ERP Job Aid
RI Enterprise Resource Planning

Create a Requisition for a Solicitation

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

Solicitation Types:

(**Note:** *This list highlights the most frequently used solicitation types and does not represent all available solicitation methods.)*

- **Request for Quote (RFQ)**

Solicitation Type: Goods

Overview: RFQs are evaluated primarily on cost, with awards typically granted to the lowest responsive and responsible bidder.

Details:

- Includes at least one line item for pricing proposals.
- RFQs may be issued for:
    - One-time purchases
    - Ongoing purchases under fixed pricing agreements

RFQ Use Cases:

Purchase Type	Example	Resulting Agreement
One-Time Purchase	Promotional items for a special event	Purchase Order
Time-Based Purchase	Fixed pricing for autobody parts over a three-year period	Contract Catalog

- **Request for Proposal (RFP)**

Solicitation Type: Services

Overview: RFPs are evaluated based on both technical and cost proposals. They are used for service-based procurements requiring detailed proposals.

Details:

- Two-envelope evaluation:
    - One envelope for technical proposal
    - One sealed envelope for cost proposal
- No line items.
- RFPs may be issued for:
    - Defined-duration projects

RFP Use Cases:

Purchase Type	Example	Resulting Agreement
Project-Based Contract	Lump sum price to provide consulting services	Contract

- **Request for Information (RFI)**

Solicitation Type: Services

Overview: RFIs are exploratory and do not result in a contract award. They are used to gather insights, ideas, and feedback from the vendor community in preparation for a future procurement.

Details:

- Does not result in an award.
- Allows agencies to engage with the vendor community to obtain information and ideas around a future procurement, in an open and transparent format.
- Ultimately canceled one information is collected.

Table of Contents

Table of Contents 2

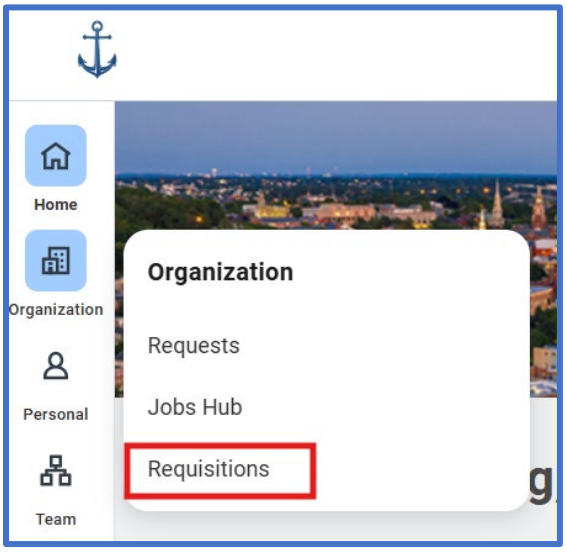
Process for Submitting a Requisition to Purchase Order 3

Process for Submitting a Requisition to Contract 9

Process for Submitting a Requisition to Contract Catalog 18

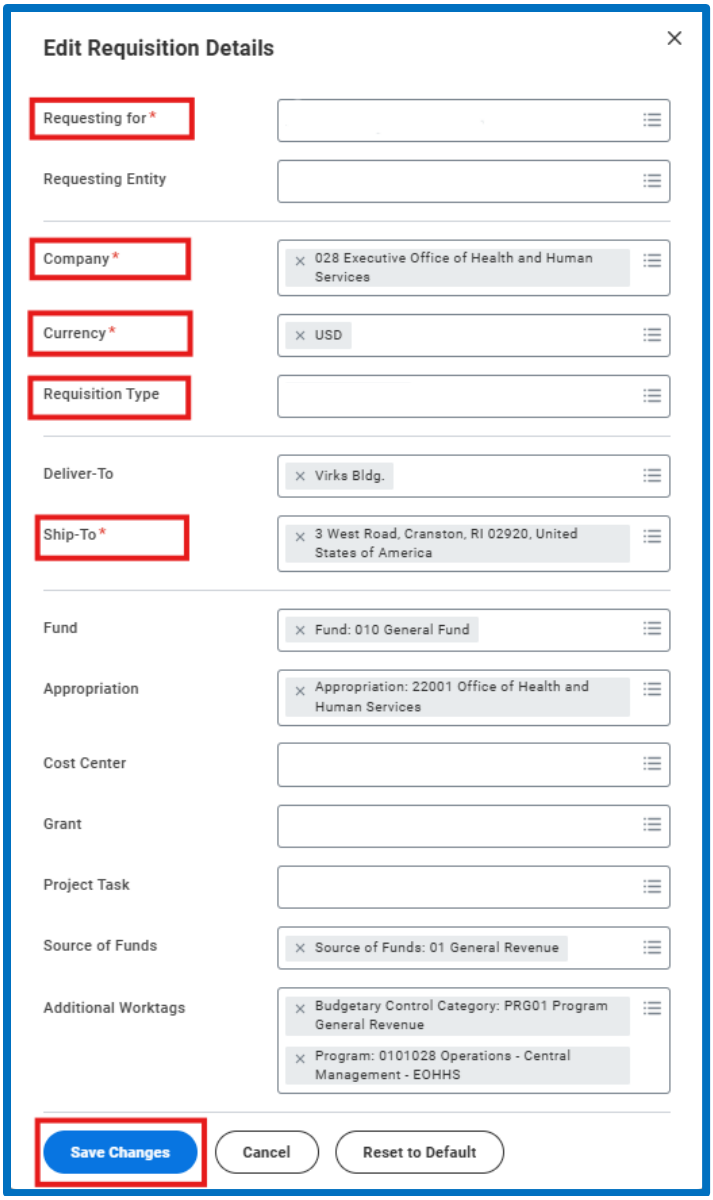
Process for Submitting a Requisition to Purchase Order

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.****)*



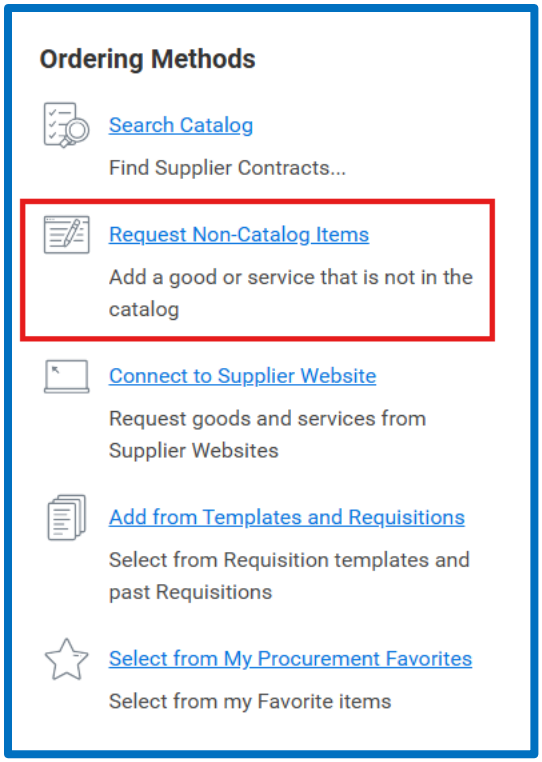
Requisition Details

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.
7. To select a **Requisition Type,** select the menu icon, and then select **Solicitation.**
   (**Note:** *Alternatively, type in a Requisition Type, select* enter *to search, and then select from the search results.)*
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 Printed Purchase Order.)*
9. Select **Save Changes.**
   (**Note:** *Required fields are indicated by a red asterisk.)*



