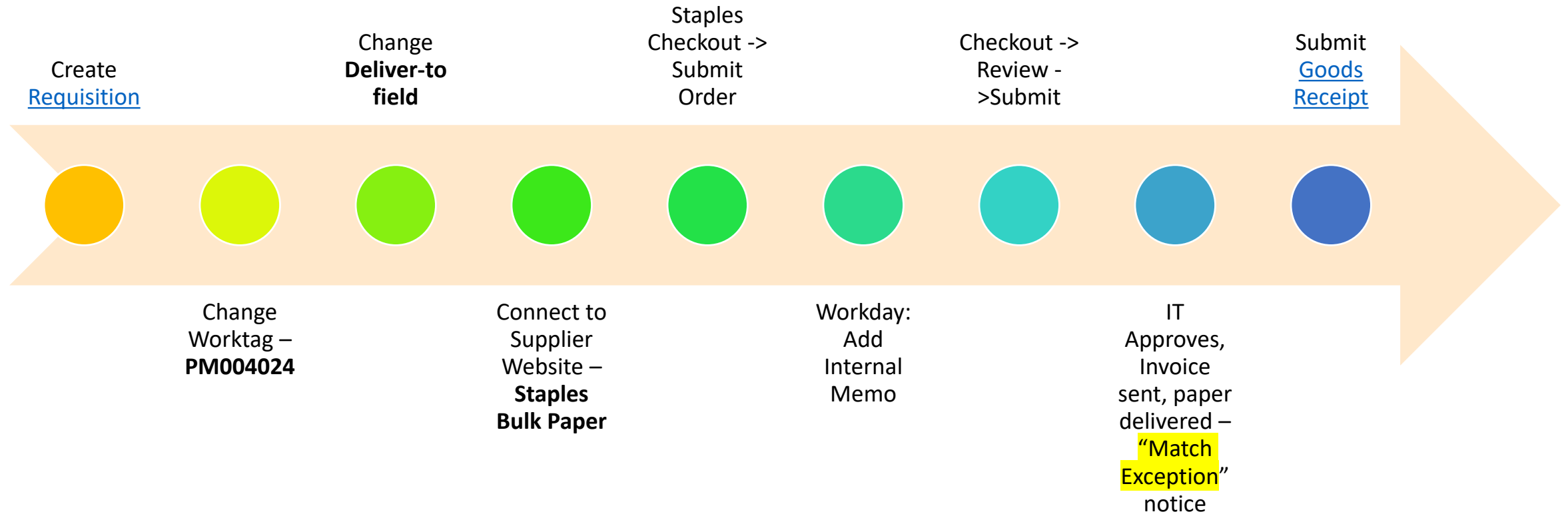


UBCO PRINT PAPER ORDERING PROCESS IN WORKDAY

NOVEMBER 2020



PRINTER PAPER ORDER PROCESS OVERVIEW



SUMMARY

In Workday,

- Purchases -> [Create Requisition](#)
- **Change Worktag** to PM004024
- **Change Deliver-To** to your dept mailroom (or printer location) – Search by 3 letter building code <space> room # (e.g. ASC 413)
- Connect to Supplier Website -> Staples Bulk Paper -> Connect

Search for (then click on description – NOT add to cart):

- DPP1977 (Letter Size 8.5 x 11),
- DPP1978 (Legal Size 8.5 x 14)
- DPP1343 (11 x 17)

Select “**Alternate Ordering Formats**” grey drop down menu to see other qty options (e.g. carton & skid)

