Finding A Purchase Order

In Workday, there are often multiple ways to access information. For Purchase Orders, there are four main ways to access: 1) Search for PO Number 2) Search through My Requisitions 3) Search by Find Departmental Purchase Order *or* 4) Search through Supplier Profile

Method One – Search for PO Number

If you know the Purchase Order number, search it directly in Workday.

1. In the Workday search bar, enter the PO number. Ex: PO-0018486

You may initially receive no results, if so, try clicking "More Categories".

≡ MENU	Simmons UNIVERSITY	Q P0-0018486	\odot
📮 Sav	ed Categories 🛛 🗸		
Peo	ole O		
Tasi	s and Reports 0		
i Mor	e Categories >		
		No results for "PO-0018486"	
		No results for PO-0010400	
		Try searching:	

2. Click on the PO number to open.

≡ м	ENU Simmons	S Y	Q P0-0018486 ③
Д	Saved Categories People Tasks and Reports	• •	Procurement P0-0018486 Purchase Order Simmons College Company - P0-0018486 - 07/13/2023 12:25:43.000 PM
=	More Categories	~	Purchase Order Printing Run
	Recruiting	0	
	Staffing	0	
	Projects	0	
	Assets	0	
	Expenses	0	

Method Two - From My Requisitions

If you created the requisition, the PO can be accessed through My Requisitions.

- 1. Enter "My Requisitions" in the search bar and select the My Requisitions report.
- 2. In the pop-up window:
 - a. <u>Required</u>: Make sure "Exclude Closed" is NOT checked.

Note: A closed status on a requisition does not mean the service has been completed, rather it means the requisition has been successfully converted into a Purchase Order so the requisition itself is no longer needed and has been closed by Purchasing.

- b. <u>Required</u>: Adjust the Document Date On or After to narrow or widen your search. The Document Date is the date you entered the *requisition*. Enter July 1st to bring up all requisitions you have entered for the current fiscal year.
- c. Optional: Adjust other fields to further narrow your search if desired.

My Requisitions			4
Company	× Simmons College Company …	:=	1
Requisition			I
Status		\equiv	I
Requisition Type		≔	I
Requesting Inventory Site		:=	I
Document Date On or After	86/19/2023 🖬		I
Document Date On or Before	ММ/DD/YYYY		I
Supplier		:=	I
Spend Category		:=	I
Item		\equiv	I
Project		:=	I
Purchase Order		:=	I
Exclude Canceled			I
Exclude Closed			
Include Job Requisitions			
Results in Requisitions Worklet			
OK Cancel			

Click OK

3. The resulting screen will populate all requisitions you've created that fall within your search parameters. For any requisition that was fully approved and converted into a PO, the purchase order will be listed in the Purchase Order column. Click the related PO number to open the PO.

My Requi	sitions 🙀										
Create Requ	isition										
 Selection 	n Criteria										
Company	Simmons College	Company									
Document Date (On or After 07/01/2022										
Exclude Cancele	d Yes										
 Procure 	ment Requisitions										
9 items							\frown				⁄≣ ≂ ₀₀ ⊡ ⊾' ⊞ ⊞
Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders	Request Status	Memo to Suppliers	Internal Memo	Edit Requisition
PR-0009090	Standard Purchase Orders		07/16/2023	20.00	USD	Kainos Test Supplier	P0-0018526	Successfully Completed			
PR-0009084	Capital Purchase Orders		07/16/2023	20.00	USD			Draft			(Edit Requisition)
PR-0009064	Blanket Purchase Orders		07/12/2023	2,000.00	USD	Valley Green Shredding, LLC		In Progress		Estimated FY total based on FY23 P0-0017864more	Edit Requisition



Method Three – Find Department Purchase Orders

Whether or not you created the requisition, you may be able to find the PO by searching by cost center. **Note**: Access may be limited based on the individual users' Workday roles

1. Enter "Find Department Purchase Order" in the Workday search bar.

≡ MENU	Simmons UNIVERSITY		Q find department purchase order
∏ Sav	ed Categories	\checkmark	Tasks and Reports
Peo Tasi	ple is and Reports	0	Find Department Purchase Order Report
i≡ Mor	More Categories >		Find Purchase Order Lines for Organizations Report Find Purchase Order Line and Line Splits for Organization 📼
			Report

