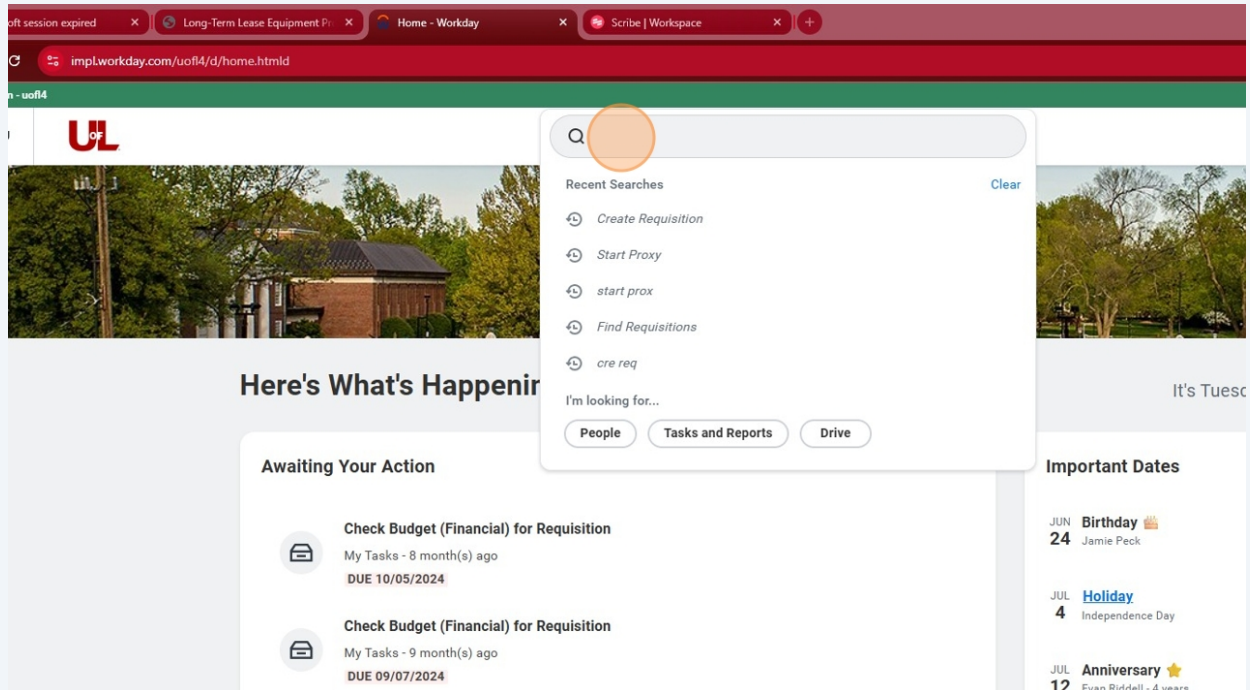


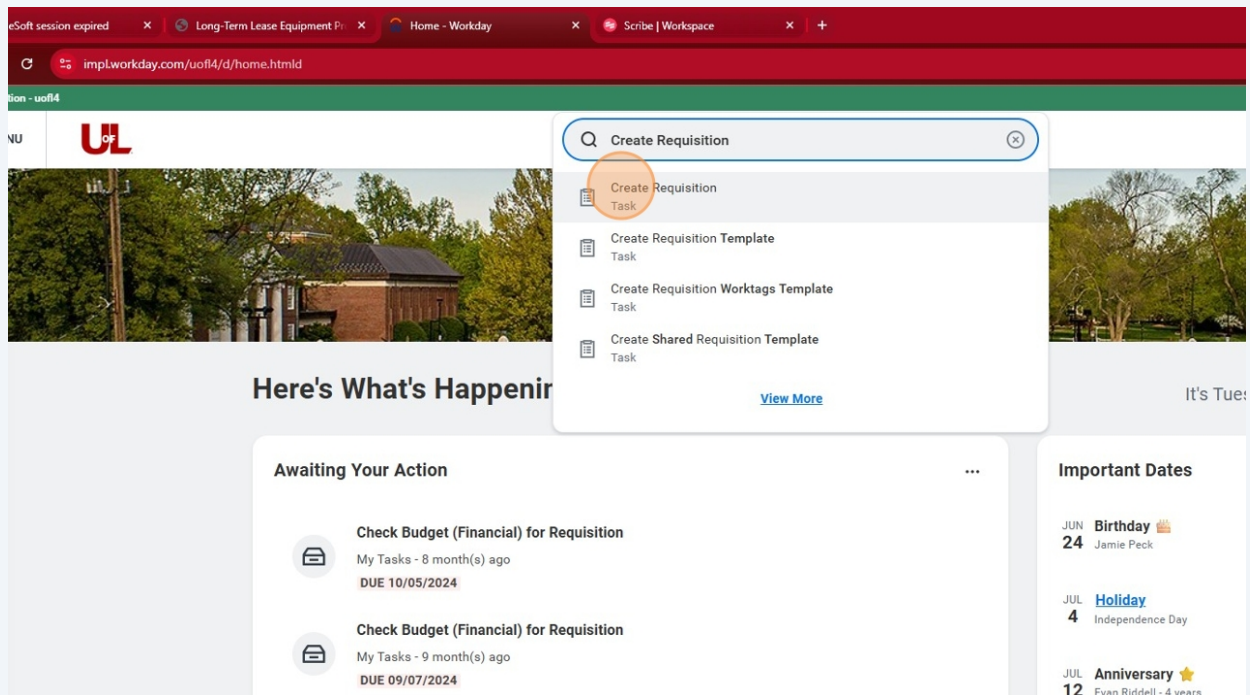
# Scribe for windows Workflow

1

From the Workday Home screen enter "Create Requisition" in the search bar. Workday is text intuitive so if you enter "Cre Req" it will show you all options available that include that sequence and can be selected from the list.



## 2 Click the "Create Requisition" task



## 3 Click "Requisition Type" to select the requisition type needed.

The screenshot shows the 'Create Requisition' form. The form has a red header bar with the title 'Create Requisition'. Below the header, there are several fields for requisition details. The 'Requisition Type' field is highlighted with an orange circle. The other fields include 'Requester' (Amber Horn), 'Requesting Entity', 'Company' (ULSA University of Louisville), 'Currency' (USD), 'Deliver-To' (Belknap Campus), 'Ship-To' (2215 S Brook Street Room 223, Louisville, KY 40292 United States of America), 'Program', 'Project', 'Gift', and 'Grant'.

#### 4 Click "Standard Purchase" requisition for punchout orders.

**Create Requisition**

Requester \* X Amber Horn ...

Requesting Entity

Company \* X ULSA University of Louisville ...

Currency \* X USD ...

Requisition Type \* Search ...

Deliver-To \* ☐ Owner Supplied Materials  
☐ Standard Purchase  
☐ Tie-To Requisition (Update Existing PO)

Ship-To \* States of America

Program

Project

Gift

Grant

Cost Center X CC000110 CAPS ...

Fund X FD01 General Operating

#### 5 The Deliver-To field auto populates with "Belknap Campus". Press the X to delete this and search for the correct Deliver-To.

**Create Requisition**

Requester \* X Amber Horn ...