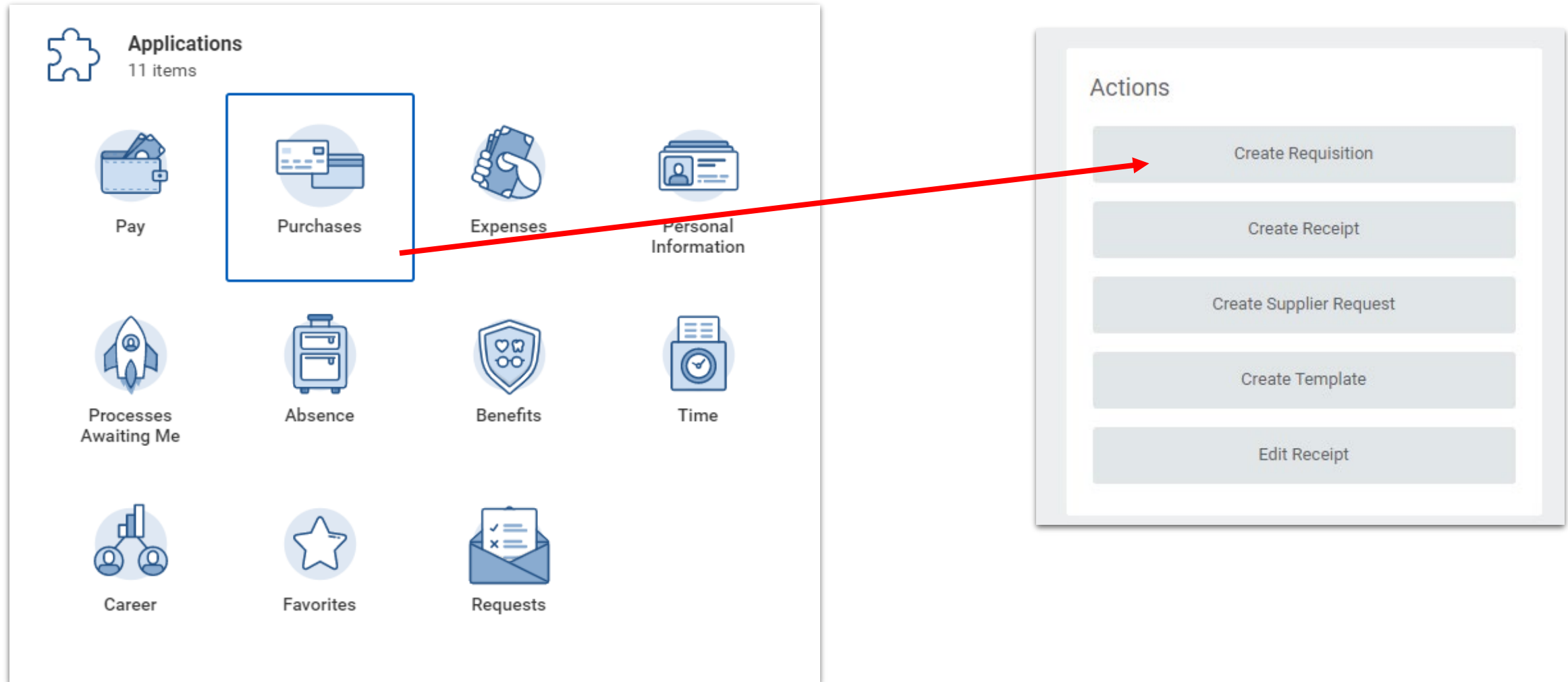
Add to cart desired quantity -> Checkout - > **Submit Order**

- Add Internal Memo – optional (if you want to indicate which Dept and/or Printer#)
- Click “Checkout” – review details - > Submit
- Request is sent to IT Admin to approve (IT covers all cost)
- Paper is delivered to **Deliver-to Location** (Approved Paper Account Holder)
- Submit **Purchases** -> [Create Receipt](#) to issue invoice to be paid (will be charged to IT)

Any questions contact Toni Lee (toni.lee@ubc.ca) or to onboard new staff who will be ordering paper



HOW TO ORDER PRINT PAPER IN WORKDAY ([PURCHASE](#))



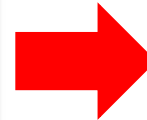
ENTER REQUISITION DETAILS

1 Select type: “**Purchase Requisition**”

The screenshot shows the 'ENTER REQUISITION DETAILS' form. The 'Requisition Type' dropdown menu is open, showing the following options:

- ☒ * Purchase Requisition
- ☐ Bill Only (Retroactive)
- ☐ Paid by Credit Card
- ☐ RFX/Competitive Bid Request
- ☐ Single Source Requisition

Other fields visible include Company (UBC The University of British Columbia), Requester (Erin Trifunov), Currency (CAD), Deliver-To, and Ship-To.



