ICONS REFERENCED IN THIS JOB AID

Required ✱   Prompt ☰   Related Actions (Actions) ⬛⬛⬛   Add Row ⊕ ⊕
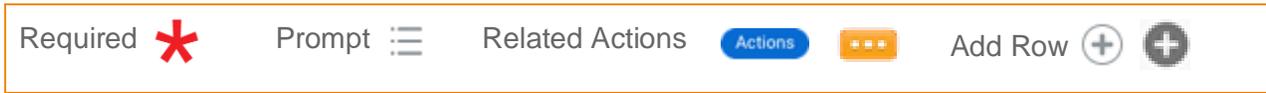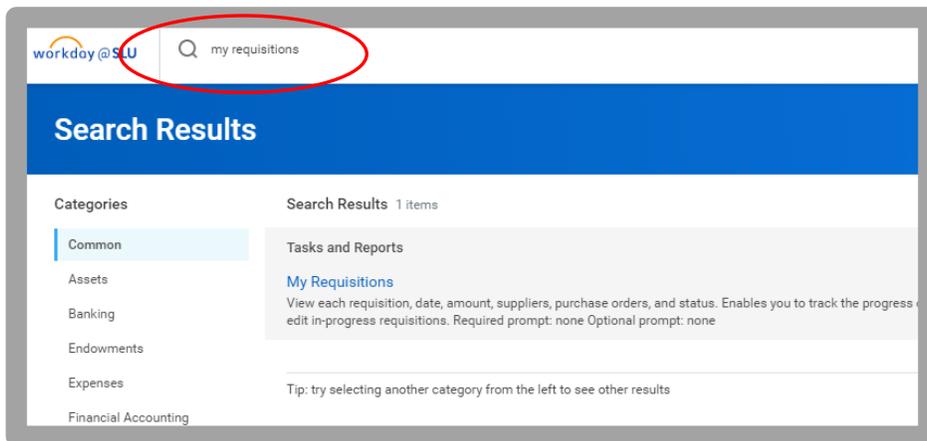
RELATED ACTIONS FOR PROCUREMENT TRANSACTIONS

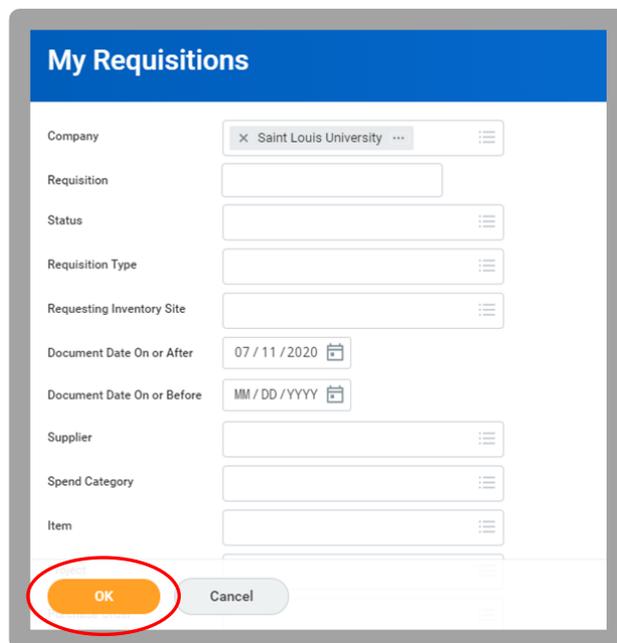This job aid explains how to find and complete important related actions for procurement transactions.

Steps:

Locate the Requisition

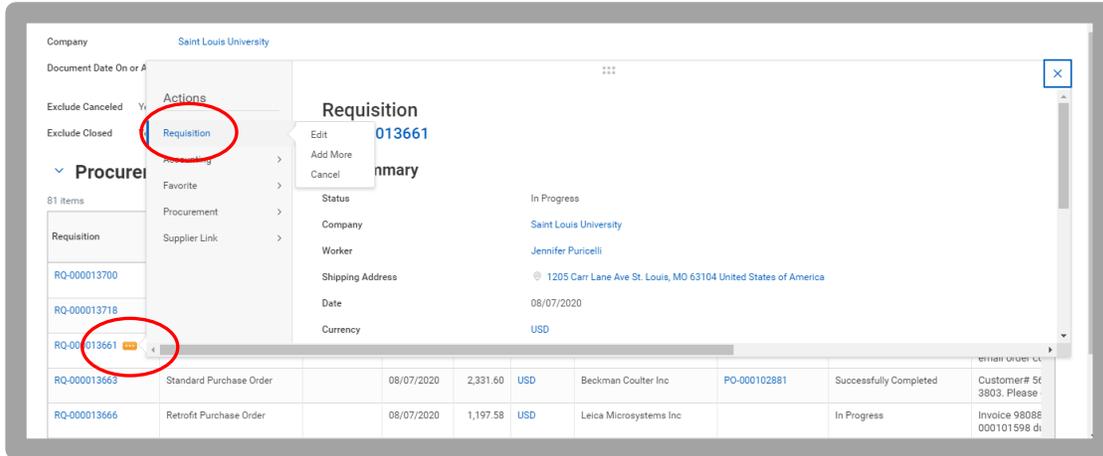**1.** Enter **My Requisitions** into the search bar.

2. Add any applicable filters to narrow search results – e.g. supplier, status, date range and click **OK**.

Related Actions

The **actions button** can be found next to the requisition number (icon with three dots).

1. Click on the **actions button** 🔶 and then **Requisition**.

Requisition Actions Definitions

- **Edit**: This option is available when a purchase requisition is routing for approval ("In Progress" status) or a in draft status. If a user clicks edit, it will bring the purchase requisition back to them for editing. They can make edits and then it will re-route for approval after submitting.

- **Add More**: This option is available when a purchase requisition is routing for approval. If a user clicks "Add More" it will bring the purchase requisition back to them to add additional line items to it. The requisition will then re-route for approval after submitting.

- **Cancel**: This option will cancel the purchase requisition and the approval process.

2. To **copy** a requisition, select the **actions button** 🔶 and then the **Procurement** option and then **Add to Cart**.
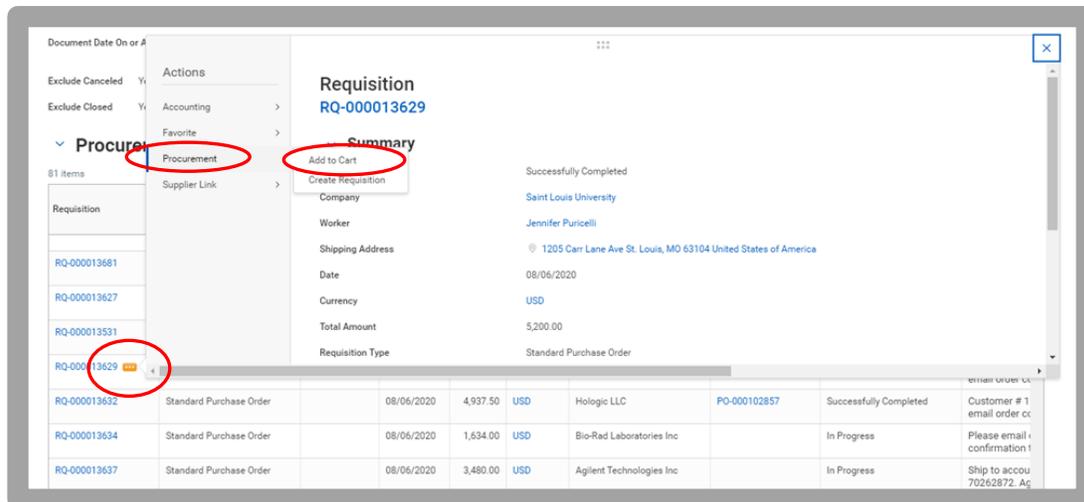
View a Requisition

1. To view a requisition prior to taking action on it, click on the **requisition number**.

2. The **related actions** button   [Actions]   is then accessible next to the requisition number at the top of the screen.