Ordering Methods

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

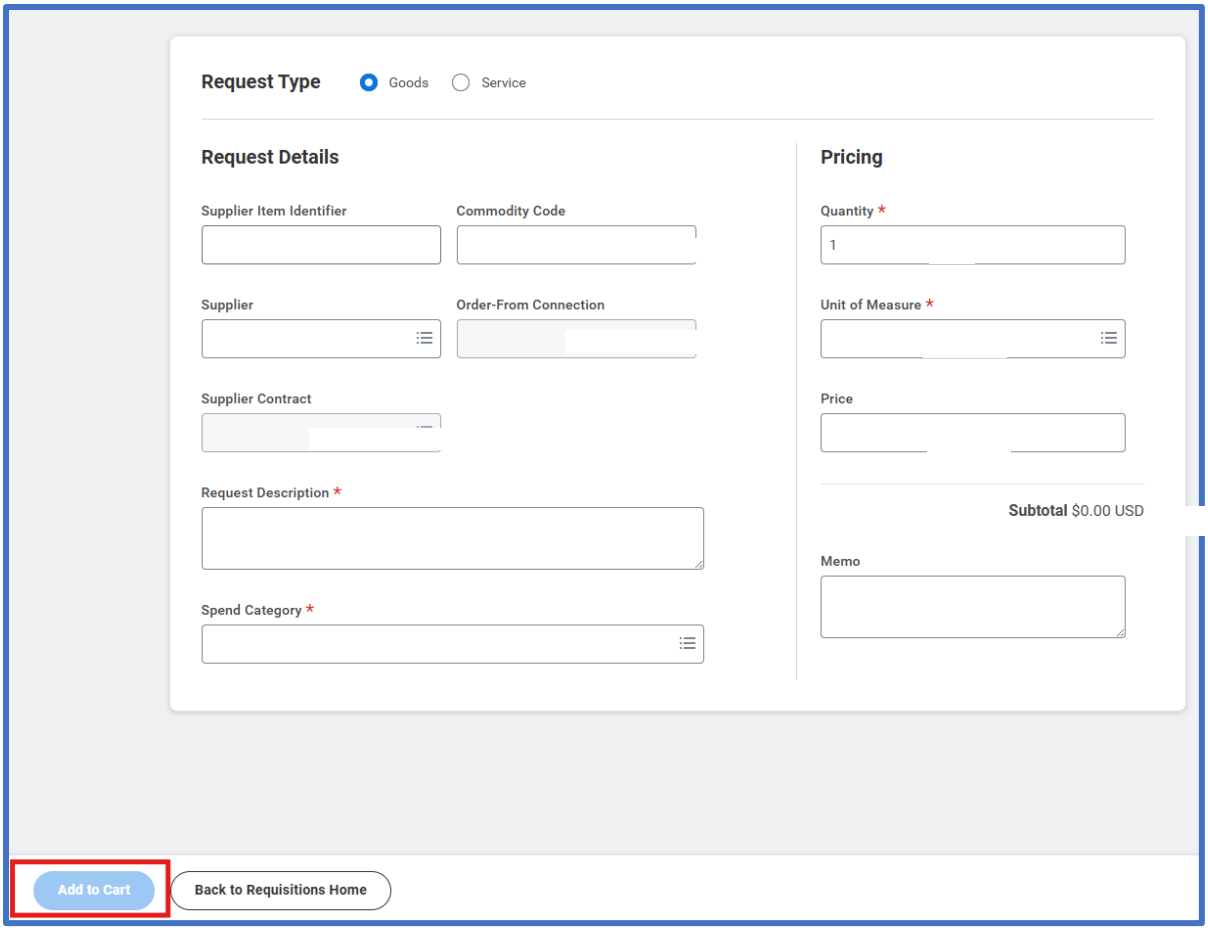


Request Type

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

Request Details

1. Under the heading **Request Details,** 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.)*
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 the **Order-From Connection**, select the menu icon, and then make your selection.
   (**Note:** *For suppliers that also function as punch-out suppliers (e.g., WB Mason, Dell, Grainger), the **Order-From Connection** must be updated to an option containing **Print**.)*
4. To specify **what you need,** type in a **Request Description.**
5. Type in a **Quantity.**
6. Type in a **Unit of Measure.**
7. Type in a **Price.**
   (**Note:** *Please enter numbers only, no dollar signs.)*
8. Select **Add to Cart.**



9. 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.)*

10. 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 **Currency.**
2. Review, and if necessary, edit **Requisition Type,** and then scroll down.

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

Goods

3. 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.)*

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.

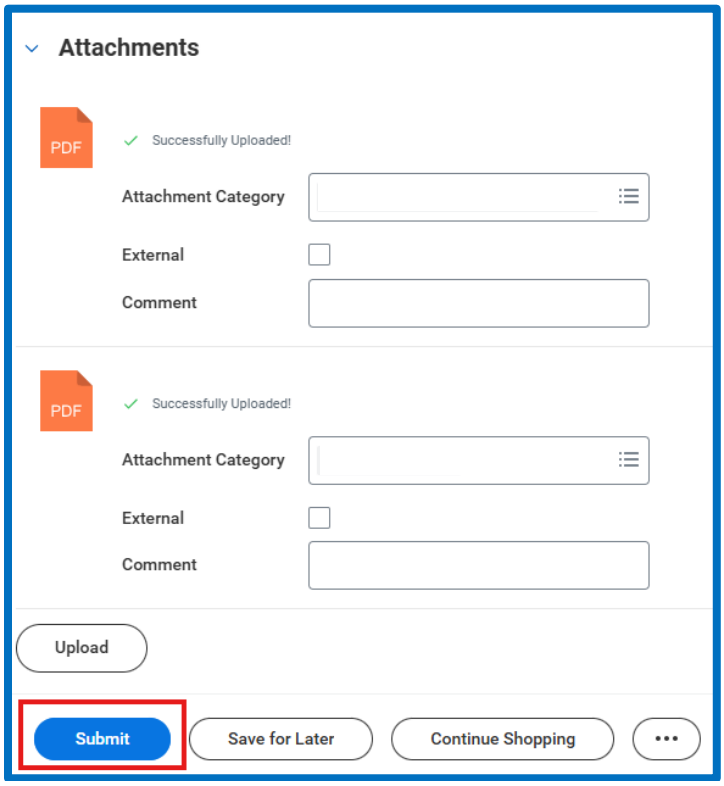
   (**Note:** *Alternatively, type in the name or number of a* ***Cost Center*** *and then select* enter *to search.)*

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 attach supporting documentation, such as the appropriate Solicitation template to proceed.)*
2. Select **Submit.**



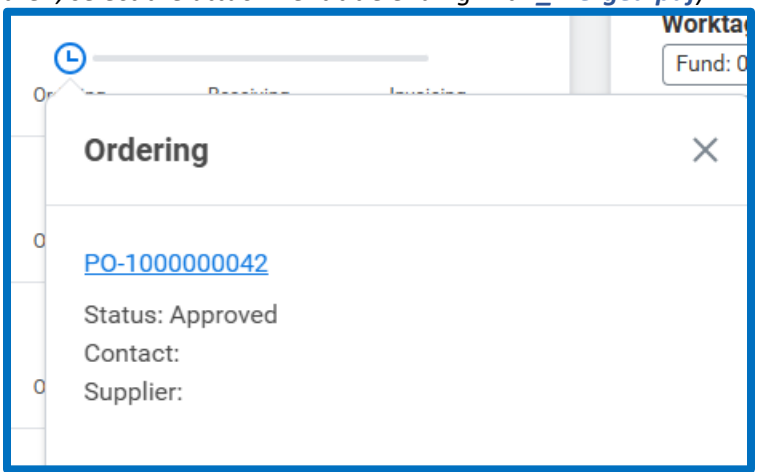
Approval Process

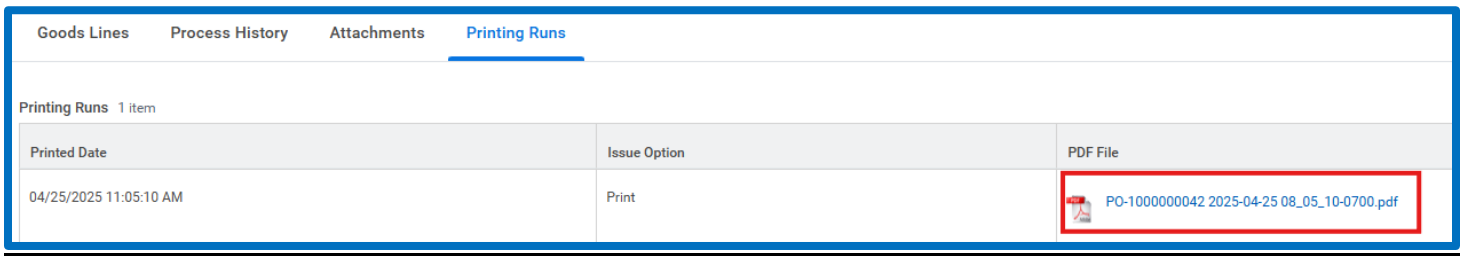
Once submitted, your requisition follows an approval workflow and route to the Division of Purchases for Purchase Order creation.

1. Once the award is ready for issuance, the Buyer will return your requisition for revision, allowing you to update the Extended Amount, Unit Cost and Supplier to align with the award details in OSP.
2. Navigate to the Goods/Services line and update the required field(s). Once completed, select **'Submit'** to proceed.