2 Confirm “**Deliver To**” is a specific room (e.g. where printer is, or dept. mailing room) – see **Slide 18** to change your default workspace)

The screenshot shows the 'ENTER REQUISITION DETAILS' form with the 'Deliver-To' dropdown menu open. The search results for 'EME 1' are displayed:

- ☒ UBC > UBC Okanagan Campus > Engineering, Management and Education Building (EME) > -1 > EME-Floor -1-Room 0020
- ☐ UBC > UBC Okanagan Campus > Engineering, Management and Education Building (EME) > -1 > EME-Floor -1-Room 0030

Other fields visible include Requisition Type (* Purchase Requisition), Ship-To, Program, Grant, and Project.

Note: if you update the Deliver-To field FIRST and then select the Purchase Type – the Deliver-To field will revert to the default workspace. To change your default workspace see **SLIDE 18**.

CHANGE PROGRAM TO IT WORKTAG

Program

× PM004024 Printing | Information Technology | AVP Finance and Operations - UBCO

Grant

Project

Gift

Cost Center

× CC00753 IT Service Delivery | Information Technology | AVP Finance and Operations - UBCO

Additional Worktags

Search

× Function: FN500 Computing and Communications

× Fund: FD000 General Purpose Operating

OK

Cancel

3

Change Program to: **PM004024**
– the Cost Centre and additional Worktags will be automatically populated

4

Click **“OK”**

CONNECT TO SUPPLIER WEBSITE: STAPLES BULK PAPER

Create Requisition

Instructions

- If you can't find required supplier when initiating a regular requisition, please create Supplier Request [here](#)

Select an Option

Request Non-Catalog Items

Request goods or services that are not available via a supplier website catalogue.

Connect to Supplier Website

Use this to connect to UBC catalogues hosted on supplier websites: Staples & VWR plus additional suppliers in the future.

Add from Templates and Requisitions

Add items to your cart using your requisition templates or previous requisitions.

Select from My Procurement

Select from my Favorite

Supplier Websites 6 items

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	
	Microserve		Microserve		Connect
	Staples		Corporate Express Canada Incorporated		Connect
	Staples Bulk Paper		Corporate Express Canada Incorporated		Connect
	VWR		VWR International Company		Connect
	Fisher Scientific		Fisher Scientific		Connect
	Praxair		Praxair Distribution Division of Praxair Canada Incorporated		Connect

1

2

SELECT PAPER TYPE & QTY

EN ▾

STAPLES
Business Advantage™

Search for all your business need

Account Help Cart

PRODUCTS ▾ SERVICES & SOLUTIONS ▾ FLYERS & PUBLICATIONS

Welcome to Workday/EWAY for Full Cartons of Copy Paper!

Please use this catalogue to order Full Cartons of Copy Paper showing CT or BX.

You can also order these Packs (PK) of paper - DPP1977 and DPP1973. You must order packs (PK) in Multiples of 10 for Full Carton delivery.

- 1 Use the **search bar** or click on **DPP1977** (Earth Choice 30% recycled copy paper)



Domtar EarthChoice830 Recycled Copy Paper, 8 1/2" x 11", 92 Bright, 20 lbs., 500 Sheets/Pack

★★★★★ (0 reviews)

Brand: DOMTAR

Item #: DPP1977

In Stock (Product usually ships next business day)

\$4.15
Pack

1 Add to Cart

- 2 Click on the product name (NOT Add to Cart yet)

SELECT SIZE & ORDER FORMAT (QTY)

Paper / Copy and Print Paper / Printer Paper - Environmentally Friendly / Recycled Paper

Domtar EarthChoice®30 Recycled Copy Paper, 8 1/2" x 11", 92 Bright. 20 lbs.. 500 Sheets/Pack

Item#: DPP1977 Manufacturer/Brand: DOMTAR

☆☆☆☆☆ (0 reviews)



8 1/2 x 11

8 1/2 x 11 3 hole

11 x 17

8 1/2 x 11

8 1/2 x 14

Alternate ordering formats

10 Packs = 1 Carton

400 Packs = 1 Skid

View product details

Add to shopping list

In Stock

Product usually ships next business day

Alternate code: 980068

\$4.15

1

Add to Cart

- 1 Click the drop down menu to display other paper size options
- 2 Click “Alternate ordering formats” to display other order size options (carton & skid)
- 3 Click “Add to Cart”