Related Actions for a Purchase Order

1. Enter **Find Purchase Orders** into the search bar.

2. Add any applicable filters to narrow search results – e.g. supplier, buyer, status, date range and click **OK**.
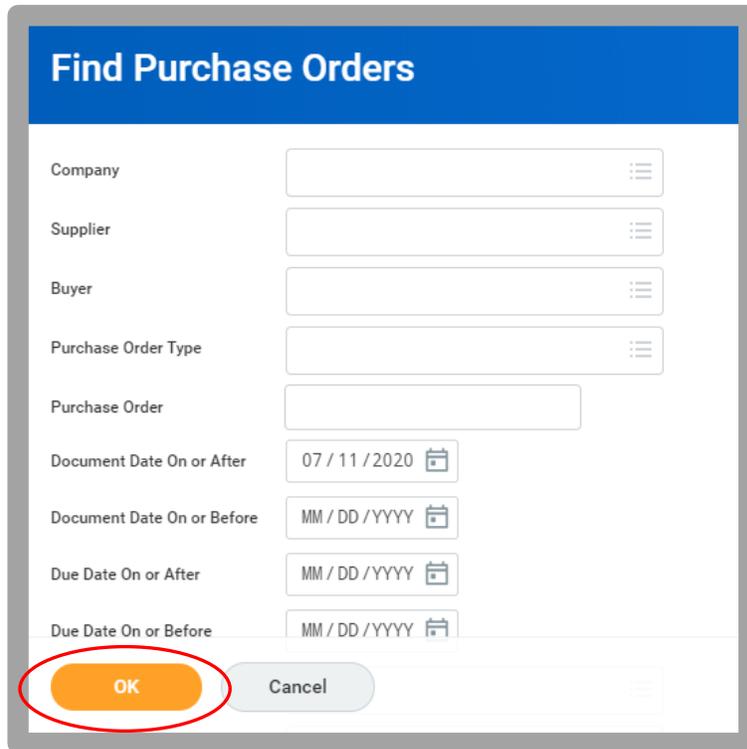
3. The **actions button** ⋯ can be found next to the purchase order number (icon with three dots). Click on the actions button and then **Purchase Order**.

Requisition Actions Definitions

- **Create Change Order**: This option is available when a purchase requisition has transactions posted against it (such as an invoice or receipt). If a user clicks "Create 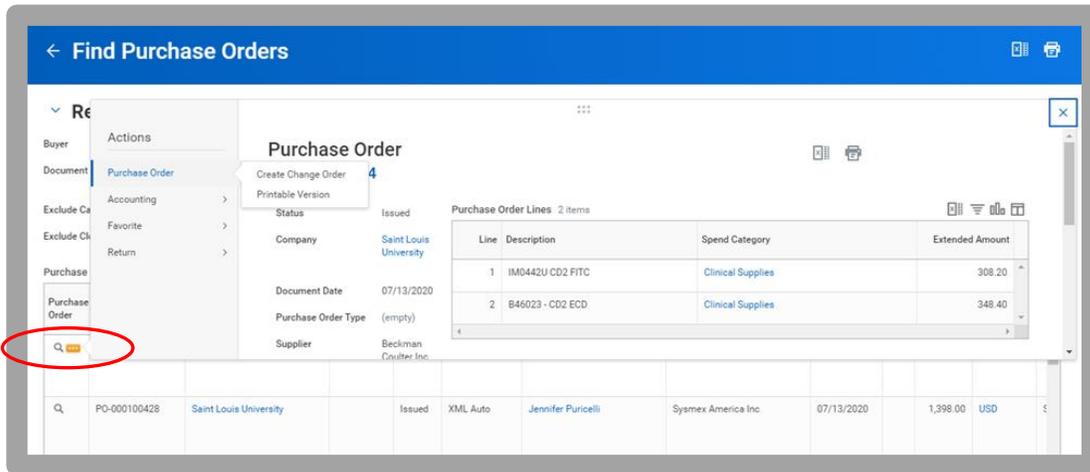Change Order", it will initiate the change order task where they can edit the purchase order and a new purchase order version will be issued. Change orders route through the standard requisition business process. The change order is not sent to the supplier and resides within Workday only (change orders will not be reflected in Billiken Buy).

- **Printable Version**: Selecting this option will allow the user to generate and download a printable version of the purchase order in a PDF format. This option might be helpful for retrofit purchase orders when suppliers need a copy of the purchase order.