Final Steps

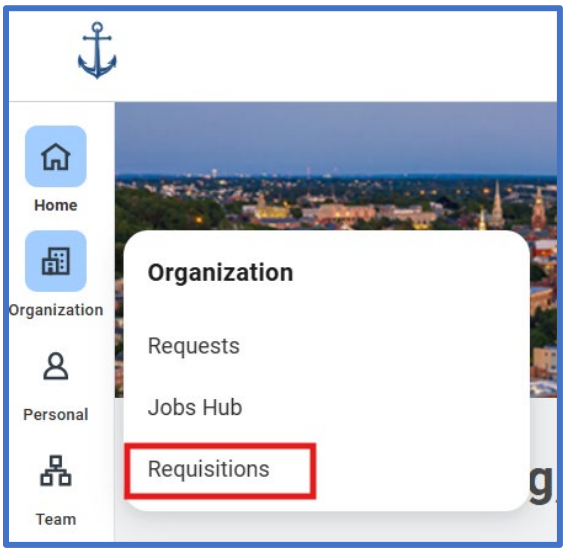
- *The requisition will proceed through the designated approval process to confirm the awarded solicitation amount. Once fully approved, the requisition will be redirected to the assigned Buyer to proceed with issuing the award.*
- To view the **Purchase Order Number,** return to the **Requisitions** 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**)*





Process for Submitting a Requisition to Contract

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.****)*



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7. Select **Save Changes.**
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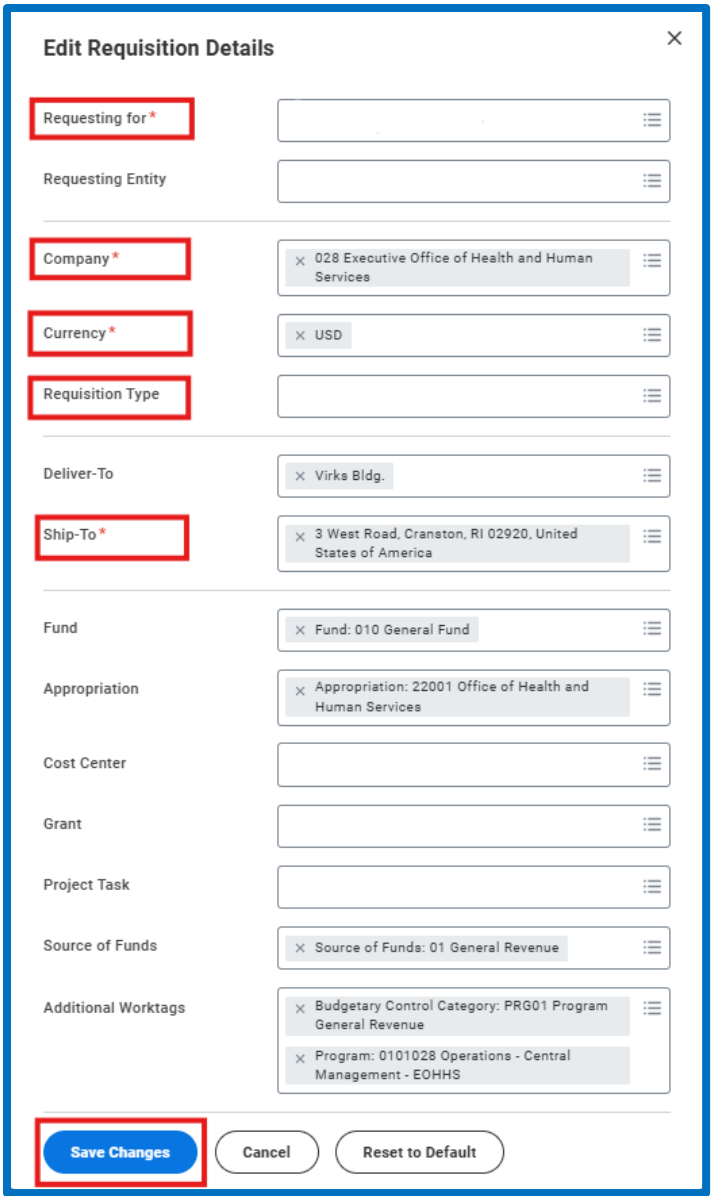

Ordering Methods

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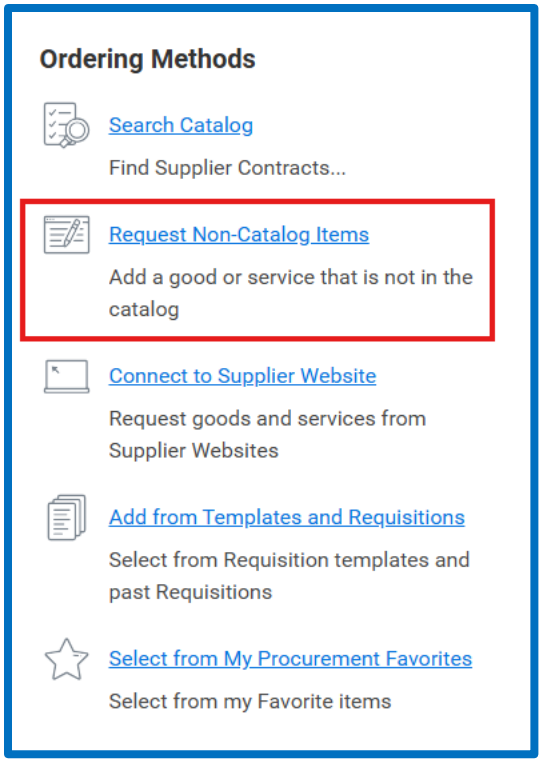