CHECKOUT

STAPLES
Business Advantage

Search for all your business needs

PRODUCTS ▾ SERVICES & SOLUTIONS ▾ PUBLICATIONS ▾

Paper / Copy and Print Paper / Printer Paper - Environmentally Friendly / Recycled Paper

Domtar EarthChoice®30 Recycled Copy Paper, 8 1/2" x 11", 92 Bright, 20 lbs., 5

Item#: DPP1977 Manufacturer/Brand: DOMTAR

☆☆☆☆☆ (0 reviews)

1 Item Order Number: EW81955459

DPP1977 1

Order total :
\$4.65

Checkout **View cart**

1

Click on “**Cart**” at the top right and select “**Checkout**” when the order is complete.

Order Checkout Process

1. Review & Confirm

[Return To Cart](#) **Submit Order** Order # : EW81955459 [View Order Details](#)

Review & Confirm

[Print View](#)

Order Details

QUANTITY	PRODUCT NUMBER	DESCRIPTION	YOUR PRICE	UOM	TOTAL
Order 1	DPP1977	Domtar EarthChoice®30 Recycled Copy Paper, 8 1/2" x 11", 92 Bright, 20 lbs., 500 Sheets/Pack	\$4.15	Pack	\$4.15
Ship 1		In Stock			
TOTAL					\$4.15

[Return To Cart](#) **Submit Order**

2

Confirm the details are correct then click “**Submit Order**”.

CHECK OUT PROCESS – ADD MEMO



1 item

Paper, Recycled 30%, earthchoice, 1...
\$4.15

1

Edit

Description

Paper, Recycled 30%, earthchoice, 11", 500/pk

Supplier Item Identifier

DPP1977

Spend Category

Office Supplies

Supplier

Corporate Express Canada Incorporated

Supplier Contract

(empty)

Quantity

1

Unit of Measure

Pack

Unit Cost

4.15

Extended Amount

4.15

Manufacturer Part Number

(empty)

Additional Item Identifiers

(empty)

Item Tags

(empty)

Memo

PRINTER LOCATION (e.g. ADM 024)
PRINTER NAME (if possible) (e.g.P0425)

Checkout

Continue Shopping ▾

VERIFY CHECKOUT DETAILS & ADD MEMOS

Checkout

Company
UBC The University of British Columbia

Requester
Erin Trifunov

Requisition
- new -

Status
Draft

Total Amount
4.65 CAD

Shipping Address

Deliver-To UBC > UBC Okanagan Campus > Campus Administration Building (ADM) > 1 > ADM-Floor 1-Room 011

Ship-To Address 1138 Alumni Avenue
Kelowna, BC V1V 1V7
Canada

1

Requisition Information

Request Date * 2020-11-16 ?

Currency * x CAD ?

Requisition Type x 1. Purchase Requisition ?

Sourcing Buyer ?

Submitted by Erin Trifunov

Memo to Suppliers 2

Internal Memo 3

Goods 5

4

Submit

Save for Later

Continue Shopping

...

Edit Requisition Defaults

Edit Address

Cancel

Verify details are correct:

1. **Deliver-to address**
2. Add **Memo to Supplier** if needed (e.g. delivery info to access rooms, or admin contact info for Central Receiving)
3. Add Internal Memo (e.g. printer # "P0xxx", printer location, key contact for delivery)
4. To **Edit** click three dots at bottom right
5. Once reviewed, click **SUBMIT**

OVERVIEW OF PROCESS



You have submitted

Requisition: REQ-0000000240, Requester:

Date: 29-Apr-2020, Amount: \$875.17

Actions

Up Next

Shelly Morrison

Approval by Cost Center Manager

Details and Process

For

REQ-0000000240

Overall Process

Requisition: REQ-0000000240, Requester:

Date: 29-Apr-2020, Amount: \$875.17

Overall Status

In Progress

Due Date

2020-05-06

Details

Process

> Shipping Address

> Information

> Goods

Done

Click Done

WHAT NEXT? MATCH EXCEPTION & CREATE RECEIPT



- Once the order is sent to be delivered by Staples they will email the invoice to Workday.
- The invoice will likely be received in Workday BEFORE you receive the paper which will trigger a Match Exception

From: UBC Notification <noreply@workday.svc.ubc.ca>

Sent: November 17, 2020 5:51 AM

To:

Subject: A Task Awaits You: Review Receipt Match Exceptions - Supplier Invoice: SI-0000002845

Please log into Workday and review or approve the transaction.

