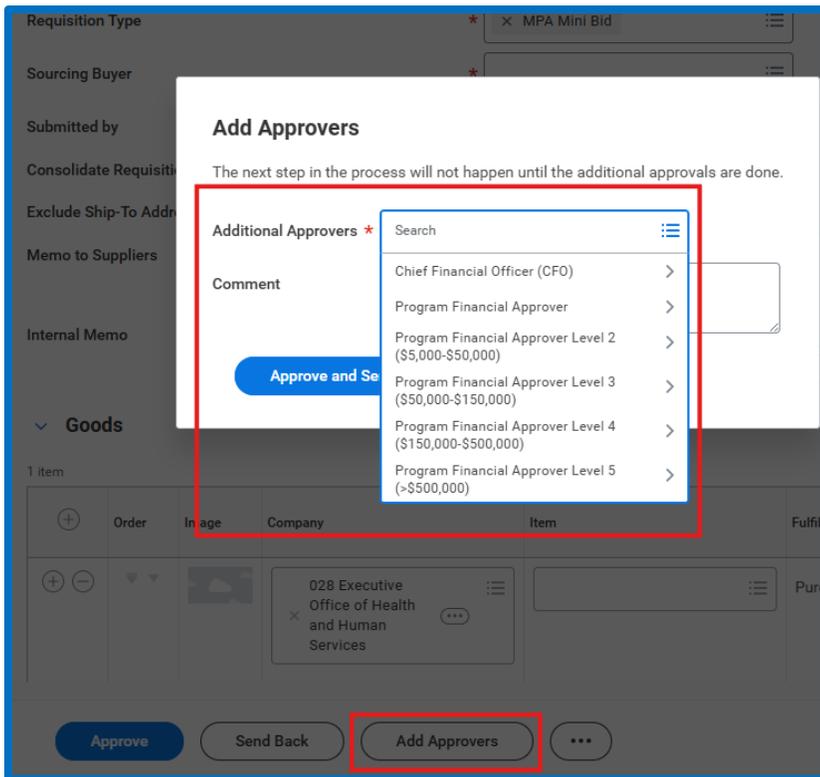
Comment (empty)

2. Select **Submit**.

Approval Process

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

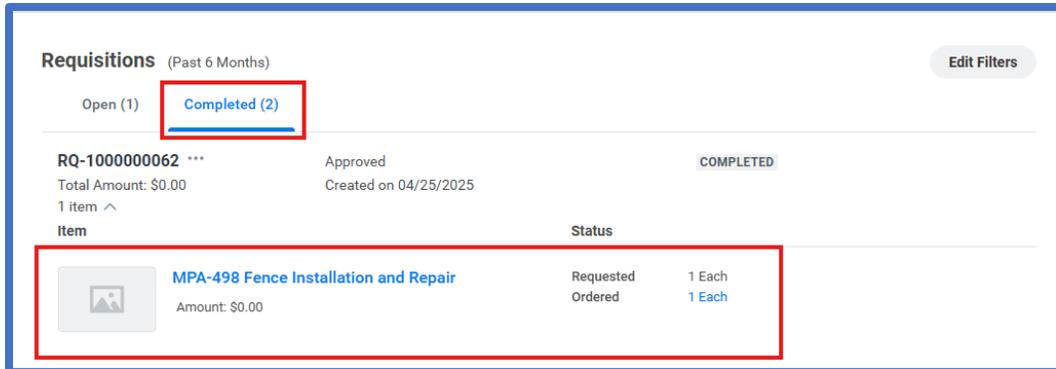




Requisitioner:

Final Steps

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.

▼ **Requisition Information**

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

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**.

Top Results People (0) Tasks and Reports (0) **Procurement (1) ▼**

Procurement

[SC-1000000010 : MPA-498 Fence Installation and Repair MiniBid](#)
 Supplier Contract

