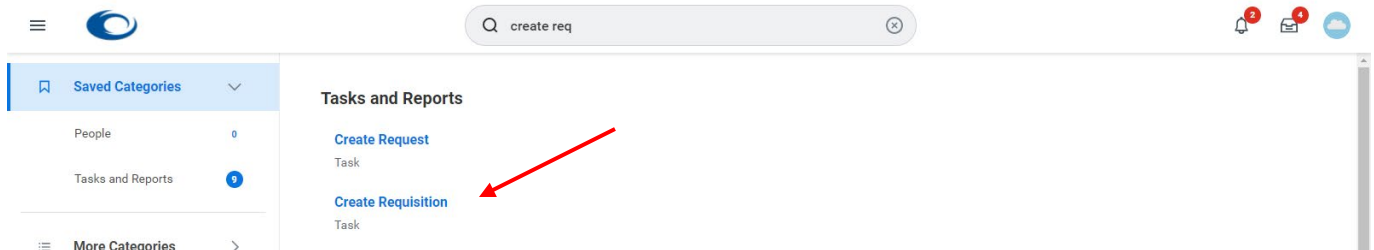


CREATE A PROCUREMENT REQUEST – Connect to Supplier Website (Punchout)

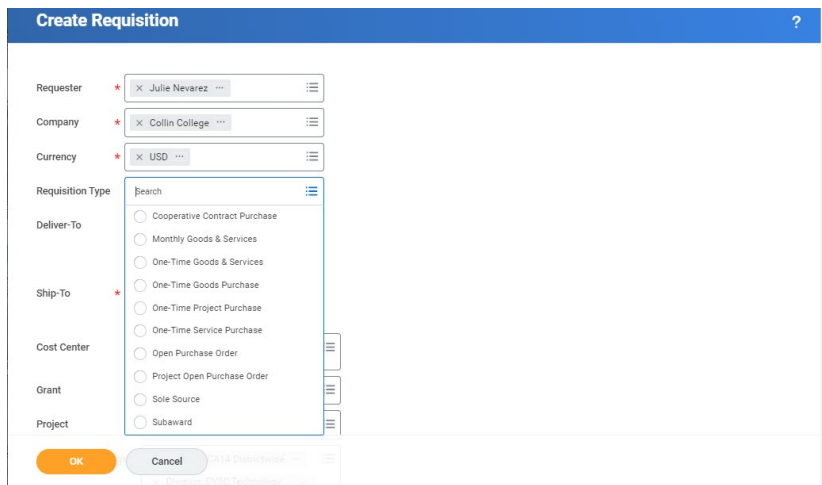
You can create a procurement request to order goods and services. A separate procurement request should be created for each supplier.

From your home page:

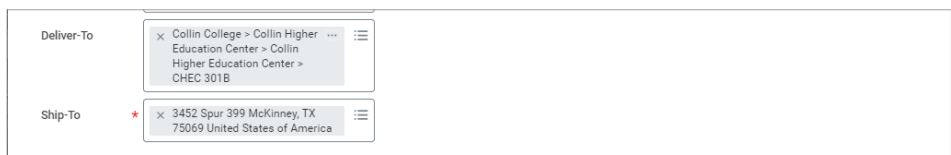
1. Enter *create requisition* in the Search bar. Choose the *Create Requisition Task*.



2. Confirm your *Requester (name), Company, and Currency*. *Requisition Type* (see [Appendix A](#) for Usage) is optional at this point but will be required later in the process.



3. The *Deliver-To* and *Ship-To* (address) will auto-populate after being used. Confirm that this is the correct *Deliver-To/Ship-To*. **Making a Ship-To choice at the header is the only opportunity to make a selection that will be sent to the supplier.** Making a change at the line level will NOT be sent to the supplier. The *Deliver-To* does not go out to the supplier. It is for internal purposes or desktop delivery.



NOTE: A Desktop Delivery Ship-To Location address is required when creating requisitions for Staples and America To Go Punchouts. The address must be changed on this screen before going into the supplier connection. The address cannot be changed after leaving this screen.