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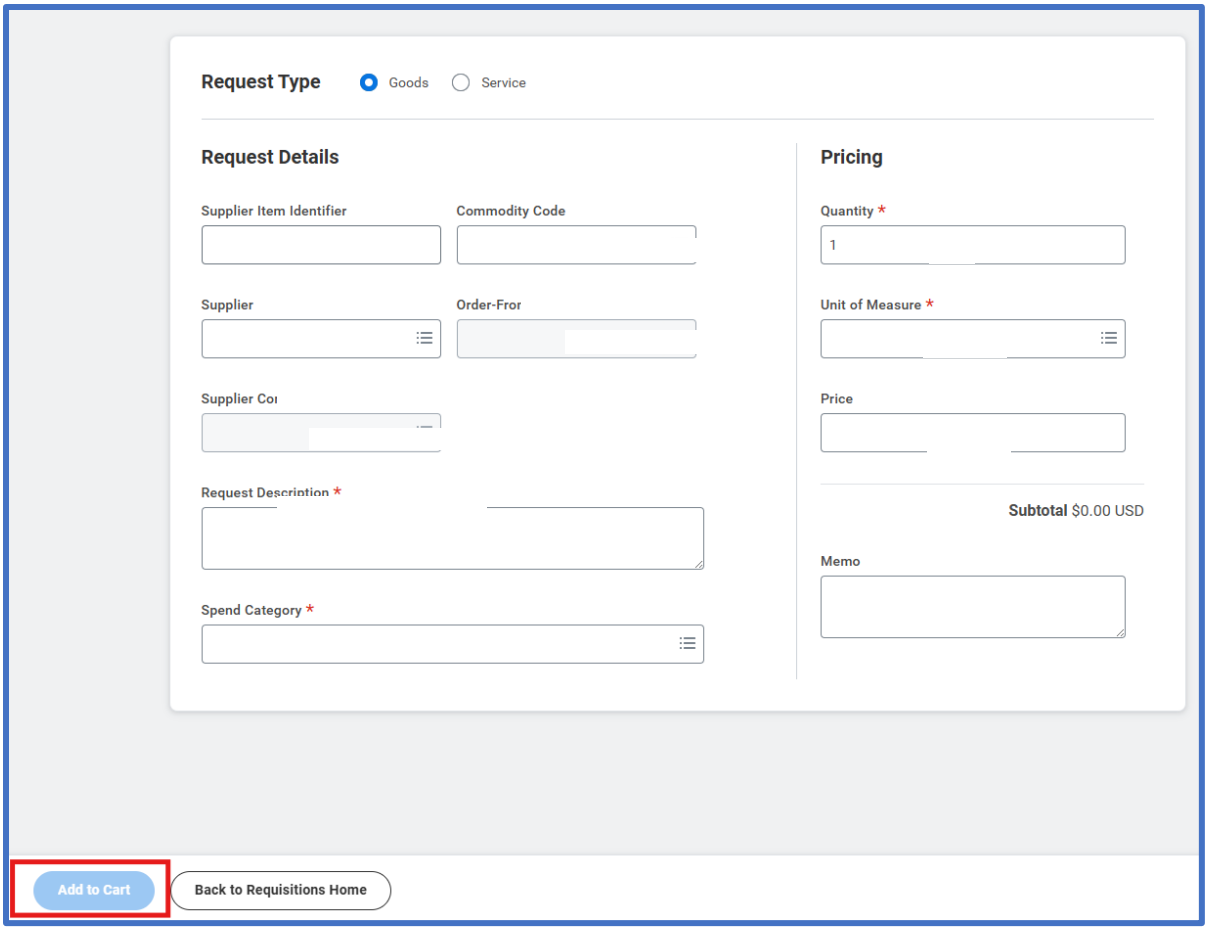
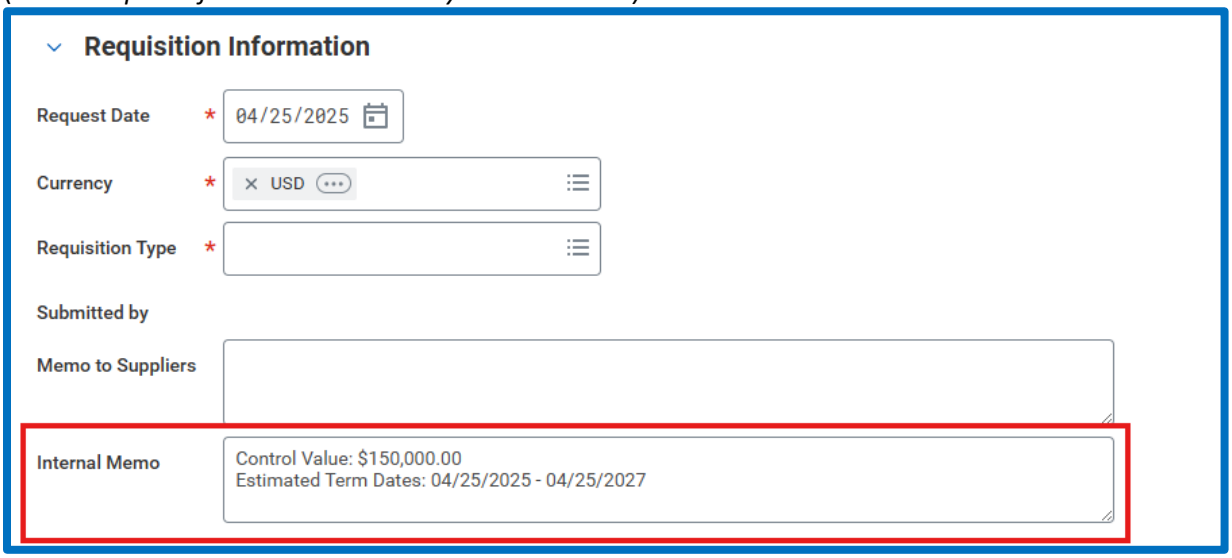


9. Review the contents of the cart, and once ready, select **Checkout.**
   (Note: *An error message may generate to remind you that an attachment is required.)*

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 the **Estimated Control Value** and **Estimated Term Dates** in the header internal memo**,** and then scroll down.
   (**Note:** *Required fields are indicated by a red asterisk.)*



Goods

1. 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.)*
2. Use the horizontal scroll bar to navigate to the **Memo** field.
3. Type in **Control Value** per appropriation/program in the line **Memo** field.
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.
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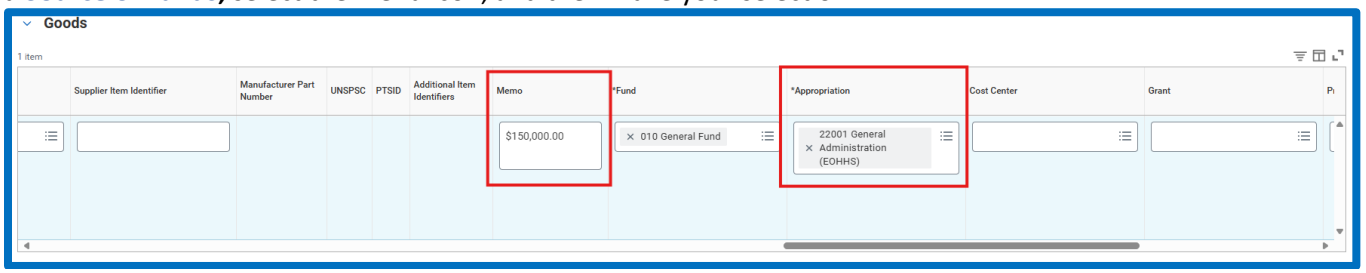

Attachments

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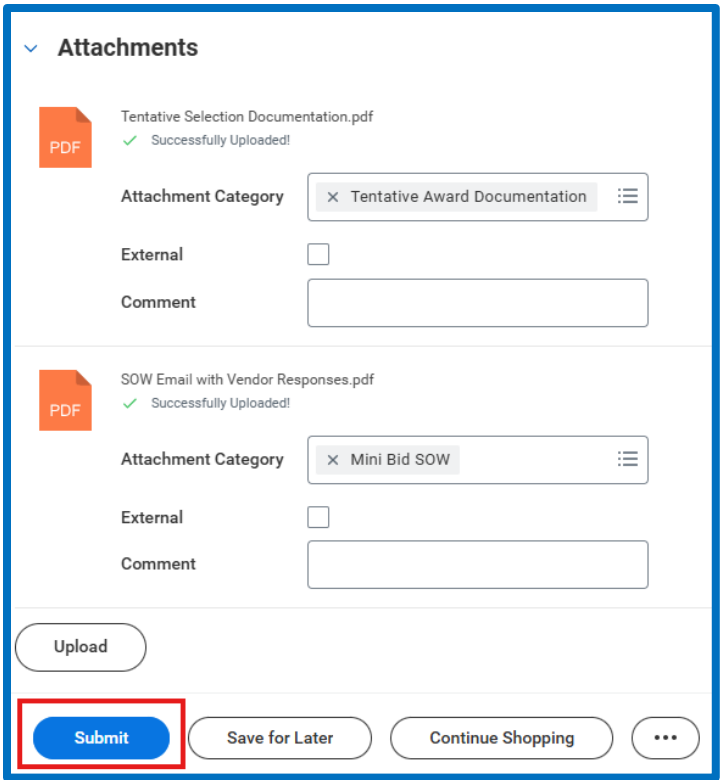
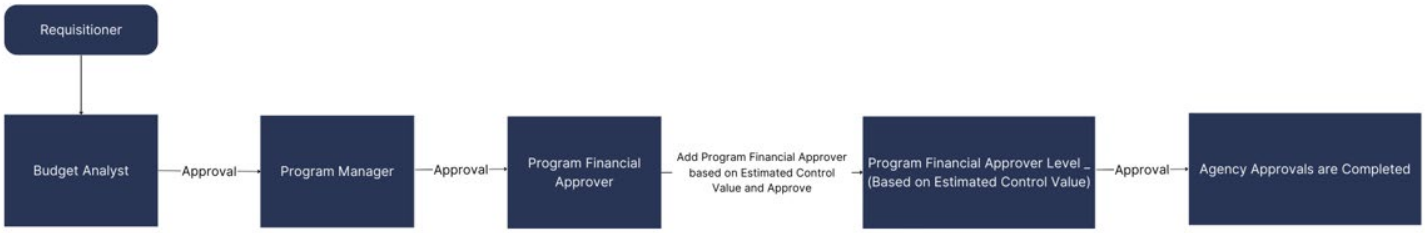
   f. To select an **Attachment Category**, select the menu icon, and then make your selection.
   g. To include the attachment on the resulting Purchase Order for the Supplier to view, type **External** in the comment field.

