If the Supplier is not active in Workday:

- Ensure the Supplier is active in Workday

Obtain ship to/deliver to addresses

If restricted goods or services: consult Policies 3210, 3220, and 4209

If sponsored award or restricted gift funds: Consult Policies 2200 and 3200 PR.02

Gather quantity, description, specifications, catalog number, etc. (refer to step 2 of this Quick Reference Guide if these items are unknown).

Obtain ship to/deliver to addresses

Obtain charging instructions

Ensure purchase method in Buying Guide is utilized

Secure any documentation (including Contracts) as required by Policies 3201 and 3210

Ensure you are assigned the correct Workday role for purchase submission

Ensure the Supplier is active in Workday using the “Find Suppliers” report

If the Supplier is not active in Workday:

- Submit a new Supplier Request per Procedure 3401 PR.01

Choose correct requisition type based on directions in Section 3.A of Procedure 3201 PR.01

If item is available in the catalog: Select “Connect to the Supplier’s Website”, shop for items, and return the item(s) to the Workday shopping cart.

If good or service is NOT available in the catalog: select “Request Non-Catalog Items” purchase type in Workday

Remember the description entered will be listed on the PO sent to the Supplier

Ensure all documentation required per Policy 3201 is attached (see Step 1)

If a contract is required per Policy 3210: ensure the signed contract is attached (see Step 1)

If help is needed identifying a Supplier: submit request through the Purchasing Intake Portal with all relevant documentation attached

If help is needed determining sourcing strategy: submit request through the Purchasing Intake Portal with all relevant documentation attached

If a contract needs to be negotiated, reviewed, and/or executed: submit request through the Purchasing Intake Portal with all relevant documentation attached

If review of supporting and/or required documentation is needed: submit request through the Purchasing Intake Portal with all relevant documentation attached

If item is available in Workday's catalog: select the correct requisition type and submit order for approval

If purchase is for Capital Equipment: each item must be itemized onto a separate goods line (regardless of quantity)

If the number of goods items being purchased is more than 15 items:

- Each item must be itemized onto a separate goods line

If the number of goods items being purchased is 15 items or less:

- Each item must be itemized onto a goods line (regardless of quantity)

If the number of goods items being purchased is 50 or more items:

- Each item must be itemized onto a separate goods line

If purchase is for services with a multi-year term: enter the total value of all years as a single service line, unless the Supplier or funding source requires each year listed separately on the PO

If purchase is for services with a known value: submit estimated total value for a period of one year with supporting documentation

If purchase is for services with a multi-year term: enter the total value of all years as a single service line, unless the Supplier or funding source requires each year listed separately on the PO

If purchase is for services without a known value: submit estimated total value for a period of one year with supporting documentation

If good or service is NOT available in the catalog: select “Request Non-Catalog Items” purchase type in Workday

Enter purchase value using the correct line type and submit order for approval

Ensure all documentation is properly retained per Policy 3201

Ensure the balance on the PO is monitored for sufficient funds and a Change Order is submitted, when necessary, per Section 5 of Procedure 3201 PR.01

Ensure all relevant changes are made to the PO to align with the latest contract

Ensure the PO is not overutilized or reused inappropriately. When necessary, submit a Change Order per Section 5 of Procedure 3201 PR.01.

If the PO has a remaining balance and all goods are received and/or services are complete: ensure the PO is closed by submitting a request through the Purchasing Intake Portal

If the PO has a remaining balance and all goods are received and/or services are complete: ensure the PO is closed by submitting a request through the Purchasing Intake Portal

If purchase is for services with a known value: enter the total value of the purchase on a single service line

If purchase is for services without a known value: submit estimated total value for a period of one year with supporting documentation

If purchase is for services with a multi-year term: enter the total value of all years as a single service line, unless the Supplier or funding source requires each year listed separately on the PO

If purchase is for Capital Equipment: each item must be itemized onto a goods line (regardless of quantity)

If the number of goods items being purchased is 15 items or less: Itemize each item onto a separate goods line

If the number of goods items being purchased is more than 15 items:

- Enter the total value on a single service line

If goods purchase has a bulk discount applied to the quote: the Supplier should revise the quote to reflect a discount on each item; if not possible, the purchase should be submitted as a single service line

If goods purchase has a significant shipping/freight cost that is required to be on the PO: the cost should be entered as a separate goods line

If goods purchase includes installment payments: enter each installment as a separate goods line

If the Supplier is not active in Workday:

- Ensure all relevant changes are made to the PO to align with the latest contract

- Ensure the balance on the PO is monitored for sufficient funds and a Change Order is submitted, when necessary, per Section 5 of Procedure 3201 PR.01

- Ensure all relevant changes are made to the PO to align with the latest contract

- Ensure the PO is not overutilized or reused inappropriately. When necessary, submit a Change Order per Section 5 of Procedure 3201 PR.01.

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- Ensure all relevant changes are made to the PO to align with the latest contract

- Ensure the balance on the PO is monitored for sufficient funds and a Change Order is submitted, when necessary, per Section 5 of Procedure 3201 PR.01