When selecting the Ship-To Address, click on the 3 dashes, select *Addresses by Ship-To Locations*.

Create Requisition

Requester	X Katherine Rios
Company	X Collin College
Currency	X USD
Requisition Type	<ul style="list-style-type: none"> Default Addresses > Addresses by Company > Addresses by Location > Addresses by Location Hierarchy > Addresses by Ship-To Locations >
Deliver-To	Search
Ship-To	<ul style="list-style-type: none"> X 3452 Spur 399 McKinney, TX 75069 United States of America

Select the Desktop Delivery Ship To Location. The Desktop Delivery Address will be displayed at the Header Level in the Ship-To Address field and in the *Ship-To Address Column* at the line level.

Create Requisition

Requester	X Katherine Rios
Company	X Collin College
Currency	X USD
Requisition Type	<ul style="list-style-type: none"> Desktop Delivery Ship to Locations - Celina > Desktop Delivery Ship to Locations - CHEC > Desktop Delivery Ship to Locations - Courtyard > Desktop Delivery Ship to Locations - Farmersville > Desktop Delivery Ship to Locations - Frisco > Desktop Delivery Ship to Locations - McKinney > Desktop Delivery Ship to Locations - Plano > Desktop Delivery Ship to Locations - PSTC > Desktop Delivery Ship to Locations - Technical Campus >
Deliver-To	Search
Ship-To	<ul style="list-style-type: none"> X 3452 Spur 399 McKinney, TX 75069 United States of America

- After using a Cost Center or Grant, it should auto-populate the *Additional Worktags*. To change the Cost Center, Click on the x to the left of the existing Cost Center then enter or select a cost center. Click in the *Deliver-To* field to find or search for the building and office for delivery. If using a Grant or Project, do not enter the Cost Center. Grant and Project will update cost center and all other Worktags.



Procurement:

CREATE A PROCUREMENT REQUEST – Connect to Supplier Website (Punchout)



Requisition Type: One-Time Goods Purchase

Deliver-To: Collin College > Collin Higher Education Center > Collin Higher Education Center > CHEC 301B

Ship-To: 3452 Spur 399 McKinney, TX 75069 United States of America

Cost Center: CC1142 Chief Innovation Officer

Grant:

Project:

5. Either begin typing a keyword from the new *Cost Center's* name and hit the Enter key to get a short list, or

Search Results (39)

- CC1097 Campus Technology Services - CHEC
- CC1098 Campus Technology Services - Courtyard
- CC1099 Campus Technology Services - Districtwide
- CC1100 Campus Technology Services - Frisco
- CC1101 Campus Technology Services - McKinney
- CC1102 Campus Technology Services - Plano
- CC1103 Campus Technology Services - Rockwall
- CC1104 Campus Technology Services - Technical Center
- CC1105 Campus Technology Services - Wylie
- CC1178 Computer Network Technology - Frisco

technology

use the three dashes (dropdown) to search available *Cost Centers*. *Additional Worktags* should auto-populate when the *Cost Center* or *Grant* is entered.

Requester: Julie Nevarez

Company: Collin College

Currency: USD

Requisition Type: One-Time Goods Purchase

Deliver-To: Collin College > Collin Higher Education Center > Collin Higher Education Center >

Ship-To: My Worktags >
Active Cost Centers >
Active Cost Centers by Cost Center Hierarchy >

Cost Center: Search

Grant:

Project:

6. Click on the **OK** button at the bottom left.
7. There are three methods to make a purchase:
 - a. Search Catalog (for Voss Lighting, Filter Systems and Einstein Printing)
 - b. Request Non-Catalog Items
 - c. Connect to Supplier Website (Punchout)



Procurement:

CREATE A PROCUREMENT REQUEST – Connect to Supplier Website (Punchout)



Create Requisition

Company: Collin College | Requester: Julie Nevarez | Currency: USD

Instructions

Enter Spend Instruction Here

Select an Option

Search Catalog
Search the internal catalog of preferred items and suppliers to add into the shopping cart.