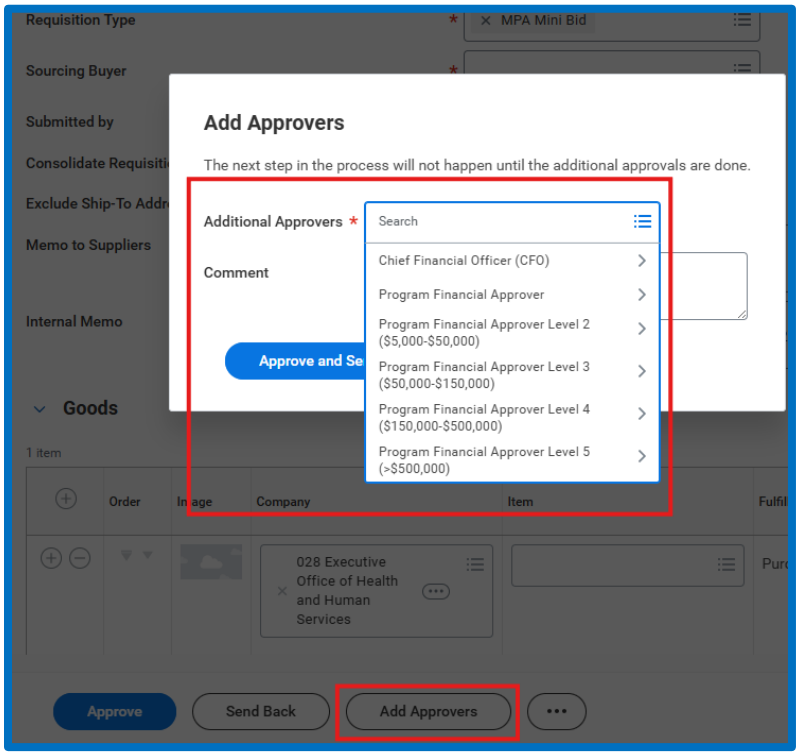
   (**Note**: *To attach more documents, select **Upload**. To remove an attachment, select the trash can icon.)*
   (**Note:** *You must attach supporting documentation, such as the appropriate Solicitation template to proceed.)*
9. Select **Submit**.



Approval Process

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



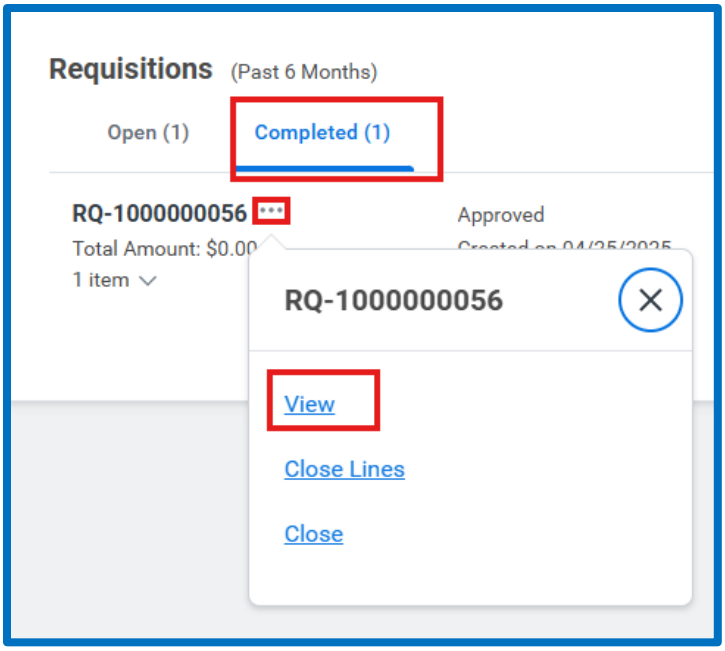


1. Once the award is ready for issuance, the Buyer will return your requisition for revision, allowing you to update the Extended Amount, Unit Cost and Supplier to align with the award details in OSP.
2. Navigate to the Goods/Services line and update the required field(s). Once completed, select **'Submit'** to proceed.

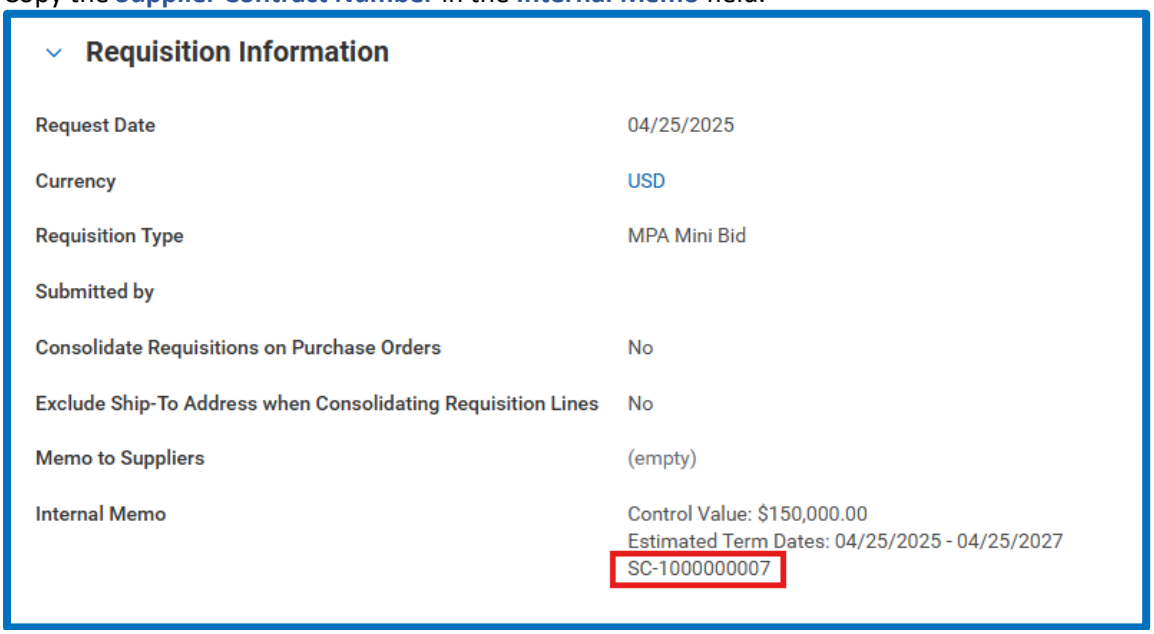
Final Steps

The requisition will proceed through the designated approval process to confirm the awarded solicitation amount. Once fully approved, the requisition will be redirected to the assigned Buyer to proceed with issuing the award.

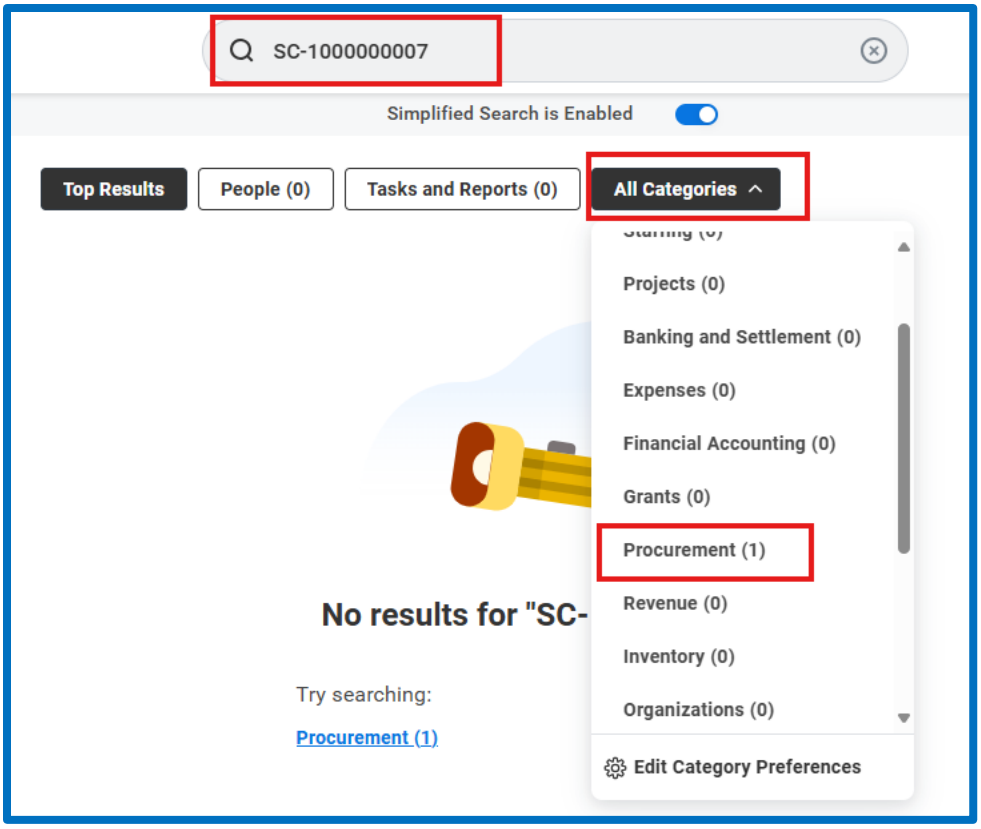
1. To view the **Supplier Contract,** return to the **Requisitions** page and select the Completed tab.
2. Select the **Action Button** next to the Requisition number**.**
3. Select **View.**



