



FINANCE:
The Procurement Lifecycle



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Benefits of using Workday Financials:

- Automates the request process
- Allows full visibility into the business processes and approval flow
- Standardized location of attachments
- Interconnected transactions within the lifecycle

The following roles within the system are related to the Procurement Lifecycle functions:

- Cost Center Requisitioner
- Cost Center Manager
- Specialty Managers



OBJECTIVES



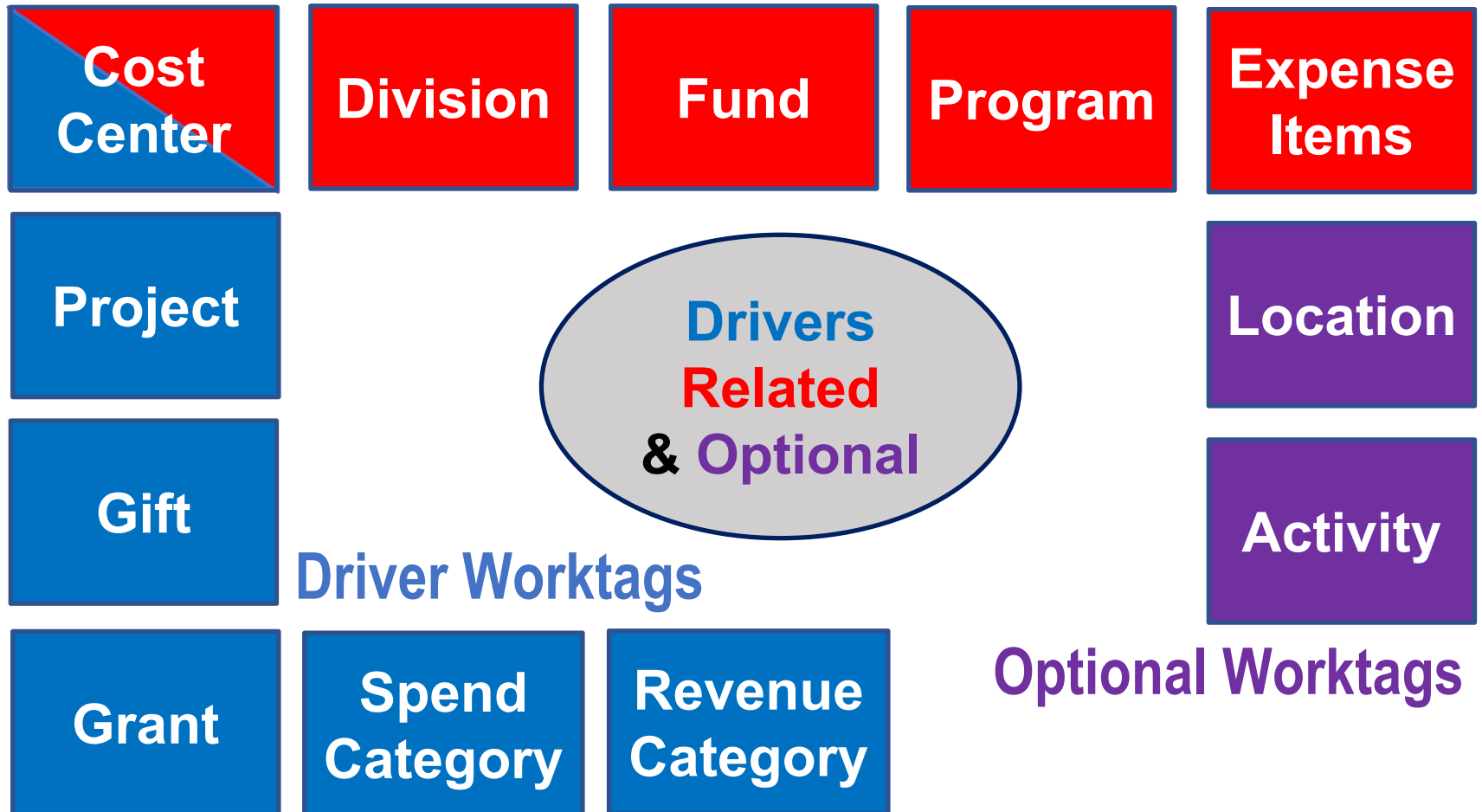
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By the end of this class, you will be able to create and manage:

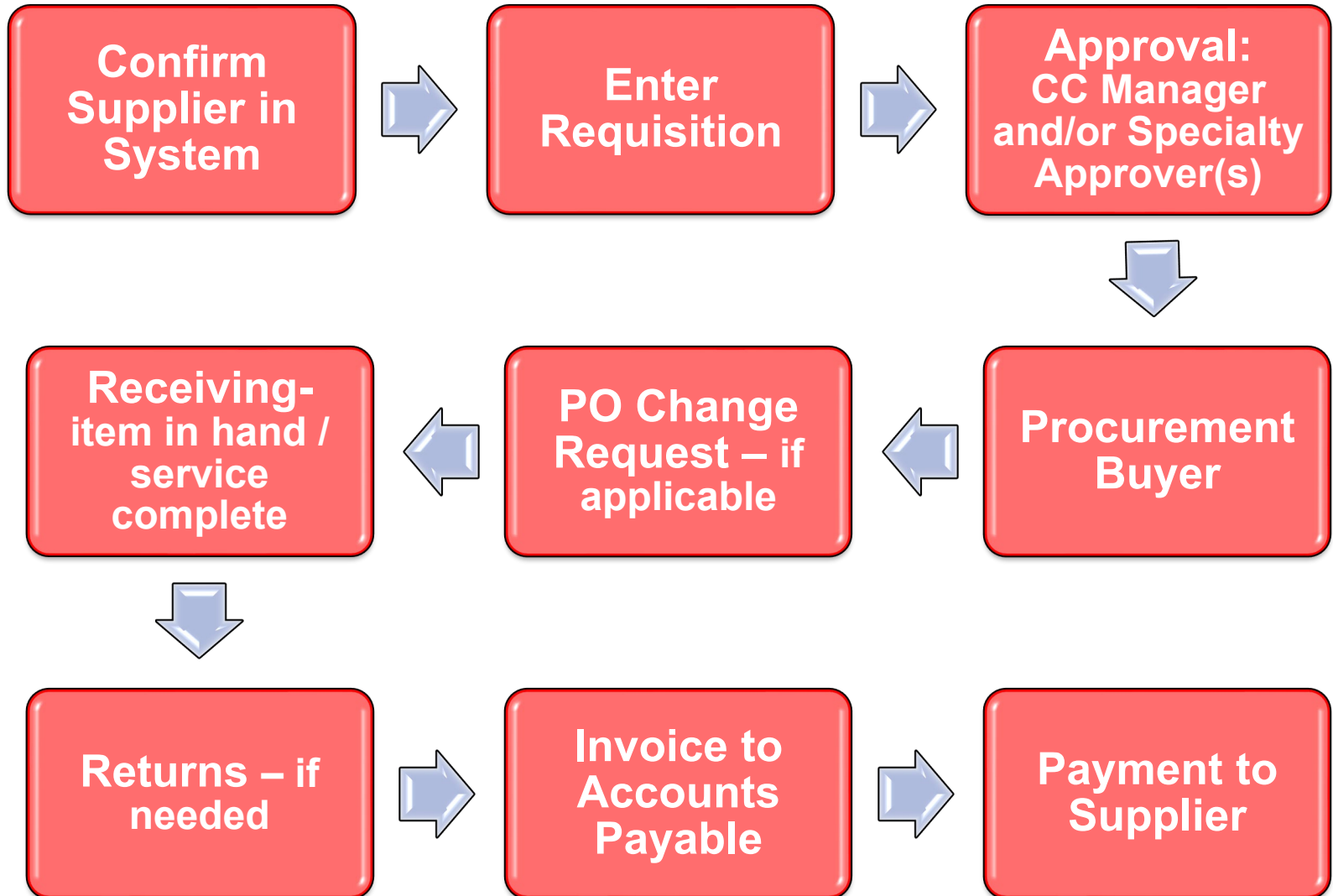
- Requisitions
- PO Change Order
- Receipts
- Returns