Business Process: Supplier Accounts Match Event for Supplier Invoice: SI-0000002845

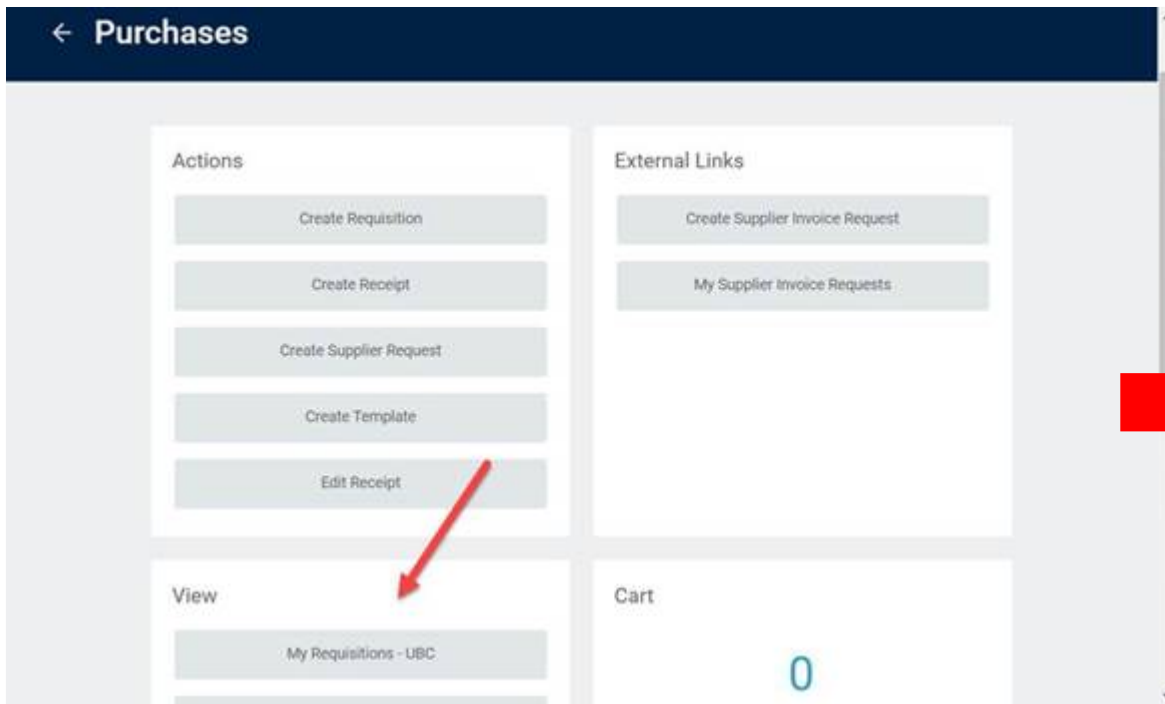
Subject: Supplier Invoice: SI-0000002845

- This is **not an error**, and will be cleared once you [Create a Receipt](#) in Workday
- The **Create Receipts** process enables Workday to automatically perform 3-way matching (i.e., matching information of the goods/services received, the Purchase Order and the supplier invoice) and if they all match, Workday will automatically approve the invoice and process payment.

