

Workday 2021R2 Release Feature

Upcoming Training Classes

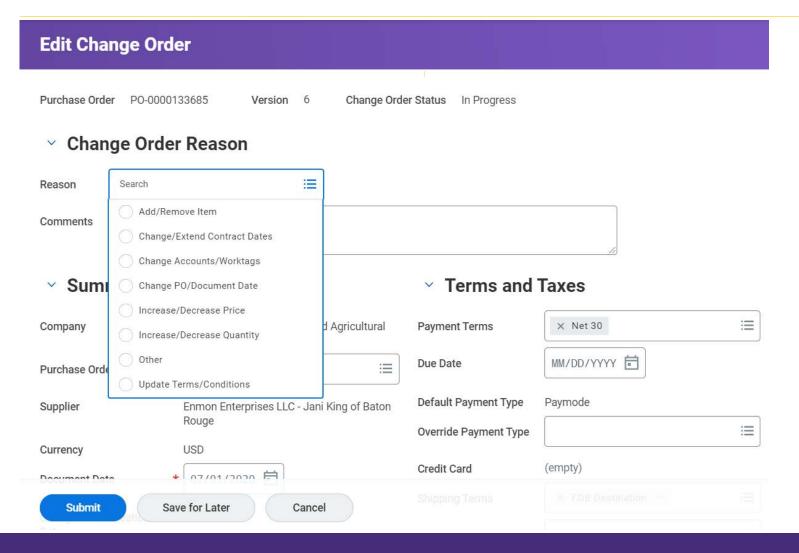


### **CHANGE ORDER REASON CODES**

Change Orders will now feature a drop down list of reason codes and a comments to provide additional information explaining the purpose of change order.

### **Notes:**

- The comment box is optional for all reason codes except 'Other.' If the 'Other' option is selected, users will be required to provide details in the comment box.
- The requirement to enter the purpose of the change order in the Memo field has been removed.



### CHANGE PURCHASE ORDERS WITHOUT CREATING CHANGE ORDERS

Procurement Services can now make minor (nonmonetary) changes on issued purchase orders without creating change orders. Fields that can be changed are:

- Bill-To Address
- Bill-To Contact
- Buyer
- Internal Memo
- Memo

- Payment Terms
- Purchase Order Type
- Ship-To Address
- Ship-To Contact

Additionally, PS can also manage attachments (add/remove) on purchase orders without the need to create change orders. Changes to add and remove attachments on purchase orders are displayed in the PO activity stream. This task can only be done on purchase orders in 'Approved, Canceled, Closed, and Issued' statuses.

#### Note:

- Changing the Ship-To-Contact on the PO is not tied to security; users needing to create receipts on a specific PO must have the Finance-Accountant Department role.
- Workday now also delivers a report tracking the changes to a purchase order in the related actions menu titled "View Purchase Order Changes."
- Both tasks must be done by Procurement Services. Requests to change any of these PO fields or attach documents should be submitted via email to Procurement Services at <a href="mailto:purchase@lsu.edu">purchase@lsu.edu</a>.

## MASS CHANGE REQUISITION REQUESTER

The requester can now be changed (in bulk) on requisitions in 'Draft' and 'In Progress' statuses. Once changed, the new requester can edit and submit the requisition for approval. The request must include the following:

- Requisition Number(s)
- Purchase Order Number(s)
- Current Requester Name
- Proposed Requester Name

Note: This does not change the Ship-To-Contact on the PO; Procurement Services will edit the PO Ship-To-Contact based on this request.

The task must be initiated by Procurement Services. Requests to change requisition(s) requesters should be submitted via email to Procurement Services at <a href="mailto:purchase@lsu.edu">purchase@lsu.edu</a>.

### MASS CANCEL PROCUREMENT DOCUMENTS

Incomplete procurement documents, such as requisitions and purchase orders, can now be canceled in bulk, upon request. This task must be done by Procurement Services and cannot be initiated on Requisitions in 'Successfully Completed' status or Purchase Orders in 'Change Order In Progress' status.

### MASS CLOSE PROCUREMENT DOCUMENTS

New filters have been added to the Mass Close Procurement Documents task to better refine search results and close a larger volume of purchase orders at once. Filters have been added to narrow search by Worktag and by Close Tolerance Type and Amount.

Requests to mass close purchase orders (5 or more POs) must now include the worktag associated with the POs. Worktags used on procurement transactions include Program, Project, Gift, Grant or Funding Source. If multiple worktags, the Cost Center number should be provided to widen the search scope.

Requests to mass cancel requisitions and purchase orders OR mass close purchase orders should be submitted via email to Procurement Services at <a href="mailto:purchase@lsu.edu">purchase@lsu.edu</a>, <a href="mailto:preferably">preferably</a> in an Excel spreadsheet.



### **UPCOMING TRAINING**

Training Session	Date and Time
Procurement Institute	Tuesday, September 21st 1:00 - 4:00 PM
Specs and More Specs	Wednesday, October 6 <sup>th</sup> 1:00 – 2:30 PM
Department Solicitations	Wednesday, October 6 <sup>th</sup> 2:30 – 3:30 PM
Professional, Specialty & Consulting Services	Thursday, October 21st 1:00 – 2:00 PM
Workday Procurement: Tips & Tricks	Wednesday, October 27 <sup>th</sup> 1:00 – 3:00 PM

Virtual Procurement Roundtable Meeting Tuesday, September 28<sup>th</sup> at 2:00 PM