- **Receipt**: A receipt can be initiated on a purchase order by selecting the **Receipt** option for a related action.
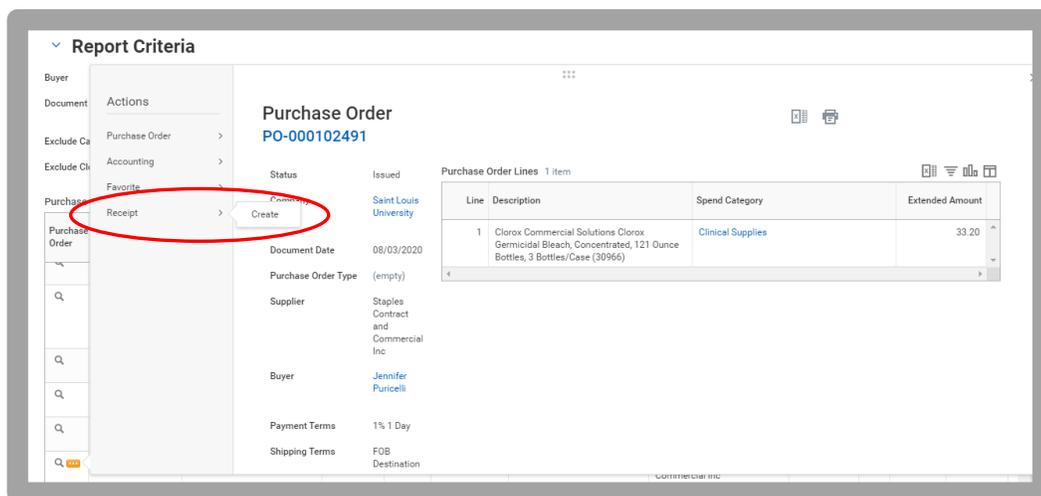
- **Return:** A return can be initiated on a purchase order by selecting the "Return" option for a related action. Returns can only be created after a receipt is created against the purchase order. Creating a return in Workday should only be selected after the return is authorized directly with the supplier (to coordinate pick-up of the item and a credit).
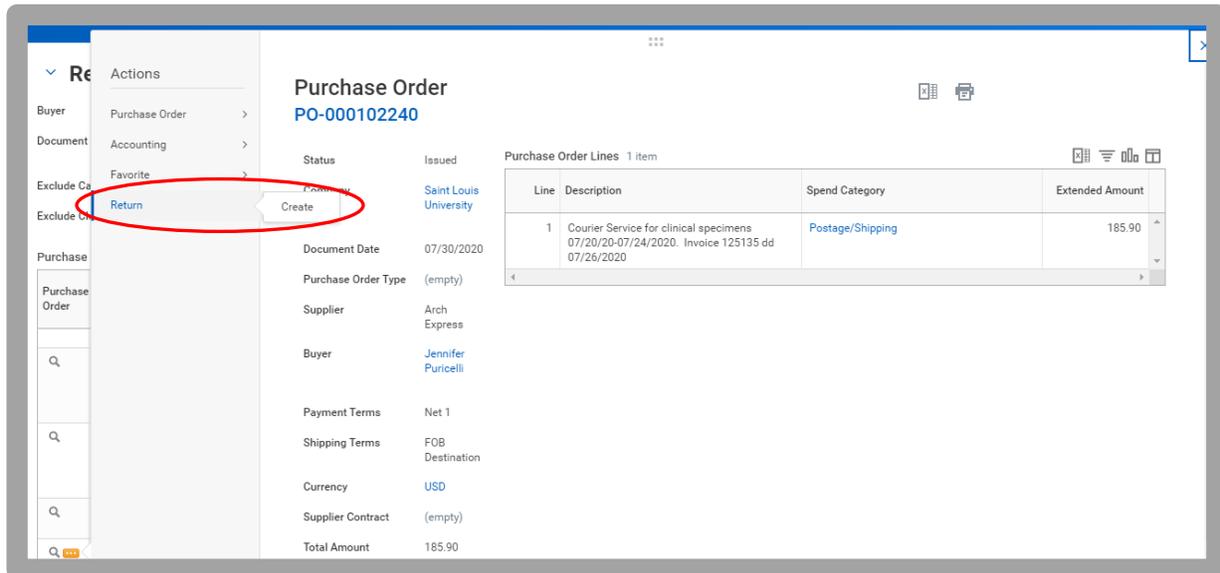

* If you wish to copy your purchase order, please reference the instructions above for copying the purchase requisition. Purchase orders cannot be copied in Workday.