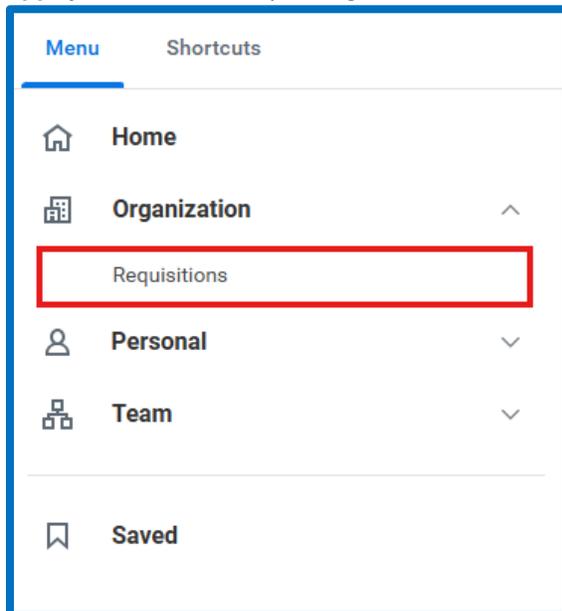
Request for a Migrated Unusable Contract Catalog to be Replaced with a Contract

Instructions for replacing a RIFANS Contract Catalog migrated to Workday containing an unusable \$1.00 Catalog/Goods Line Unit of Measure with a Contract.

Using agencies must submit a new requisition in Workday to permit Purchases to issue a replacement Supplier Contract for the remaining contract term and unspent balance.

Initiate New Requisition in Workday

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

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**.
(**Note:** These fields must be completed in a top-down sequence. Begin at the top and proceed down to ensure all fields are correctly entered.)
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 **Other**.
(**Note:** Alternatively, type in a Requisition Type, select enter to search, and then select from the search results.)
6. To select a **Deliver-To** location, select the menu icon, and then select the appropriate option to make your selection.
(**Note:** Deliver-To locations are designated as 'Par' location types. This classification reflects internal delivery instructions once items have arrived at the corresponding Ship-To location.)
(**Note:** Alternatively, you may search by location name or select Deliver-To by Ship-To Locations to select the correct location name. Please be aware that this field cannot be searched by address.)
7. The **Ship-To** location field is automatically populated based on your selected Deliver-To location.

(Note: The Ship-To location refers to the shipping address for the carrier, which serves as the official mailing address for deliveries.)

(Note: The Deliver-To location will not automatically populate if the Ship-To address is selected first.)

8. Select **Save Changes**.

(Note: Required fields are indicated by a red asterisk.)

The screenshot shows the 'Edit Requisition Details' form with the following fields and values:

- Requesting for***: (Empty)
- Requesting Entity**: (Empty)
- Company***: 028 Executive Office of Health and Human Services
- Currency***: USD
- Requisition Type**: (Empty)
- 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**: (Empty)
- Grant**: (Empty)
- Project Task**: (Empty)
- Source of Funds**: Source of Funds: 01 General Revenue
- Additional Worktags**:
 - Budgetary Control Category: PRG01 Program General Revenue
 - Program: 0101028 Operations - Central Management - EOHHS

At the bottom, there are three buttons: **Save Changes** (highlighted in red), **Cancel**, and **Reset to Default**.

Ordering Methods

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

Ordering Methods

-  [Search Catalog](#)
 Find Supplier Contracts...
-  [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

Request Type

1. Select **Service**.

Request Details

1. Under the heading **Request Details**, enter the following information in the **Request Description** field:
 - a. **Example** : *The purpose of this requisition is to create a new Supplier Contract for former Blanket Purchase Agreement that migrated into ERP as a Contract Catalog. Original RIFANs Blanket Purchase Agreement number is XXXXXXXX. Remaining contract term is _____, 20XX – _____, 20XX with _____ extension/option year(s) through _____, XXXX remaining on the contract term. Remaining/unspent control value on the contract is \$XXXXXX.*
2. 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.)
3. 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.)
4. Type in a **Price** as \$0.00.
 (**Note:** Please enter numbers only, no dollar signs.)
5. Select **Add to Cart**.
6. 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 Type Goods Service

Request Details

Supplier Item Identifier: Supplier:

Supplier Contract: Commodity Code:

Request Description*:

Spend Category*:

Pricing

Quantity*:

Unit of Measure*:

Price:

Subtotal \$0.00 USD

Memo:

Add to Cart

Requisition Information

1. Review, and if necessary, edit the **Request Date**.
2. Review, and if necessary, edit **Currency**.
3. Review, and if necessary, edit **Requisition Type**.
4. Type in **Remaining Control Value** and **Term Dates** in the header internal memo, and then scroll down.
(**Note:** Required fields are indicated by a red asterisk.)

