Procurement:

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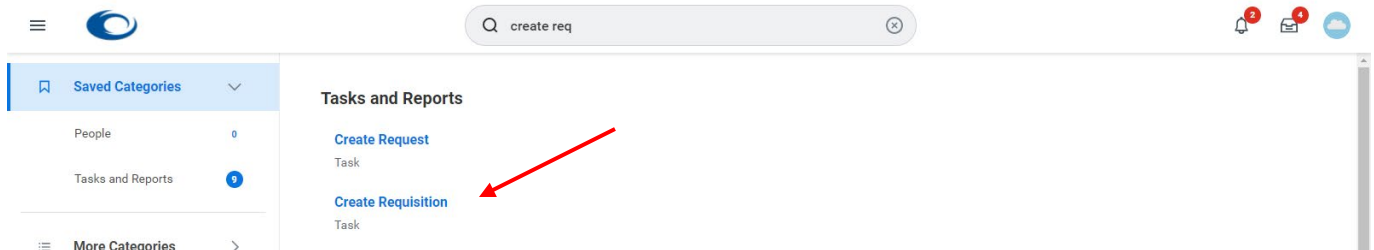
COLLIN COLLEGE

workday.

## 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.
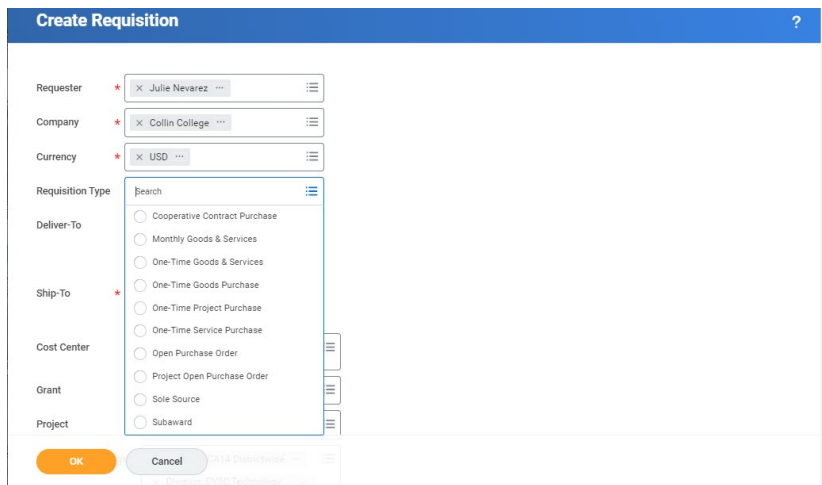
3. The *Deliver-To* and *Ship-To* (address) will auto-populate after being used. Confirm that this is the correct Deliver-To/Ship-To. Making a Ship-To choice at the header is the only opportunity to make a selection that will be sent to the supplier. Making a change at the line level will NOT be sent to the supplier. The Deliver-To does not go out to the supplier. It is for internal purposes or desktop delivery.
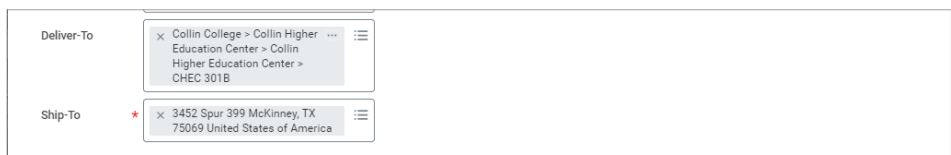
NOTE: A ***Desktop Delivery Ship-To Location*** address is required when creating requisitions for Staples and America To Go Punchouts. The address must be changed on this screen before going into the supplier connection. The address cannot be changed after leaving this screen.

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

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.

4. 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.

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

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

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)

8. For this demonstration, Click on the *Connect to Supplier Website* link.

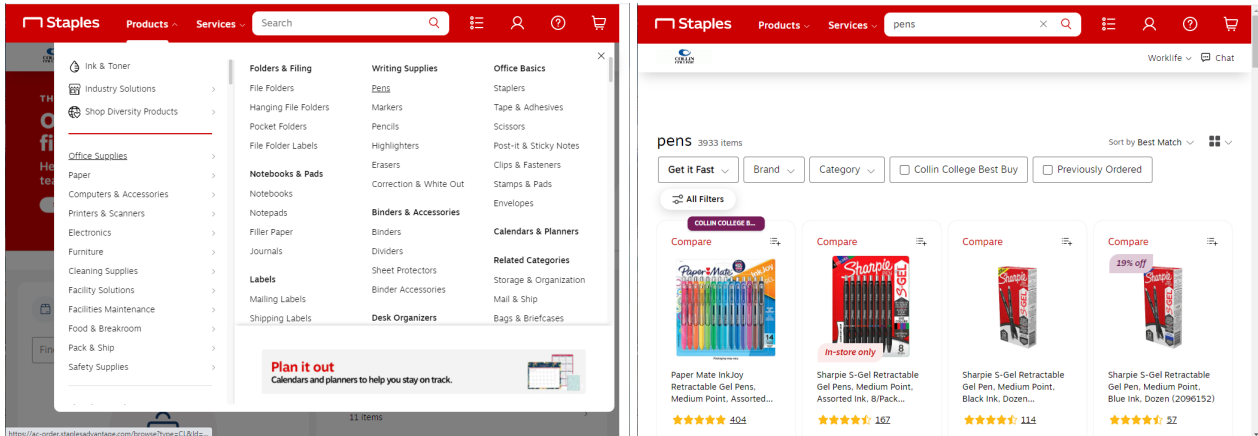9. Scroll to your supplier of choice then Click on the *Connect* button to the right.