HOW TO FIND & EDIT DRAFT REQUISITIONS

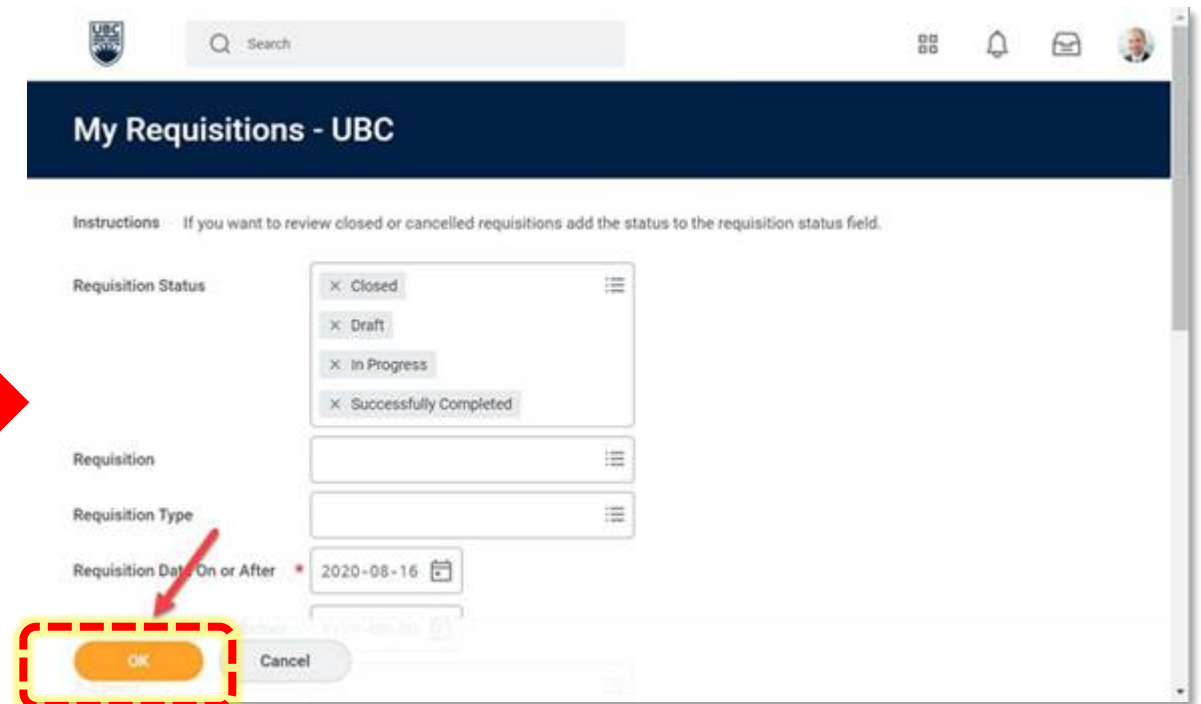
1

Open “**Purchases**” then under the VIEW box (lower left box) – select “**My Requisitions – UBC**”.



2

Select desired Requisition States, or dates, then click “**OK**”.



TO COMPLETE A DRAFT REQUISITION

UBC Search

← My Requisitions - UBC Actions

Requisition Status: Closed, Draft, In Progress, Successfully Completed

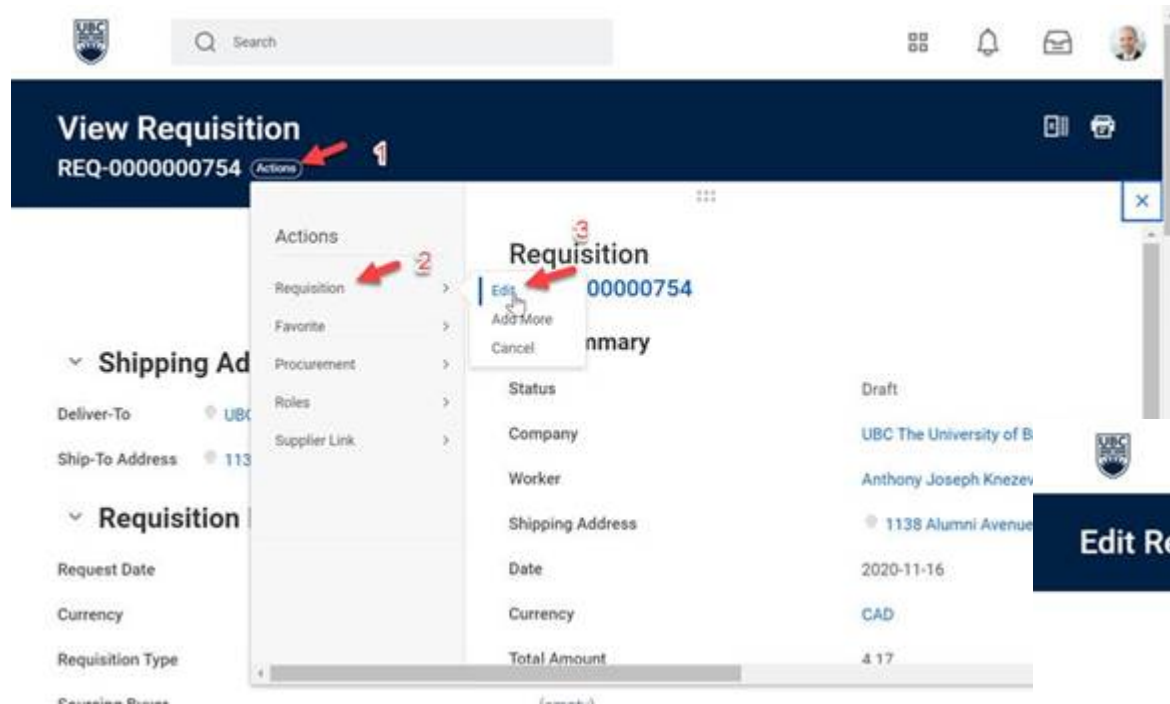
Requisition Date On or After: 2020-08-16