Requisition Information

Request Date *

Currency *

Requisition Type *

Submitted by

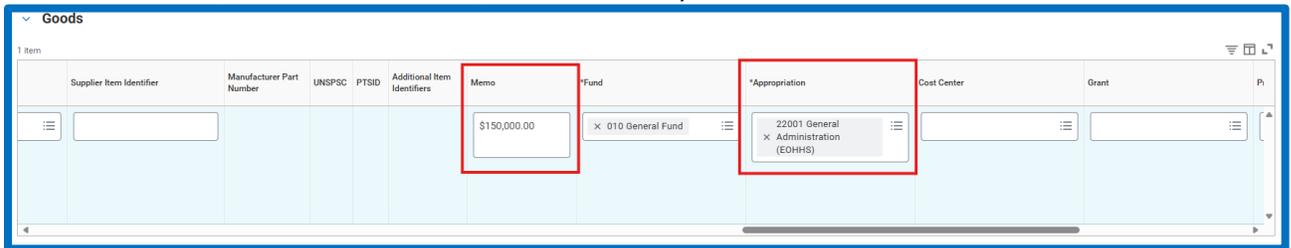
Memo to Suppliers

Internal Memo

Service

1. Under the heading, **Service**, review the information that you entered and then, if necessary, edit.
(**Note:** To add a new row, for additional lines, 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.)
2. Use the horizontal scroll bar to navigate to the **Order-From Connection** field.
3. Select the menu icon and make your selection.

4. Use the horizontal scroll bar to navigate to the **Memo** field.
5. Type in **Remaining Control Value** per appropriation/program in the line **Memo** field.
6. Use the horizontal scroll bar to navigate to the **Appropriation** field.
7. 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.)
8. 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.)
9. 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

1. 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.

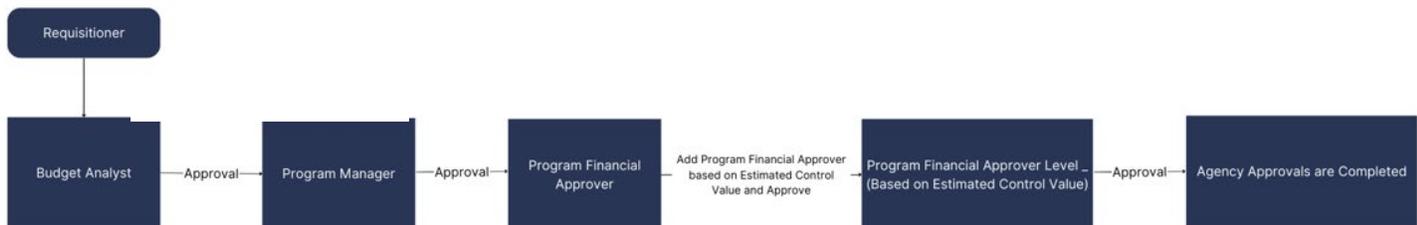
(Note: To attach more documents, select **Upload**. To remove an attachment, select the trash can icon.)

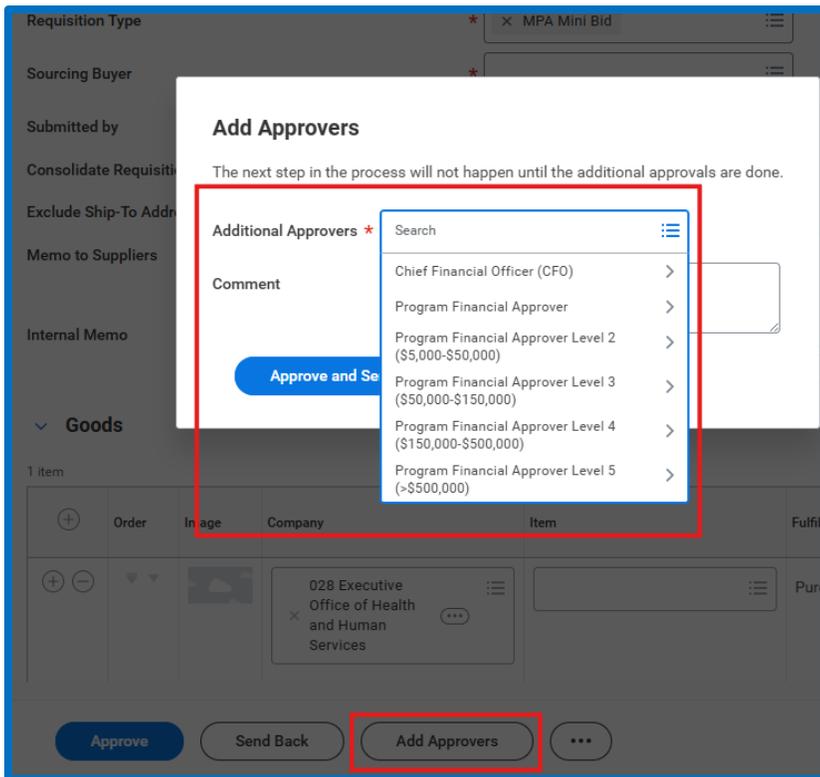
(Note: You **must** submit the most recent version of the RIFANS PO, all related attachments, and the latest RIFANS Amendment as applicable.)