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

11. Click on the item to review the details then enter a quantity then Click on the *Add to cart* button.

12. You will be given the option to *Continue shopping* or *Review & Checkout*.
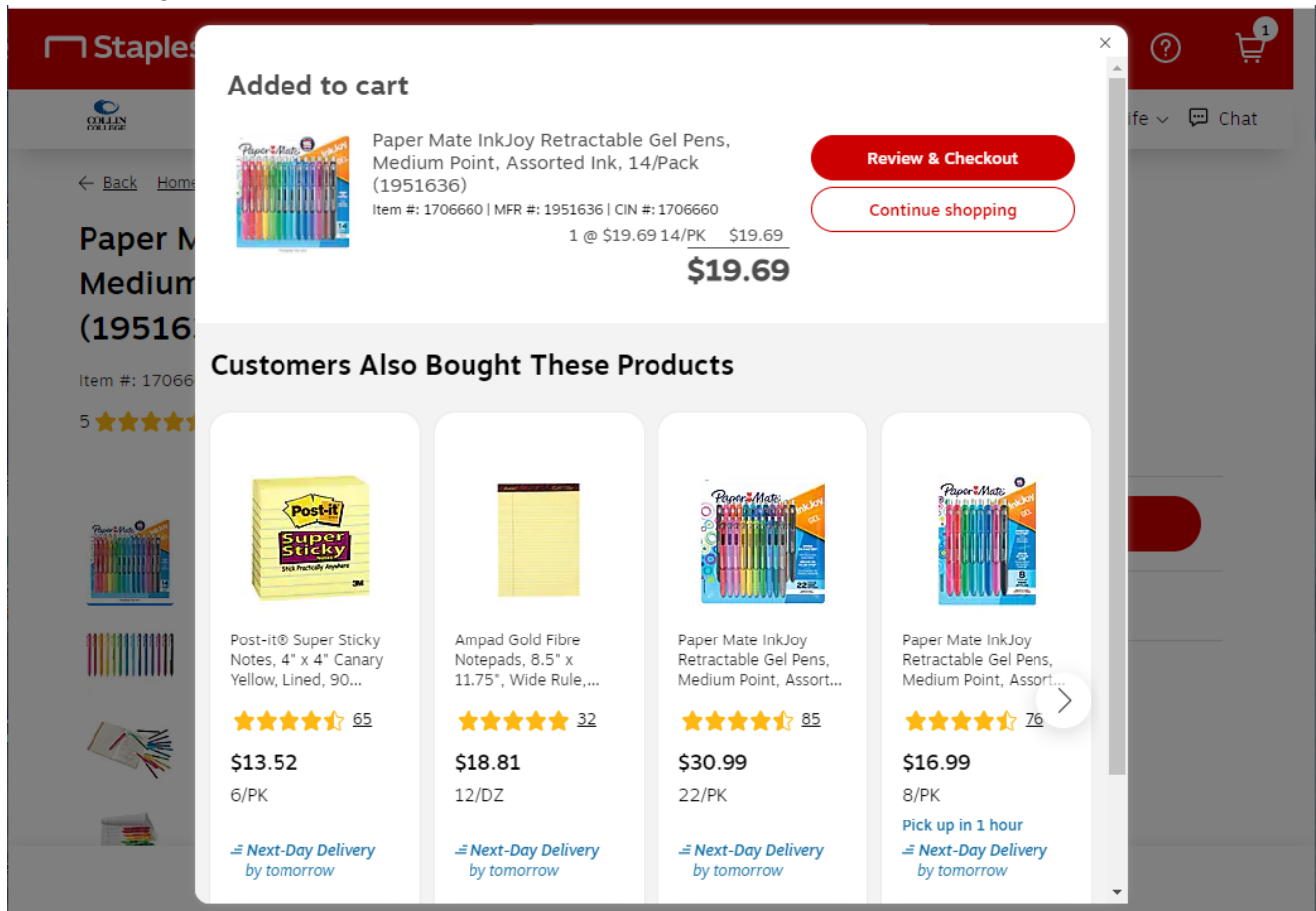
13. After all items have been selected and you have Clicked on the *Review & Checkout* button, Click on the *Submit Order* button at the bottom to return the items to your Workday cart.

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

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

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.

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.