

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.

vorkday@ \$.U Q my requ	uisitions
Search Results	
Categories	Search Results 1 items
Common	Tasks and Reports
Assets	My Requisitions
Banking	View each requisition, date, amount, suppliers, purchase orders, and status. Enables you to track the progress edit in-progress requisitions. Required prompt: none Optional prompt: none
Endowments	
Expenses	Tip: try selecting another category from the left to see other results
Financial Accounting	

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

Company	× Saint Louis University …	
Requisition		
Status		
Requisition Type		
Requesting Inventory Site		
Document Date On or After	07/11/2020 💼	
Document Date On or Before	MM / DD / YYYY	
Supplier		
Spend Category	:=	
ltem		



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.

Document Date On or A									
Exclude Canceled Y	Actions	Requis	sition						
Exclude Closed	Requisition	Edit	013661						
· Procurei	Favorite	Add More Cancel	nmary						
81 items	Presurement	Status			In Progr	ess			
Description	Procurement >	Company			Saint Lo	ouis University			
Requisition	Supplier Link >	Worker			Jennife	r Puricelli			
RQ-000013700		Shipping Add	iress		⊚ 120	5 Carr Lane Ave St. Louis, MO 631	04 United States of Americ	a	
RO-000013718		Date			08/07/2	2020			
		Currency			USD				
RQ-00 013661					1				eman order oc
RQ-000013663	Standard Purchase Order		08/07/2020	2,331.60	USD	Beckman Coulter Inc	PO-000102881	Successfully Completed	Customer# 56 3803. Please
RQ-000013666	Retrofit Purchase Order		08/07/2020	1,197.58	USD	Leica Microsystems Inc		In Progress	Invoice 98088

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.

Ocument Date On or A										>	
xclude Canceled Ye	Actions		Requis	ition							
xclude Closed Ye	Accounting	>	RQ-0000	13629							
· Procure	Favorite	>	Sum	mary							
1 items	Contraction		Add to Cart Create Requisitio			Success	fully Completed				
Desulation	Supplier Link	,	Company			Saint Lo	ais University				
Requisition			Worker			Jennifer	Puricelli				
			Shipping Add	ess		0 1205	Carr Lane Ave St. Louis, MO 63	104 United States of Americ	a		
RQ-000013681			Date			08/06/20	08/06/2020				
RQ-000013627			Currency			USD					
R0-000013531			Total Amount			5,200.00					
\frown			Requisition Ty	pe		Standard	Purchase Order				
RQ-000 13629	9									email order cc	
RQ-000013632	Standard Purchase	Order		08/06/2020	4,937.50	USD	Hologic LLC	PO-000102857	Successfully Completed	Customer # 1 email order cc	
RQ-000013634	Standard Purchase	Order		08/06/2020	1,634.00	USD	Bio-Rad Laboratories Inc		In Progress	Please email confirmation 1	
R0-000013637	Standard Purchase	Order		08/06/2020	3.480.00	USD	Agilent Technologies Inc		In Progress	Ship to accou	



View a Requisition

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

items									
Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders	Request Status	Memo to Suppl
RQ-000013700	Retrofit Purchase Order		08/07/2020	485.00	USD	Life Technologies Corporation	PO-000102900	Successfully Completed	Invoice 78020 07/21/20
RQ-000013718	Retrofit Purchase Order		08/07/2020	366.00	USD	Life Technologies Corporation		In Progress	Invoice # 786 07/30/20
RQ-000013661	Standard Purchase Order		08/07/2020	330.00	USD	MarketLab Inc		In Progress	Customer # 2 email order co
RQ-000013663	Standard Purchase Order		08/07/2020	2,331.60	USD	Beckman Coulter Inc	PO-000102881	Successfully Completed	Customer# 56 3803. Please
RQ-000013666	Retrofit Purchase Order		08/07/2020	1,197.58	USD	Leica Microsystems Inc		In Progress	Invoice 98088 000101598 di
RQ-000013681	Standard Purchase Order		08/07/2020	79.19	USD	Airgas USA LLC		In Progress	Customer # 0 Kornbluth. Pl
RQ-000013627	Standard Purchase Order		08/06/2020	2,703.00	USD	Hologic LLC	PO-000102853	Successfully Completed	Customer# 15 email order co
RQ-000013531	Retrofit Purchase Order		08/06/2020	35.50	USD	Continental Carbonic Prod Inc		In Progress	Invoice 42601

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

View Requis	ition		
Budget Check Status N	Actions	Requisition RQ-000013629	
✓ Shipping I	Favorite Procurement Supplier Link	Add to Cart Create Requisition	Successfully Completed
Deliver-To (empty Ship-To Address © 12		Company Worker Shipping Address	Saint Louis University Jennifer Puricelli © 1205 Carr Lane Ave St. Louis MO 63104 United States of America
Requisitio Request Date		Date Currency	08/06/2020 USD
Currency Requisition Type		Total Amount Requisition Type	5,200.00 Standard Purchase Order



Related Actions for a Purchase Order

1. Enter Find Purchase Orders into the search bar.

workdoy@SLU	Q find purchase orders	
+ +	Find Purchase Orders - Report	+ + +
+ +	+ $+$ $+$ $+$ $+$ $+$ $+$ $+$	+ $+$ $+$

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

Find Purchase Orders							
Company							
Supplier							
Buyer							
Purchase Order Type							
Purchase Order							
Document Date On or After	07/11/2020						
Document Date On or Before	MM / DD / YYYY						
Due Date On or After	MM / DD / YYYY						
Due Date On or Before	MM/DD/YYYY						
ОК	Cancel						

Related Actions for Procurement Transactions



3. The **actions button c**an be found next to the purchase order number (icon with three dots). Click on the actions button and then **Purchase Order**.