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



- 8. For this demonstration, Click on the *Connect to Supplier Website* link.
- 9. Scroll to your supplier of choice then Click on the *Connect* button to the right.

Connect to Supplier Website

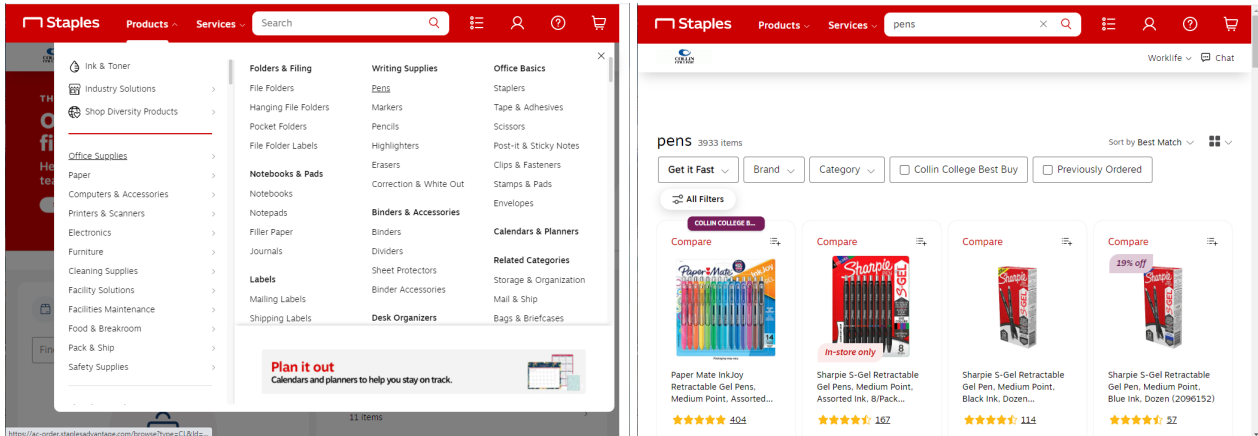
Company: Collin College | Requester: Julie Nevarez | Currency: USD | Requisition Type: One-Time Goods Purchase

Turn on the new tables view:

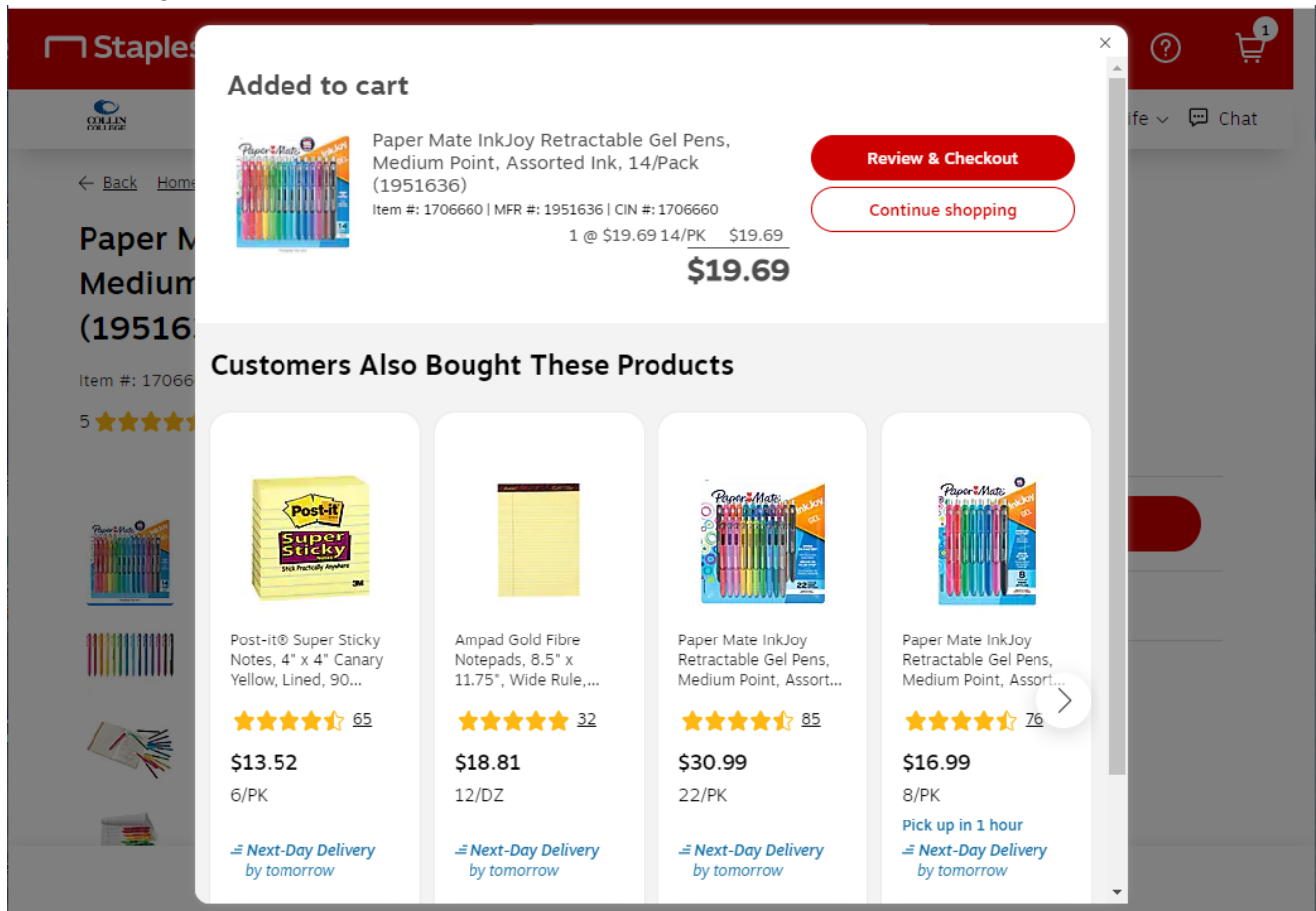
Supplier Websites: 11 items

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
	Staples		Punchout Staples Business Advantage		<input type="button" value="Connect"/>
	Dell		Punchout Dell Marketing LP		<input type="button" value="Connect"/>

- Use the *Products* dropdown (down pointing caret), or the *Search* at the top to locate items, such as pens.



- Click on the item to review the details then enter a quantity then Click on the *Add to cart* button.
- You will be given the option to *Continue shopping* or *Review & Checkout*.





Procurement:

CREATE A PROCUREMENT REQUEST – Connect to Supplier Website (Punchout)



13. After all items have been selected and you have Clicked on the *Review & Checkout* button, Click on the *Submit Order* button at the bottom to return the items to your Workday cart.

The screenshot shows the Staples website interface. At the top, there is a red header with the Staples logo and a search bar. Below the header, the page displays "1 item in cart". The item is "Paper Mate InkJoy Retractable Gel Pens, Medium Point, Assorted Ink, 14/Pack (1951636)". The item details include "Item # 1706660 | MFR # 1951636 | CIN # 1706660". There is a quantity input field with the value "3". Below the quantity, there are two radio buttons: "Delivery" (selected) and "Pick up in store". The unit price is "@ \$19.69 14/PK" and the total price is "\$59.07". At the bottom of the item card, there is a "Remove" link. Below the item card, there is an "Order Summary" section. It shows "Items (1) \$59.07" and "Total \$59.07". There is a red "Submit Order" button. At the bottom of the page, there is a footer with the text: "This web site is intended for use by US residents only. Copyright 2021, Staples, Inc. All Rights Reserved. Site Map | Feedback | Policy Terms & Conditions | Privacy Notice | Cookie Preferences | Do Not Sell My Personal Information | California Notice".