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



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

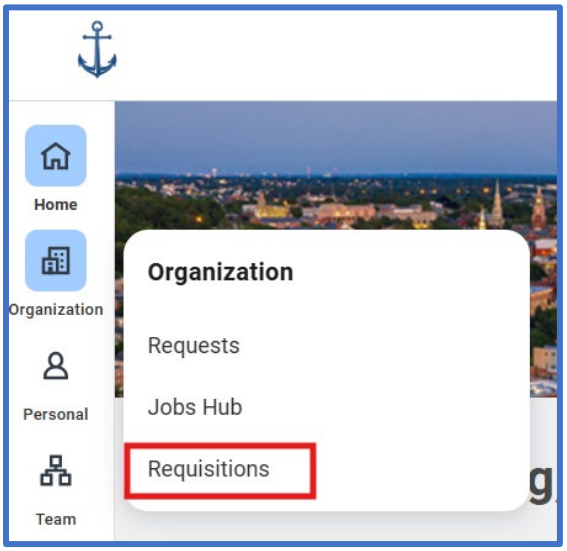


7. Select the **Supplier Contract Number** to view **Supplier Contract.**

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.*)

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.**
4. In the ERP system, hover over Organization on the left panel toolbar.
5. 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.**)*



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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 **Solicitation.**
   (**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.**
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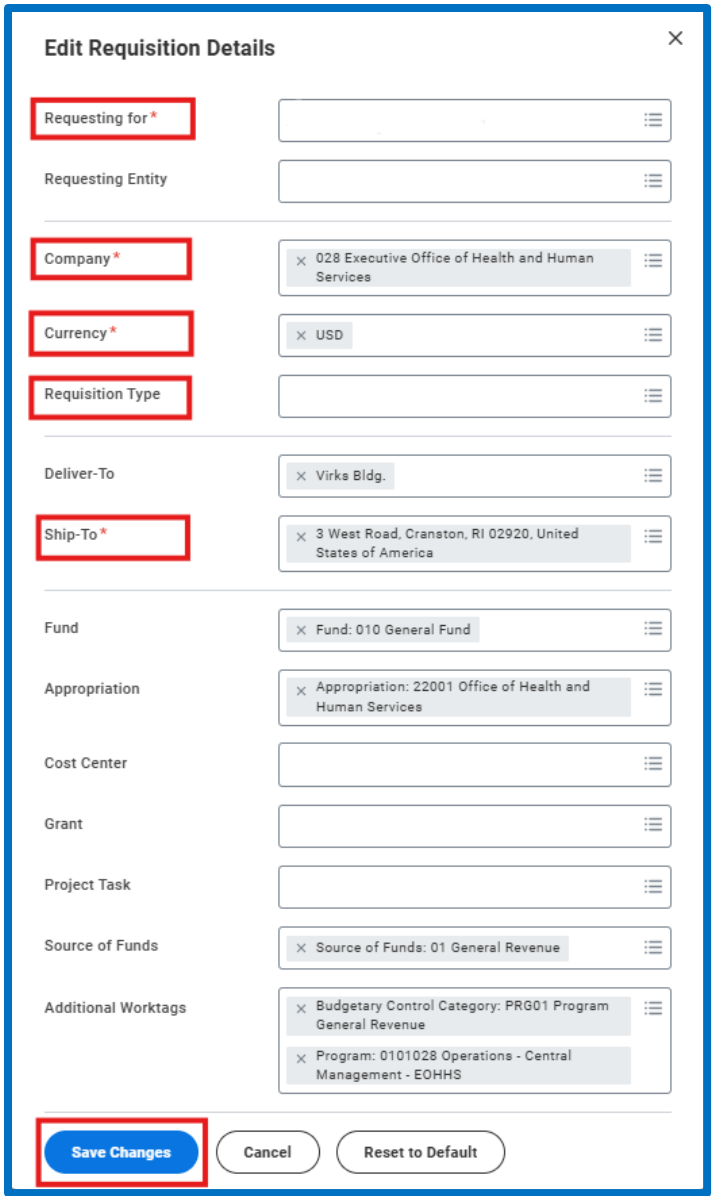

Ordering Methods

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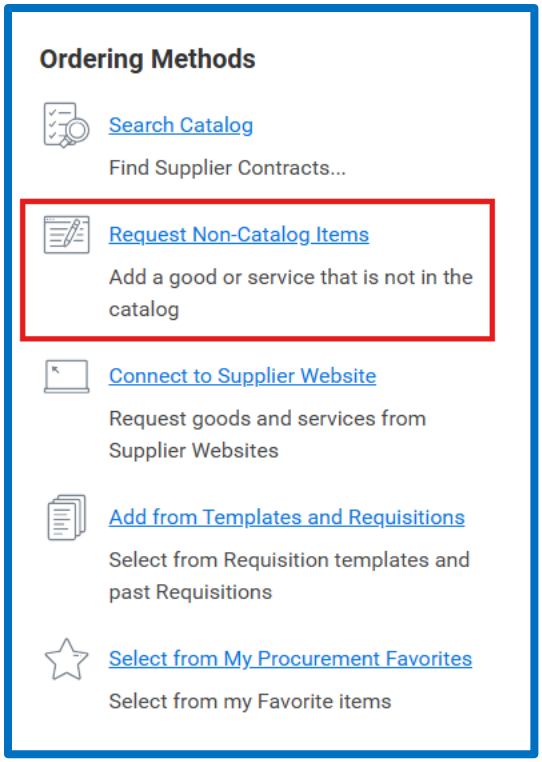

