This Quick Reference Guide is a summary and should be used alongside, not as a replacement for, document 3201 PR.01. For detailed information on roles, responsibilities, and process steps, please refer to 3201 PR.01.

1. Take all necessary steps before initiating your request
   - Document business need
   - If restricted goods or services: consult Policies 3210, 3220, and 4209
   - If sponsored award or restricted gift funds: Consult Policies 3220 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

2. Submit request in Purchasing Intake Portal if necessary
   - 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 a contract is required per Policy 3210: ensure the signed contract is attached (see Step 1)
   - If review of supporting and/or required documentation is needed: submit request through the Purchasing Intake Portal with all relevant documentation attached
   - If goods purchase includes installment payments: enter each installment as a separate goods line
   - If number of goods items being purchased is more than 15 items: Enter the total value of all items as a separate goods line
   - If number of goods items being purchased is 15 items or less: itemize each item onto a separate goods line
   - If policy does not apply: submit order for approval

3. Select “Create Requisition” Task and enter/attach all required info
   - 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
   - If a contract is required per Policy 3210: ensure the signed contract is attached (see Step 1)
   - If if purchase is for Capital Equipment: the total value on a single service line should be entered as a single goods line
   - If if purchase is for Capital Equipment: the cost should be entered as a single goods line
   - If number of goods items being purchased is 15 items or less: itemize each item onto a separate goods line
   - If number of goods items being purchased is more than 15 items: Enter the total value of all items as a separate goods 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

4. Enter purchase value using the correct line type and submit order for approval
   - If if purchase is services with a known value: enter the total value of the purchase on a single service line
   - If if purchase is for services without a known value: submit estimated total value for a period of one year with supporting documentation
   - If 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 if purchase is for Capital Equipment: each item must be itemized onto a goods line (regardless of quantity)
   - If if number of goods items being purchased is 15 items or less: itemize each item onto a separate goods line
   - If if number of goods items being purchased is more than 15 items: Enter the total value of all items as a separate goods line
   - 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)

5. Manage the Purchase Order
   - 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
   - Ensure all documentation is properly retained per Policy 1105

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