2. Select **Submit**.

Approval Process

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

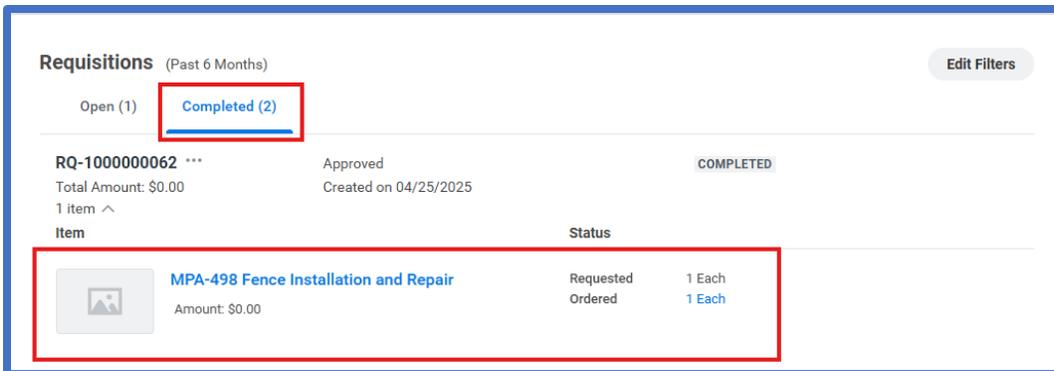




Requisitioner:

Final Steps

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.

▼ Requisition Information	
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

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**.

Top Results	People (0)	Tasks and Reports (0)	Procurement (1) ▼
-------------	------------	-----------------------	-------------------

Procurement

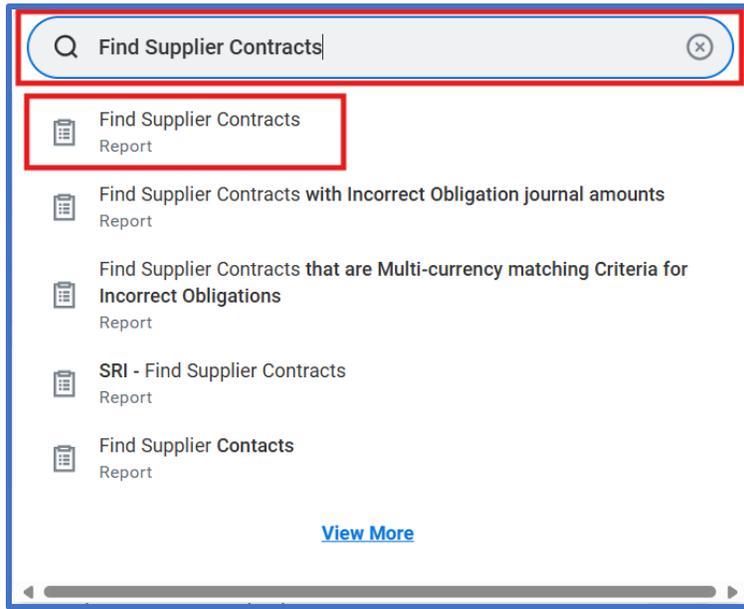
[SC-1000000010 : MPA-498 Fence Installation and Repair MiniBid](#)
Supplier Contract