** The Cancel PO task is limited to the Procurement Admin. If you need to cancel your purchase order, please email the PO number to billikenbuyadmin@slu.edu.

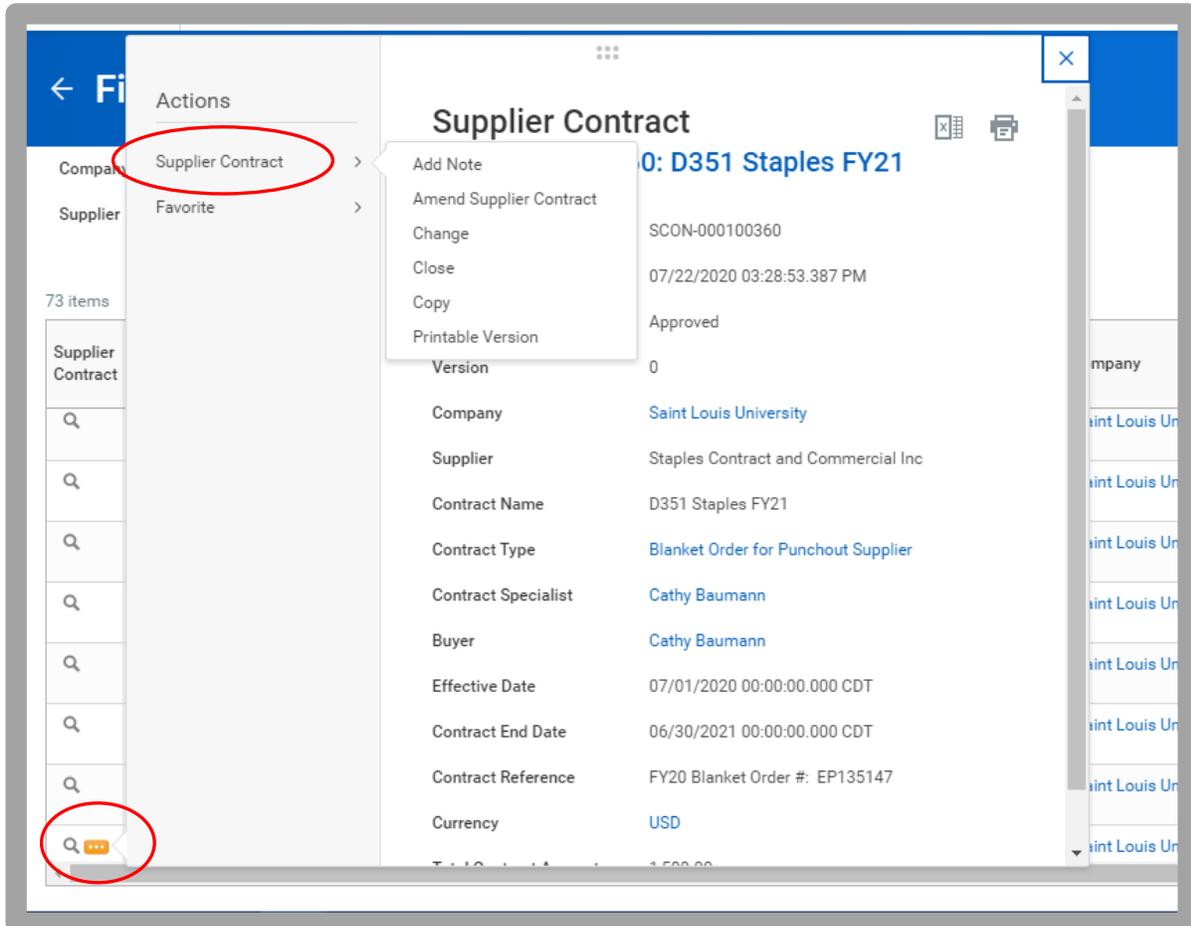Related Actions for a Supplier Contract

1. Enter **Find Supplier Contracts** into the search bar.
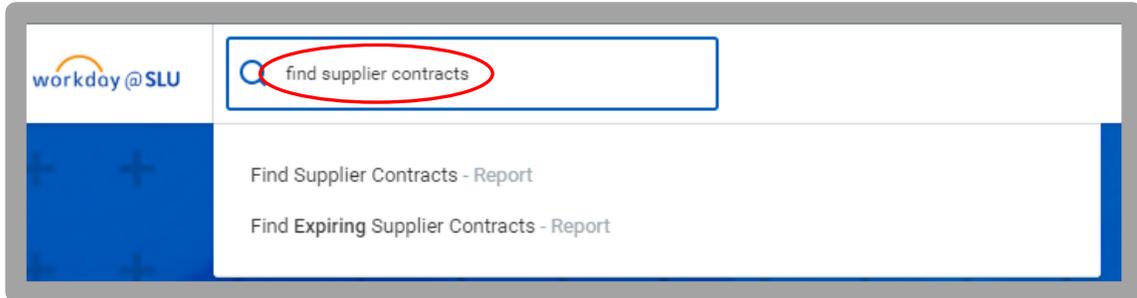
2. Add any applicable filters to narrow search results – e.g. company, supplier, status, date range, created by worker, etc., and click **OK**.

workday @ SLU
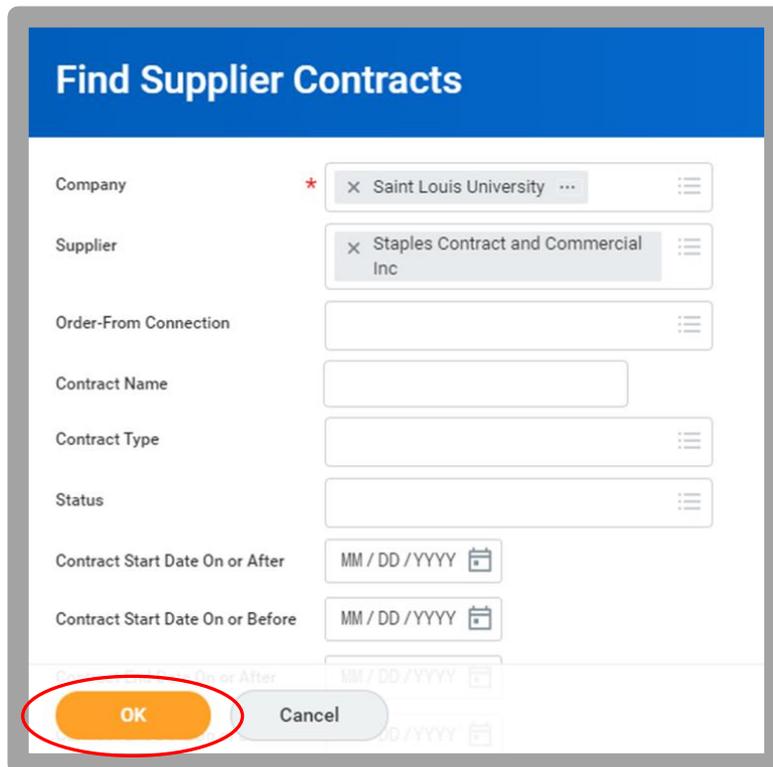
3. The **actions button** ••• can be found next to the supplier Contract number (icon with three dots). Click on the actions button and then **Supplier Contract**.

Supplier Contract Actions Definitions

- **Amend Supplier Contract**: This option should be selected if a supplier contract requires changes (such as an increase to the supplier contract balance) and transactions have already posted against the supplier contract (such as a purchase order). If a user clicks "amend supplier contract", the contract amendment screen will be brought up where changes can be made. The contract amendment will then route for approval and a new version number will be generated upon approval.

- **Change**: This option is available if a supplier contract does not have any transactions posted against it or if the contract requires changes and is still routing for approval. If a user clicks "change", it will bring the supplier contract back to them for editing. They can make edits and then it will re-route for approval after submitting.

- **Close**: This option should be selected if the buyer no longer wants to use the supplier contract to source purchase requisitions against.

- **Copy**: This option should be selected if the user wishes to copy the supplier contract. It will allow the user to update various fields before submitting the contract for approval.