2 items

Requisition	Requisition Status	Requisition Type	Requested By	Requisition Date	Requisition Amount	Cu
REQ-0000000754	Draft	1. Purchase Requisition	Anthony Joseph Knezevic	2020-11-16	4.17	C\$
REQ-0000000525	In Progress	3. Paid by Credit Card	Anthony Joseph Knezevic	2020-11-10	74.87	US

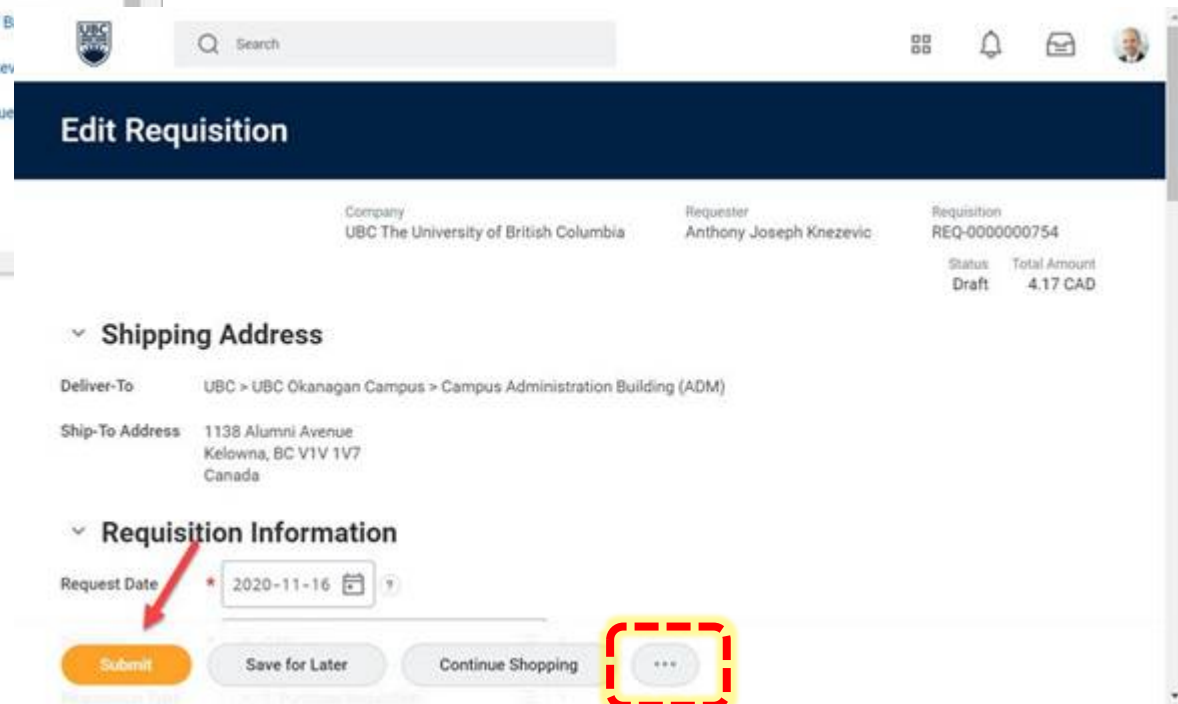
Click on desired Requisition link
(REQ -0000....)