✓ R€	Actions		Durchass Or	dau																										
ocument	Rushus Outer		Purchase Or	uer																										
xclude Ca	Accounting	>	Printable Version Status	Issued	Purchase (Order Lines 2 items				<u>≖</u> 00 ⊞																				
xclude Ck	Favorite Return	>	Company	Saint Louis University	Line	Description	Spen	nd Category	Extende	d Amount																				
Purchase					1	IM0442U CD2 FITC	Clini	ical Supplies		308.20 *																				
Purchase Order			Document Date Purchase Order Type	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020 (empty)	07/13/2020	2	B46023 - CD2 ECD	Clin	ical Supplies		348.40	
۹	>		Supplier	Beckman Coulter Inc	4. j					÷																				

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.

Jyer						 		
ocument	Actions		Purchase Or	der				
clude Ca	Accounting	>	Status	Issued	Purchase	Order Lines 1 item		
urchase	Favorite Receipt	, /	Company	Saint Louis University	Line	Description	Spend Category	Extended Amount
urchase Irder		1	Document Date	08/03/2020	1	Clorox Commercial Solutions Clorox Germicidal Bleach, Concentrated, 121 Ounce Bottles, 3 Bottles/Case (30966)	Clinical Supplies	33.20
~			Purchase Order Type	(empty)	4			
ď			Supplier	Staples Contract and Commercial				
Q				Inc				
۹			Buyer	Jennifer Puricelli				
Q			Payment Terms	1% 1 Day				
			Chinaiaa Taama	500				

Related Actions for Procurement Transactions



• **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).

 <i>R</i>ε Buyer 	Actions Purchase Order >	Purchase Or PO-000102240	der				
Document	Accounting >	Status	Issued	Purchase	Order Lines 1 item		
Exclude Ca	Favorite >	Contractor	Saint Louis	Line	Description	Spend Category	Extended Amount
Exclude Ch	Net an I	Document Date	07/30/2020	1	Courier Service for clinical specimens 07/20/20-07/24/2020. Invoice 125135 dd 07/26/2020	Postage/Shipping	185.90
Purchase		Purchase Order Type	(empty)	4			•
Order		Supplier	Arch Express				
٩		Buyer	Jennifer Puricelli				
		Payment Terms	Net 1				
٩		Shipping Terms	FOB Destination				
		Currency	USD				
Q		Supplier Contract	(empty)				
Q		Total Amount	185.90				

* 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 <u>billikenbuyadmin@slu.edu</u>.



Related Actions for Procurement Transactions

Related Actions for a Supplier Contract

1. Enter Find Supplier Contracts into the search bar.

workday@SLU	find supplier contracts
+ +	Find Supplier Contracts - Report
+ + -	Find Expiring Supplier Contracts - Report

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

company *	× Saint Louis University …	:=
Supplier	× Staples Contract and Commercial Inc	:=
Order-From Connection		:=
Contract Name		
Contract Type		:=
Status		:=
Contract Start Date On or After	MM / DD / YYYY	
Contract Start Date On or Before	MM/DD/YYYY	



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**.

							×	
← FI	Actions		Supplier Contract		×	6		
Company	Supplier Contract) ><	Add Note	0: D351 Staples FY21			- 1	
Supplier	Favorite	>	Amend Supplier Contract				- 1	
			Change	SCON-000100360			- 1	
			Close	07/22/2020 03:28:53.387 PM			- 1	
73 items			Сору	Approved			- 1	
Supplier			Printable Version	Approved			- 1	
Contract			Version	0			- 1	mpany
Q			Company	Saint Louis University			- 1	int Louis Ur
			Supplier	Staples Contract and Commercial Inc			- 1	
Q			Contract Name	D351 Staples FY21				int Louis Un
٩			Contract Type	Blanket Order for Punchout Supplier				aint Louis Un
Q			Contract Specialist	Cathy Baumann				int Louis Un
			Buyer	Cathy Baumann			- 1	
Q,			Effective Date	07/01/2020 00:00:00.000 CDT				aint Louis Un
٩			Contract End Date	06/30/2021 00:00:00.000 CDT				aint Louis Un
٩			Contract Reference	FY20 Blanket Order #: EP135147			1	int Louis Ur
			Currency	USD				
4		_	Ŧ	1 500 00		_		hint Louis Ur

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.