Submit Amendment for Termination of Migrated Contract Catalog

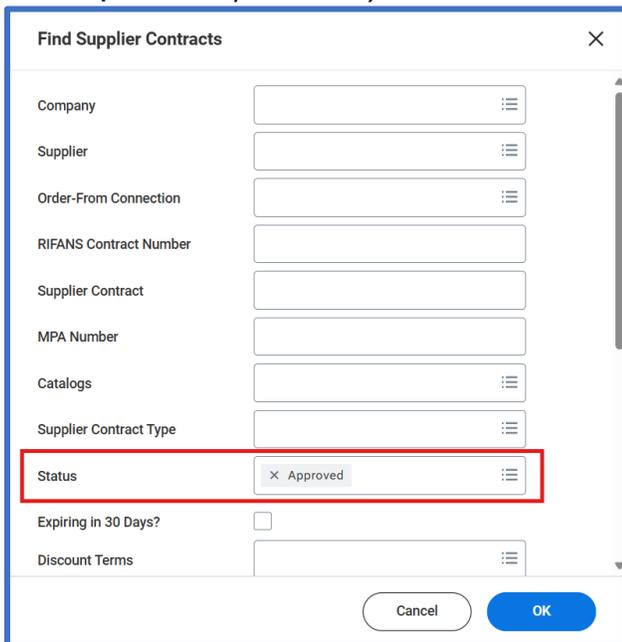
Once the new Supplier Contract is issued in Workday, using agency staff must then submit a Amendment to cancel the migrated Contract Catalog (which will then inform/flag to the Purchases Buyer that cancellation of the migrated award is appropriate without a gap in coverage periods).

Cancellation may only be effectuated by Purchases once all pending invoices have been paid against the migrated Contract Catalog and/or all related releases have been cancelled/reduced down to amount expended.

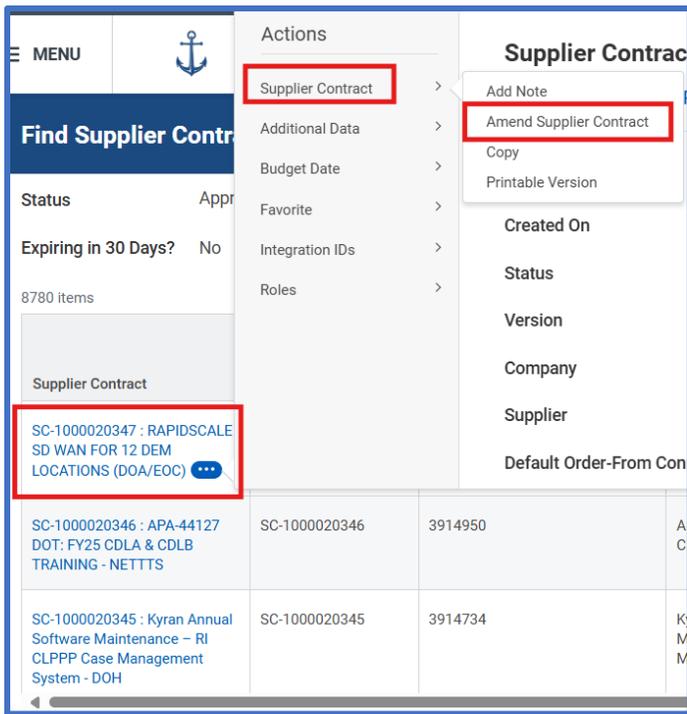
1. Using the Workday Search Bar, type **Find Supplier Contracts** and select the report.



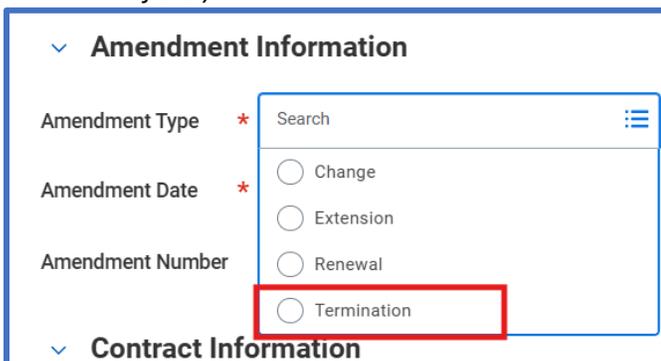
2. Filter the **Status** field to **Approved** and select **OK**.
(*Note: This process may take a while to load as indicated by the loading symbol.*)