SELECT ACTION & EDIT

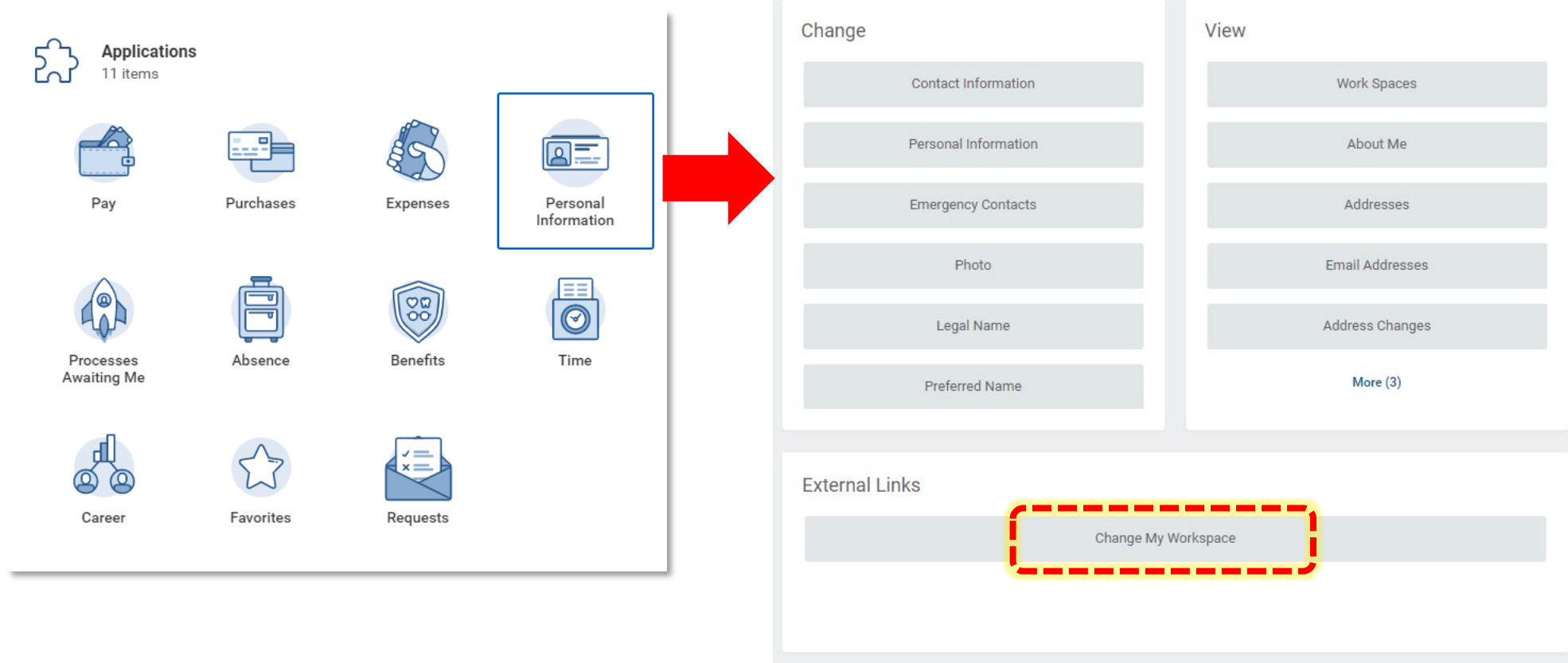


1. Select “**ACTIONS**” at top menu bar next to REQ #
2. Select “**Requisition**” from the Actions menu list displayed
3. Select “**Edit**”

1. Confirm details are correct; edit as needed
2. Click **Submit**



HOW TO CHANGE YOUR WORKSPACE (OFFICE & DELIVER-TO)





THE UNIVERSITY OF BRITISH COLUMBIA
Information Technology