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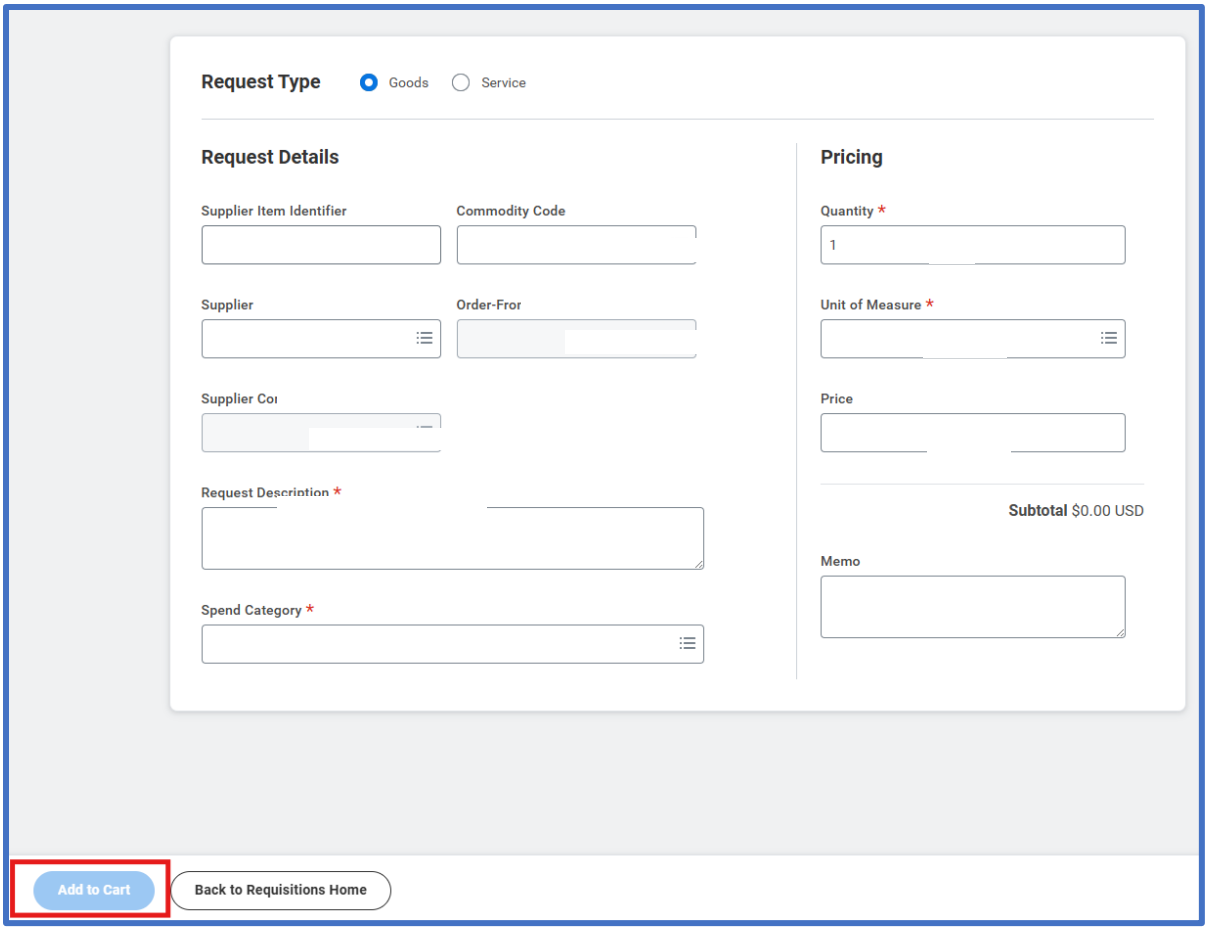
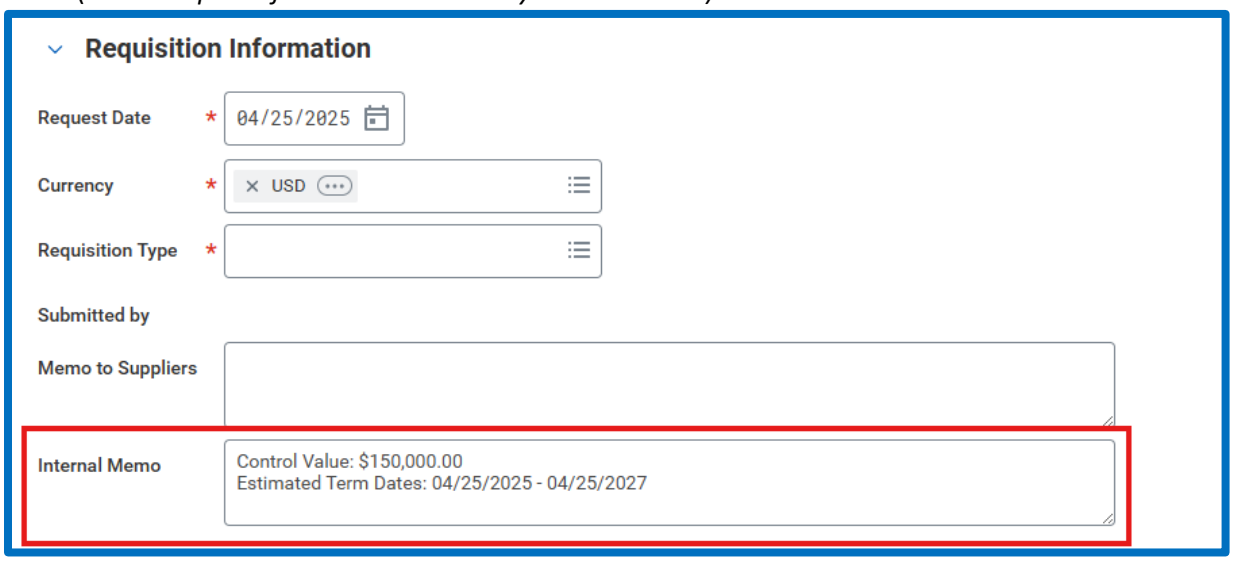
6. Type in a **Unit of Measure.**
7. Type in a **Price** as $0.00.
   (**Note:** *Please enter numbers only, no dollar signs.)*
8. Select **Add to Cart.**



9. 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.)*

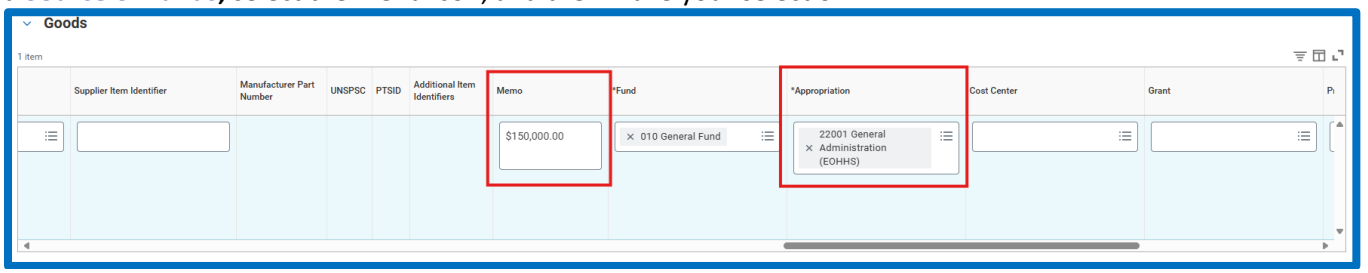
Requisition Information

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 the **Estimated Control Value** and **Estimated Term Dates** in the header internal memo**,** and then scroll down.
   (**Note:** *Required fields are indicated by a red asterisk.)*



Goods

1. 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.)*
2. Use the horizontal scroll bar to navigate to the **Memo** field.
3. Type in **Control Value** per appropriation/program in the line **Memo** field.
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.

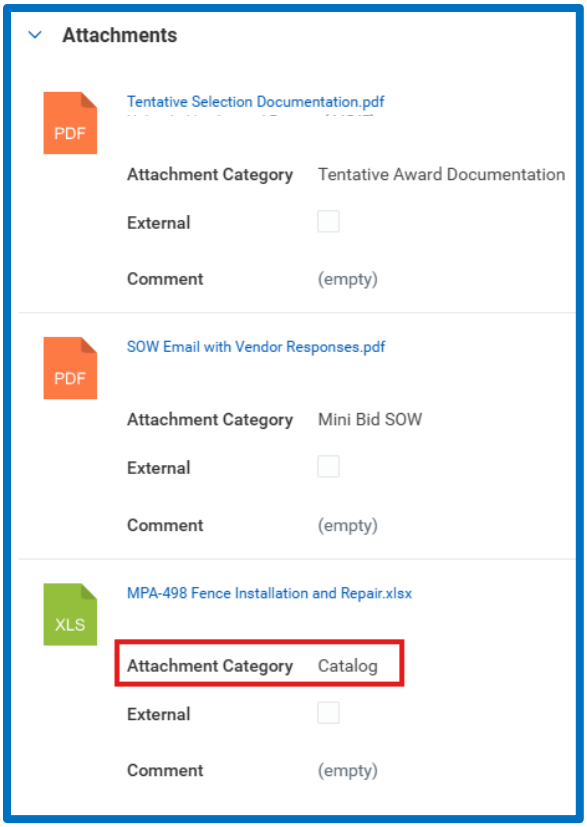


Attachments

(Note: *You **must** upload your completed Submit Catalog Load Excel Template with the **Attachment Category** of **Catalog** for this to become a Contract Catalog.)*

8. 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.

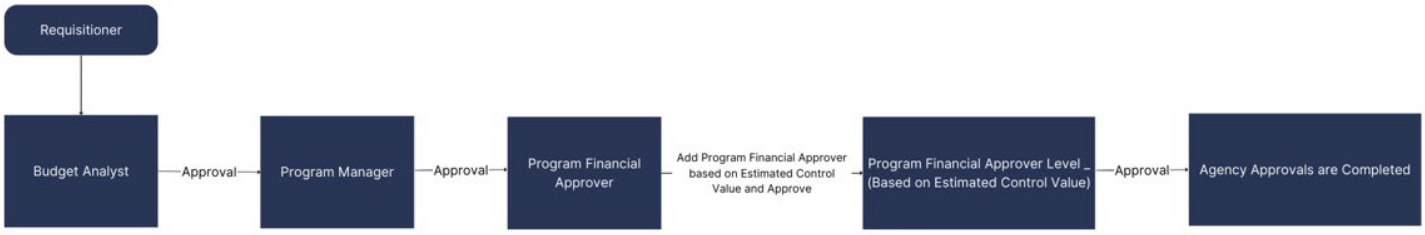
(**Note**: *To attach more documents, select **Upload**. To remove an attachment, select the trash can icon.)*
(**Note:** *You must attach supporting documentation, such as the appropriate Solicitation template to proceed.)*