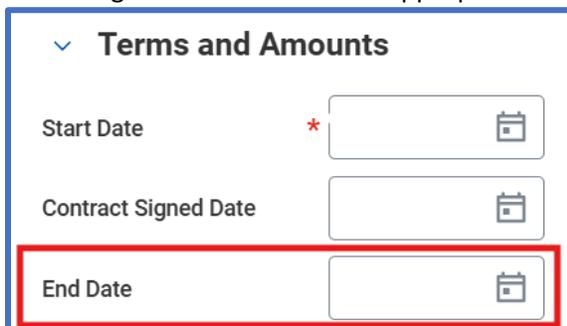
3. Locate the **Supplier Contract** you are initiating an Amendment to and select the related actions button next to the Supplier Contract title.
4. Hover over **Supplier Contract** and select **Amend Supplier Contract**.



- 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.*)



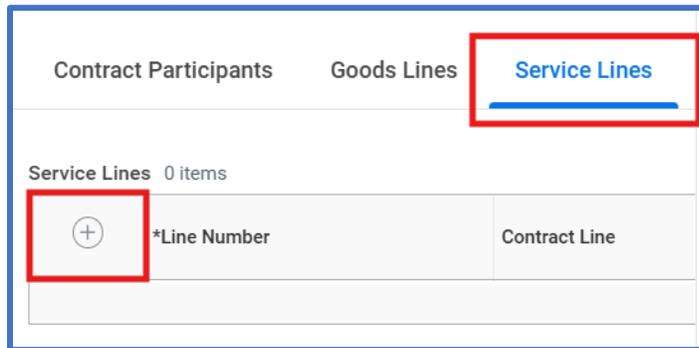
- The **Amendment Date** defaults to today's date.
- If applicable, enter the **Amendment Number** in the **Amendment Number** field.
- Enter additional information to support the amendment type in the **Amendment Description** field.
 - Example: *The purpose of this Termination is to create a new Contract for the former Blanket Purchase Agreement that migrated into ERP as a contract Catalog. New Requisition number _____.*
- Scroll to the **Terms and Amounts** heading.
- 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

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](#)

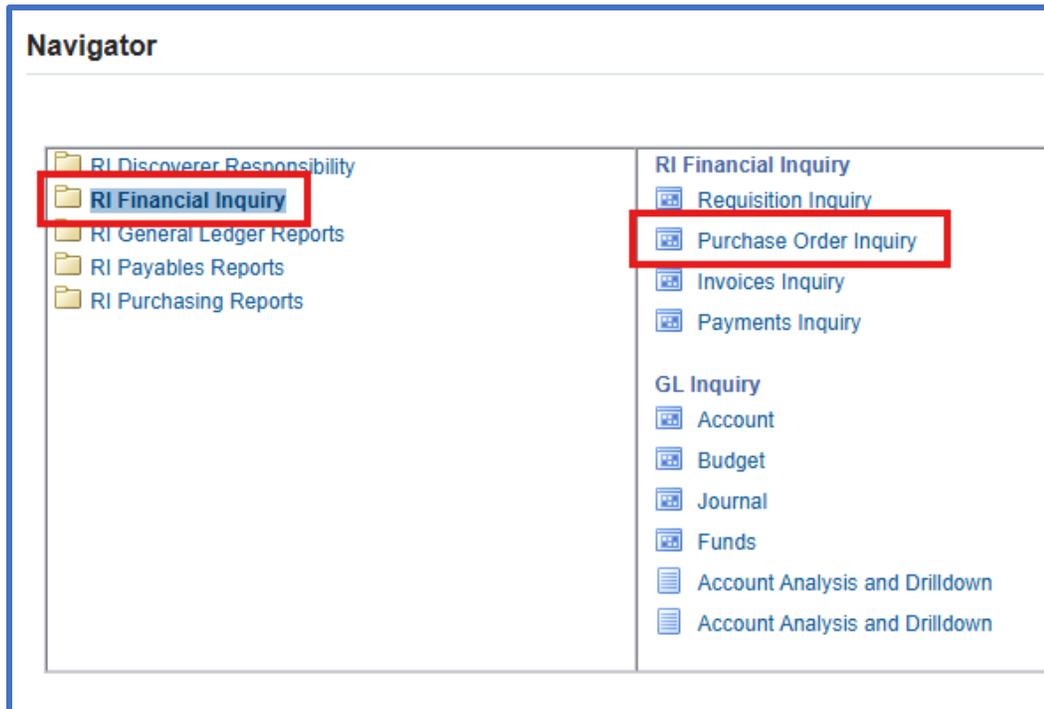
3 minutes ago

Attachment Category (empty)

Comment (empty)

How To Download Attachments and Control Value from RIFANS

1. Login to RIFANS using the username and password: **Inquiry**
2. Under the heading **Navigator**, select **RI Financial Inquiry**.
3. Select **Purchase Order Inquiry**.