Requesting Entity

Company \* X ULSA University of Louisville ...

Currency \* X USD ...

Requisition Type \* X Standard Purchase

Deliver-To \* X Belknap Campus ...

Ship-To \* 2215 S Brook Street Room 223  
X Louisville, KY 40292 United States of America

Program

Project

Gift

Grant

Cost Center X CC000110 CAPS ...

Fund X FD01 General Operating

6

If you are unsure of the location details, enter part of the building name (i.e. serv for Service Complex) and hit Enter to find the building. All locations with Service in the building name will appear so the correct building and room can be located.

The screenshot shows a requisition form with the following fields and values:

- Requester:** Amber Horn
- Requesting Entity:** (empty)
- Company:** ULSA University of Louisville
- Currency:** USD
- Requisition Type:** Standard Purchase
- Deliver-To:** serv
- Ship-To:** Search Results (20+)
  - ☒ Belknap Campus > Grounds Services (Belknap) > Room 100 (Grounds Services - Belknap)
  - ☐ Belknap Campus > Grounds Services (Belknap) > Room 101 (Grounds Services - Belknap)
  - ☐ Belknap Campus > Grounds Services (Belknap) > Room 103 (Grounds Services - Belknap)
  - ☐ Belknap Campus > Grounds Services (Belknap) > Room 104 (Grounds Services - Belknap)
  - ☐ Belknap Campus > Grounds Services (Belknap) > Room 105 (Grounds Services - Belknap)
- Program:** (empty)
- Project:** (empty)
- Gift:** (empty)
- Grant:** (empty)
- Cost Center:** (empty)
- Fund:** (empty)

Buttons: OK, Cancel

7

Enter Workday "PPGG" worktag to populate funding information.