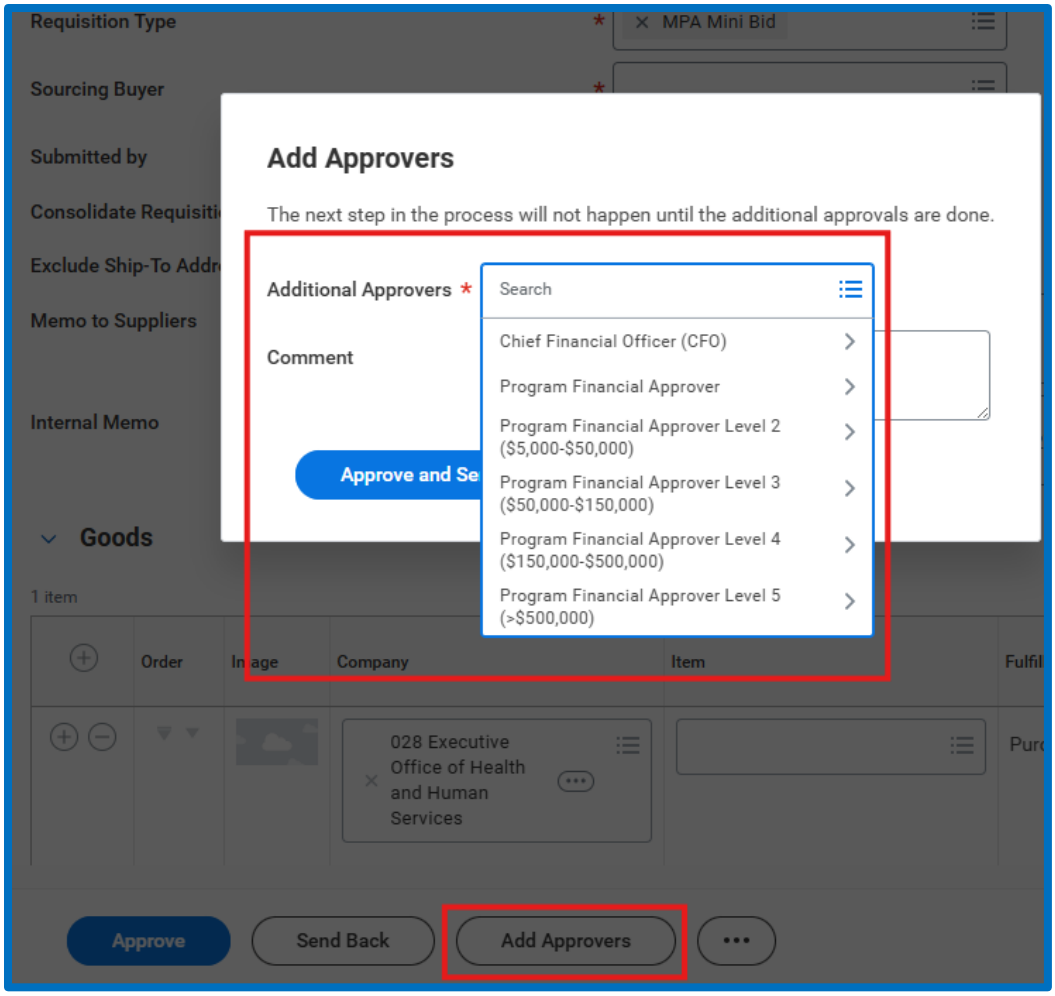


9. Select **Submit**.

Approval Process

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



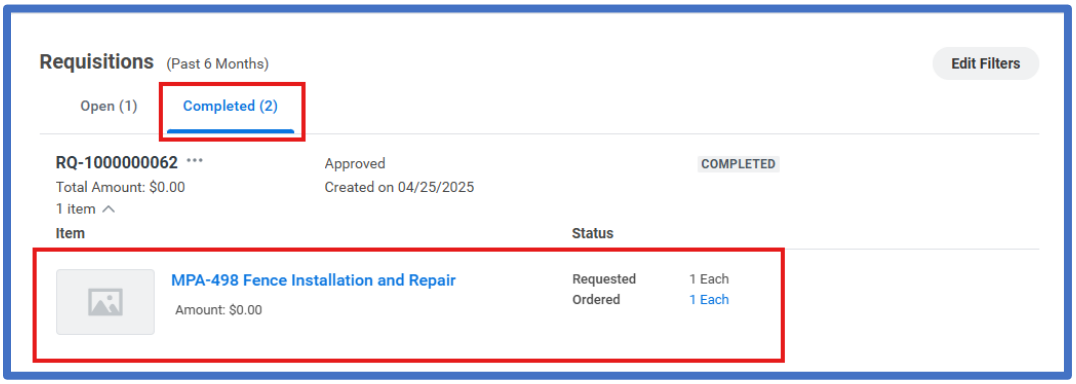


10. Once the award is ready for issuance, the Buyer will return your requisition for revision, allowing you to update the Extended Amount, Unit Cost and Supplier to align with the award details in OSP.
11. Navigate to the Goods/Services line and update the required field(s). Once completed, select **'Submit'** to proceed.

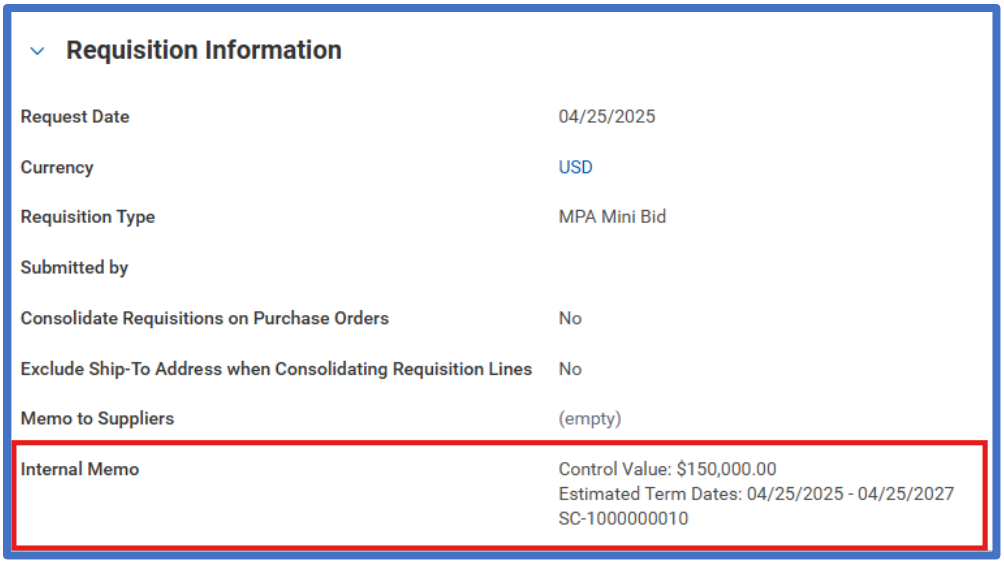
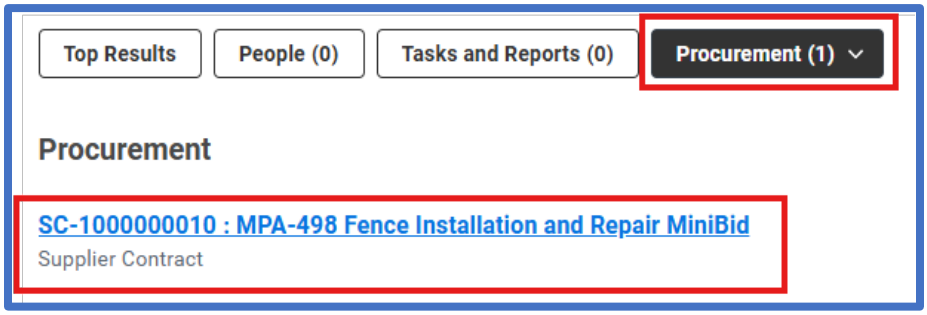
Final Steps

The requisition will proceed through the designated approval process to confirm the awarded solicitation amount. Once fully approved, the requisition will be redirected to the assigned Buyer to proceed with issuing the award.

12. To view the **Supplier Contract,** return to the **Requisitions** page and select the Completed tab.
13. Select the **Action Button** next to the Requisition number**.**
14. Select **View.**



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



16. Using the Workday Search Bar, paste the **Supplier Contract Number** and select Enter.
17. Under the **All Categories** drop-down menu, select **Procurement.**
18. Select the **Supplier Contract Number** to view **Supplier Contract.**