...within the **MSU Workday** system

Related Worktags



PROCUREMENT PROCESS



PROCUREMENT APPROVERS



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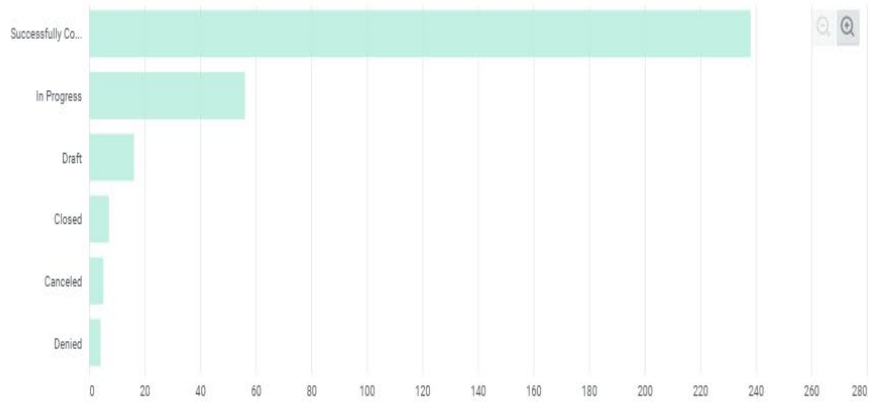
Depending on the item or service being requested, and by whom, there can be specific approvers added onto the approval process for a request.

Potential Request Approvers
Cost Center Manager
Grant Manager
Project Manager
Gift Manager
Information Technology Approver
Printing Approver
Chemicals Approver
Spend Category Buyer

PROCUREMENT DASHBOARD



Requisitions for Worker



Count

Count 326

Requisition Status	Total	
	Count	Amount
Successfully Completed	238	\$6,568,321
In Progress	56	\$2,495,498
Draft	16	\$93,188
Closed	7	\$25,231
Canceled	5	\$35,199
Denied	4	\$501,698
Total	326	\$9,719,135

[View More ...](#)

Purchase Orders by Date and Status



Closed

Issued

In Progress

Purchase Order Status	Sum of Total Amount Invoiced
Approved	\$0
Canceled	\$0
Change Order In Progress	\$0
Closed	\$13,722
Denied	\$0
Draft	\$0
In Progress	\$38,038
Issued	\$999,533
Total	\$1,051,293



RELATED COMMANDS



FIND SUPPLIER FOR REQUESTERS launches a report to find specific suppliers in the system

CREATE REQUISITION to request goods or services


CREATE CHANGE ORDER to edit issued purchase orders

CREATE RECEIPTS to enter partial or full receipts in the system

VIEW RECEIPTS launches a search for all of your receipts

CREATE RETURN to process a return within the system

MY REQUISITIONS to view all requisitions created by me



WHAT'S NEXT?



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- ★ **Financials and Performance Management** launch January 2020.
- ★ Keep up with the latest news and access training documentation on the Workday 2020 web page
- ★ For additional project questions, contact us at workday2020@montclair.edu
- ★ Need additional help? Contact the IT Service Desk at x 7971 option 2

OPEN LABS



WHAT?

- Bring Workday Finance questions/work
- Receive one-on-one help from Finance

WHEN?

- Begin the week of Go-Live
- Schedule is on the MSU Workday 2020 website
- Pick a day/time to work with a Finance Team Member

WHERE?

- University Hall