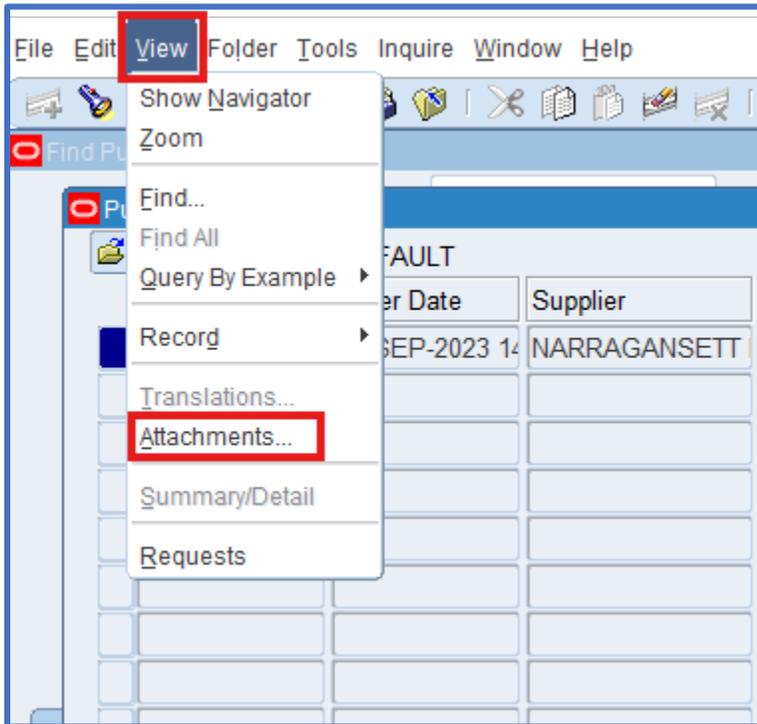


4. In the **Number** field, enter the relevant Purchase Order, Contract, or Contract Catalog number.
5. Select **Find**.

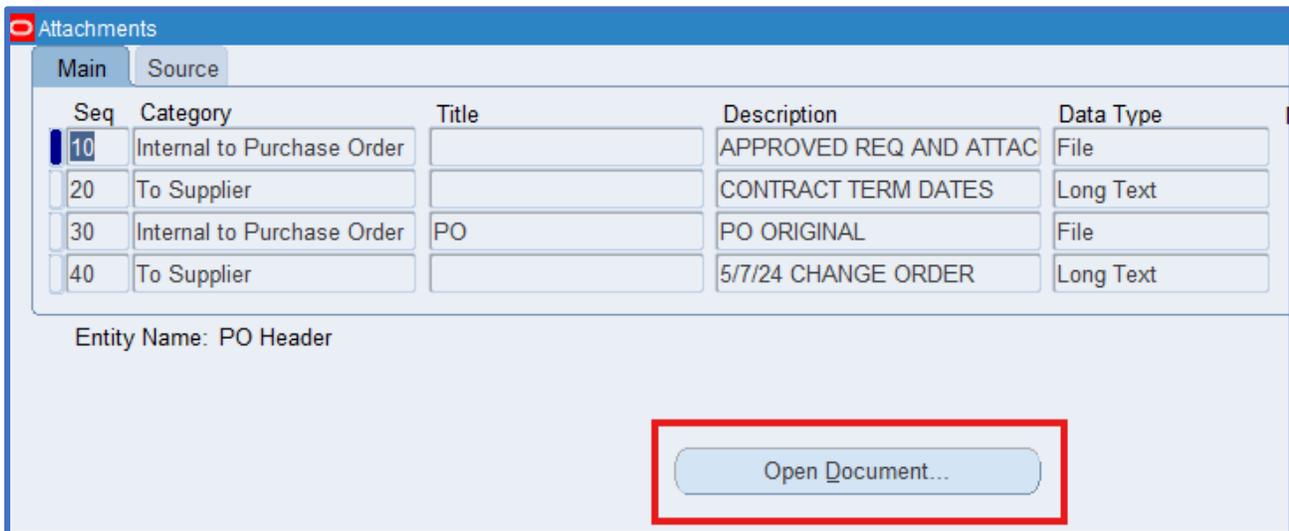
The screenshot shows the 'Find Purchase Orders' search window. The 'Operating Unit' is set to 'State of Rhode Island'. The 'Number' field is highlighted with a red box. Other fields include 'Release', 'Supplier', 'Ship-To Org', 'Bill-To', 'Ship-To', 'Line', and 'Shipment'. On the right, there are fields for 'Type', 'Currency', 'Site', 'Line Type', and 'Buyer', along with checkboxes for 'Show External Locations', 'View Releases', 'Consumption Advice', 'Global Agreement', and 'With Contract Terms'. At the bottom, there are tabs for 'Line', 'Date Ranges', 'Status', 'Related Documents', 'Deliver To', 'Accounting', and 'Projects'. Below the tabs are input fields for 'Item, Rev', 'Category', 'Description', 'Supplier Item', 'VMI', and 'Consigned'. On the right side, there is a 'Results' section with radio buttons for 'Headers', 'Lines', 'Shipments', and 'Distributions'. At the bottom right, the 'Find (J)' button is highlighted with a red box.