2. In the pop-up window, enter or select the cost center related to the purchase order you are searching for. Click OK.



3. The resulting screen will bring up all POs entered for this cost center. Click the PO number to open.

Find Department Purchase Order 🚥 🏥

To narrow your results, click the column headings and use the filters. Ex: sort by amount, narrow to "issued" POs only, or select a specific supplier name

Purchase Order	Document Date	Purchase Order Status	Supplier from Purchase Order	Quantity	Amount	Requisition Line	Receipt for PO Line	Supplier Invoice Line
PO-0018616	08/03/2023	Issued	MASCO Services, Inc.	0	<u>L</u>	PR-0009161		
PO-0018618	08/03/2023	Issued	Boston Gas Company	0		PR-0009131		
PO-0018619	08/03/2023	Issued	Boston Water and Sewer Commission	0		PR-0009132		
PO-0018619	08/03/2023	Issued	Boston Water and Sewer Commission	0		PR-0009132		
PO-0018598	08/02/2023	Issued	John's Sewer and Pipe Cleaning, Inc.	0	£.	PR-0009102		
PO-0018599	08/02/2023	Issued	Constellation NewEnergy, Inc.	0	Aug 1	PR-0009125		Supplier Invoice: SN-0039057 -

Method Four – Search by Supplier Profile

Whether or not you created the requisition, but know the supplier, you can search for POs through the supplier profile. **Note:** Access may be limited based on the individual users' Workday roles

- 1. Enter "Find Suppliers" in Workday search bar.
- 2. In the pop-up window, enter the full or partial supplier name in the Supplier field. Check the box for the correct supplier, then click OK.

Find Suppliers			×
Supplier	× The R D Connors Corp	:=	
	Search		
Supplier Name	Search Results	(1)	
Supplier ID	The R D Connors Corp.		
Supplier Status		:=	
Supplier Category		:=	

3. Open the supplier profile, by clicking the magnifying glass on the far left.

Supplier	The R D Connors Corp.	IRS 1099	Supplier N	0							_
i item									×II =		
Supplier	Supplier Name	Supplier ID	Supplier Status	Supplier Category	Supplier Group	Customer Account Number	DUNS Number	Alternate Name	Supplier Contacts	Parent Supplier	-
۹	The R D Connors Corp.	S-0000706	Active	R	Small Business WBE - Women Business Entity						

4. Navigate to the purchase orders by clicking the "Contract and Purchase Orders" tab, then select "Purchase Orders" to see available POs. Click the magnifying glass on the far left next to open the PO you want to access.

The	e R D C	connors Cor	<u>p.</u> 🚥 :	Supplier									
Supş Appı Bala	plier ID roval Stat ince Due	S-0000706 us Approved 3,208.50			Address	18 400 W Cummings Park, Suite 1725-112 图 +1 (617) 5938945 Woburn, MA 01801 United States of America							
C	Overview Contracts and Purchase Orders Invoices and Payments Supplier Connections Tax Information Questionnaire Responses Custom Reports Change History Process History Procurement Setup Contracts Purchase Orders Purc												
R	Recent Purchase Orders 9 items												י 🎟 🎟
	Purchase Order	Number	Version	Company	Purchase Order Type	Status	Issue Option	Buyer	Supplier	Document Date	Due Date	Amount	Currenc
	۹	PO-0018601		Simmons College Company		Issued	Print	Anastasia Thrush	The R D Connors Corp.	08/02/2023			USD
	٩	PO-0018473		Simmons College Company		Issued	Print	Anastasia Thrush	The R D Connors Corp.	07/13/2023			USD
	٩	PO-0018474		Simmons College Company		Issued	Print	Anastasia Thrush	The R D Connors Corp.	07/13/2023			USD
	٩	PO-0018359		Simmons College Company		Closed	Print	Kelly Williams	The R D Connors Corp.	05/22/2023		XX	USD
	Q	PO-0018316		Simmons College Company		Closed	Print	Anastasia Thrush	The R D Connors Corp.	05/09/2023			USD
	٩	PO-0017725		Simmons College Company		Closed	Print	Anastasia Thrush	The R D Connors Corp.	11/01/2022			USD
	٩	P0-0017705		Simmons College Company		Closed	Print	Anastasia Thrush	The R D Connors Corp.	10/27/2022		XX	USD