14. Enter a Memo for Internal Purpose Only. This field is not sent to the supplier.

The screenshot shows the Workday procurement interface. On the left, there is a list of items with "1 item" at the top. The item is "Paper Mate InkJoy Retractable Gel ..." with a quantity of "3" and a price of "\$59.07". On the right, there is an "Edit" section. The "Description" is "Paper Mate InkJoy Retractable Gel Pens, Medium Point, Assorted Ink, 14/Pack (1951636)". The "Supplier Item Identifier" is "1706660". The "Spend Category" is "(empty)". The "Supplier" is "Punchout Staples Business Advantage". The "Supplier Contract" is "SCON-100095: Office Supplies". The "Quantity" is "3". The "Unit of Measure" is "Pack". The "Unit Cost" is "19.69". The "Extended Amount" is "59.07". At the bottom of the "Edit" section, there is a "Memo" field with a text input area. At the bottom of the page, there are two buttons: "Checkout" and "Continue Shopping".

15. Click on the Checkout button at the bottom left.
16. Scroll down to the Goods line(s) and to the right to see the Requested Delivery Date. Enter or choose a delivery date from the calendar widget. It is suggested that you give at least a two week out date to



Procurement:

CREATE A PROCUREMENT REQUEST – Connect to Supplier Website (Punchout)



allow time for approvals and supplier delivery.

17. Search for or enter a Spend Category (similar to Account), such as SC1017 General Supplies.

18. The Activity field can be used to send a message to a system user by using an @ symbol and searching for the user.

19. Click on the Submit button at the bottom left.

20. Your requisition number, your name, the date, and the amount will be displayed at the top. Click on the right pointing caret to the left of Details and Process to view the details.



Procurement:

CREATE A PROCUREMENT REQUEST – Connect to Supplier Website (Punchout)



21. Click on the Process tab and scroll down to see the Remaining Processes button. When you Click on the Remaining Process button at the bottom left, you can see the approvals.

You have submitted Requisition: REQ-100894, Requester: Julie Nevarez, Date: 09/23/2021, Amount: \$59.07

Up Next

Check Budget (Financial) for Requisition - Batch/Job: Run Budget Check

Details and Process

For [REQ-100894](#)

Overall Process [Requisition: REQ-100894, Requester: Julie Nevarez, Date: 09/23/2021, Amount: \\$59.07](#)

Overall Status [In Progress](#)

Due Date [10/07/2021](#)

Details **Process**

Process History 4 items

Process	Step	Status	Completed On	Due Date	Person	Comment
Requisition Event	Requisition Event	Step Completed	09/23/2021 03:04:08 PM	10/07/2021	Julie Nevarez	
Requisition Event	Complete Questionnaire	Not Required		10/07/2021		
Check Budget (Financial)	Check Budget (Financial)	Automatic Complete	09/23/2021 03:04:08 PM	09/25/2021		
Check Budget (Financial)	Batch/Job: Run Budget Check	Launched	09/23/2021 03:04:08 PM			

View Remaining Process Requisition: REQ-100894, Requester: Julie Nevarez, Date: 09/23/2021, Amount: \$59.07

Remaining Process 16 items

Process	Step	Group	Person
Requisition Event	Approval by Project Manager (All)	Project Manager	
Requisition Event	Approval by Project Manager Level 2 (All)	Project Manager Level 2	
Requisition Event	Approval by Cost Center Manager Level 2 (All)	Cost Center Manager Level 2	Michael Dickson
Requisition Event	Approval by Cost Center Manager Level 2 (All)	Cost Center Manager Level 2	Michael Dickson
Requisition Event	Approval by Award Contract Specialist	Award Contract Specialist	Jana Walker Nicole Lohse-Liu
Requisition Event	Approval by Spend Category Manager (All)	Spend Category Manager	
Requisition Event	Approval by Business Asset Tracking Specialist	Business Asset Tracking Specialist	Christine Lin