6. Select **View**.

7. Select **Attachments**.

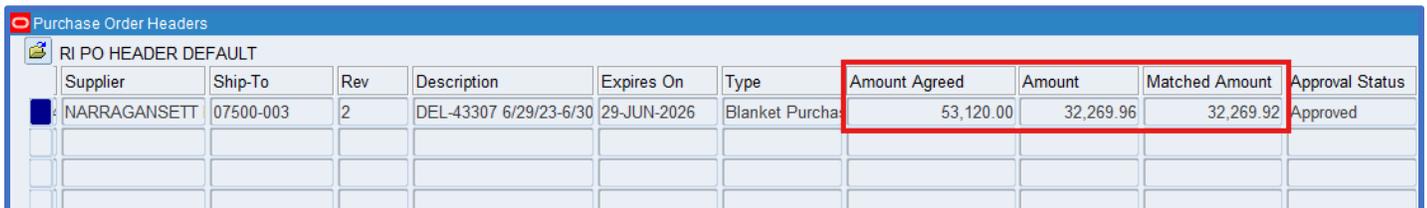


8. Locate and open the relevant attachment(s) by selecting **Open Document**.



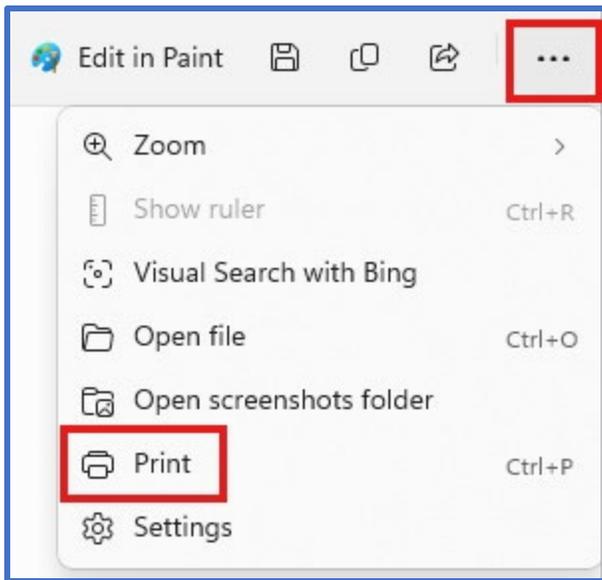
9. Capture a screenshot (snip) of the Amount Agreed, Amount, and Matched Amount fields.

(Note: Press the Windows logo key + Shift + S on your keyboard to initiate the snipping tool.)



10. In the snip toolbar, select the actions button (three dots).

11. Select **Print**.



12. Select Microsoft Print to PDF as the printer.
13. Select **Print**.
14. Choose a destination folder, enter a File Name and select Save.