The screenshot shows the same requisition form as in step 6, but with the following changes:

- Deliver-To:** Belknap Campus > Grounds Services (Belknap) > Room 103 (Grounds Services - Belknap)
- Ship-To:** 1704 S. Floyd Street Grounds Services LOUISVILLE, KY 40208 United States of America
- Program:** (highlighted with an orange circle)
- Project:** (empty)
- Gift:** (empty)
- Grant:** (empty)
- Cost Center:** CC000110 CAPS

Buttons: OK, Cancel

8

If "PPGG" worktag is unknown, enter part of the department name (i.e. purch for Purchasing). Select the appropriate worktag from the dropdown.

The screenshot shows a procurement form with the following fields and values:

- Requester**: \* x Amber Horn
- Requesting Entity**:
- Company**: \* x ULSA University of Louisville
- Currency**: \* x USD
- Requisition Type**: \* x Standard Purchase
- Deliver-To**: \* Belknep Campus > Grounds Services (Belknep) > Room 103 (Grounds Services - Belknep)
- Ship-To**: \* Search Results (2)
  - ☐ PG00080 Purchasing Office
  - ☐ PG02542 Purchasing - HSC
- Program**: purch
- Project**:
- Gift**:
- Grant**:
- Cost Center**: x CC000110 CAPS

Buttons: OK, Cancel

9

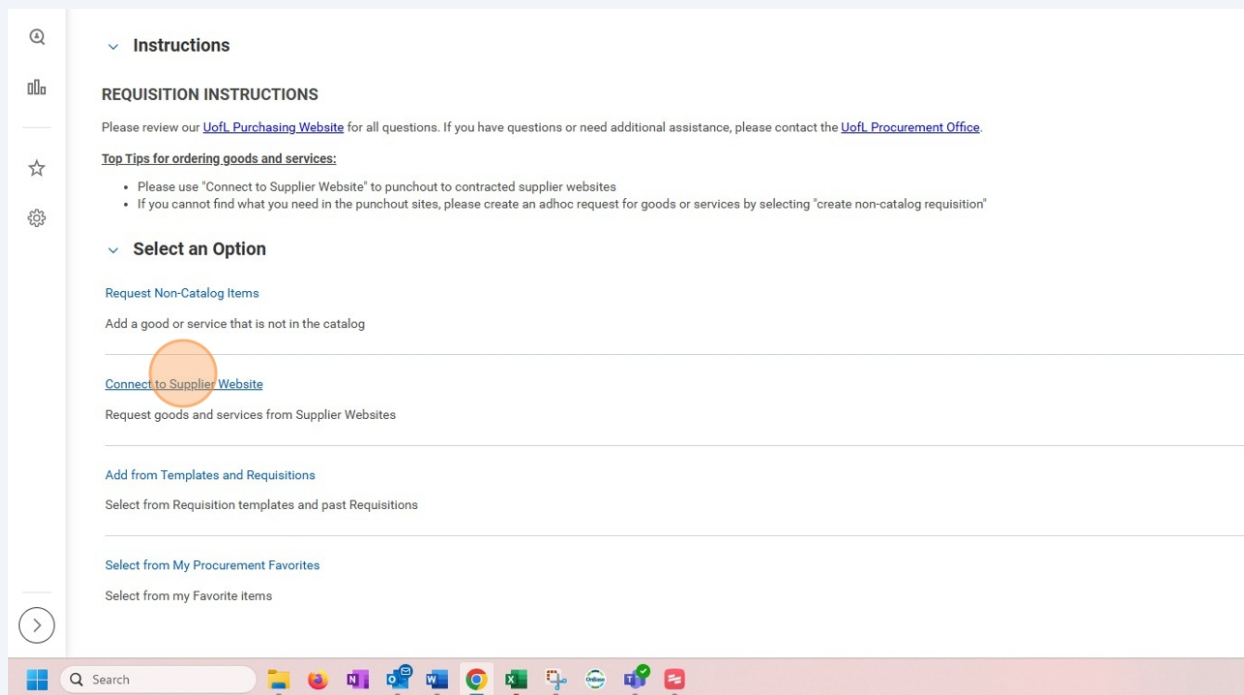
Funding details associated with the chosen worktag will auto-populate. These should not need to be changed but confirm that the worktags are correct. Click "OK"

The screenshot shows the same procurement form with the following fields and values:

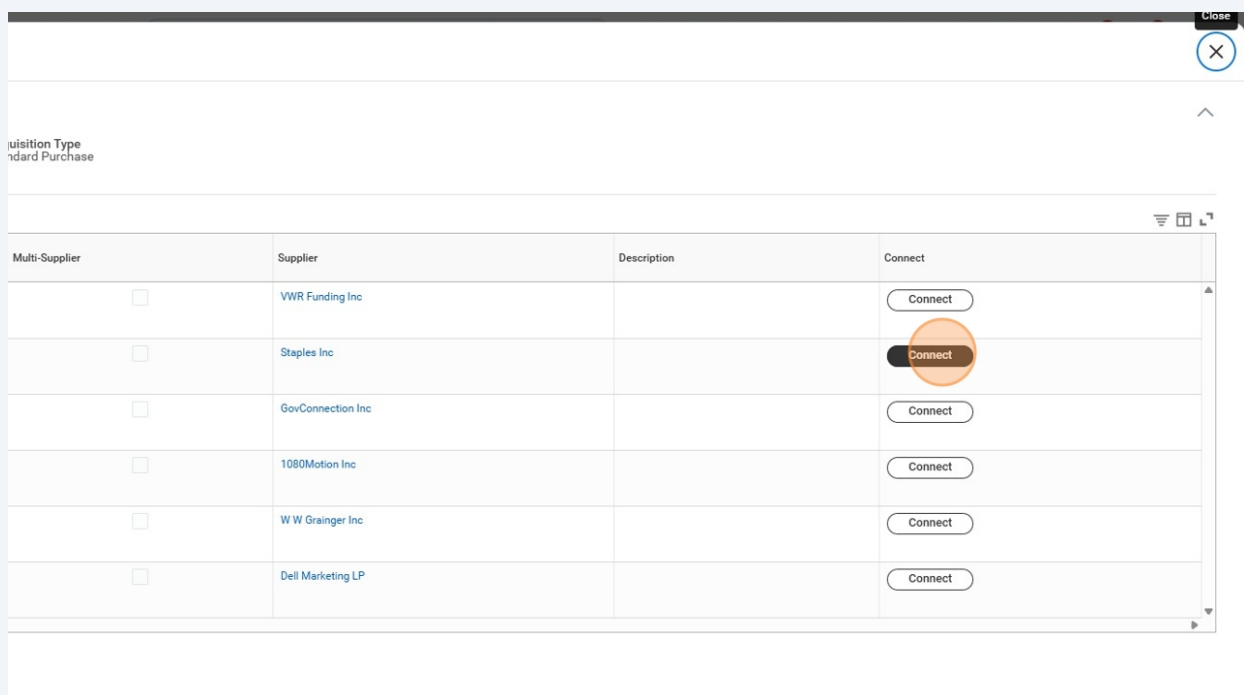
- Deliver-To**: \* Belknep Campus > Grounds Services (Belknep) > Room 103 (Grounds Services - Belknep)
- Ship-To**: \* 1704 S. Floyd Street Grounds Services LOUISVILLE, KY 40208 United States of America
- Program**: x PG00080 Purchasing Office
- Project**:
- Gift**:
- Grant**:
- Cost Center**: x CC000110 CAPS
- Fund**: x FD01 General Operating
- Function**: x FN06 Institutional Support
- Activity**:
- Additional Worktags**:

Buttons: OK, Cancel

## 10 Click "Connect to Supplier Website "



## 11 Click "Connect" next to the Staples, Inc.



## 12 The Staples Advantage ordering site will appear.

The screenshot shows a web browser with multiple tabs. The active tab is 'ac-order.staplesadvantage.com'. The address bar shows the URL 'ac-order.staplesadvantage.com/gus/sba/profileinfo/account/zipcode?'. The page has a red header with the 'Staples Business' logo. The main content area is titled 'Delivery ZIP code' and contains the following text: 'Please enter the ZIP Code of your delivery location so we can provide accurate product availability.' and 'For international orders, please enter '00000''. Below this is a text input field with the placeholder 'ZIP code' and 'Enter 5 digit ZIP code'. An orange circle highlights the input field. Below the input field is a red 'Continue' button. At the bottom of the page, there is a 'Solutions' section with links to 'Furniture', 'Print & Marketing', 'Technology', 'Facility', and 'Breakroom'.

PeopleSoft session expired x Long-Term Lease Equipment Pr x ac-order.staplesadvantage.com x Scribe | Workspace x +

ac-order.staplesadvantage.com/gus/sba/profileinfo/account/zipcode?

Staples Business

### Delivery ZIP code

Please enter the ZIP Code of your delivery location so we can provide accurate product availability.

For international orders, please enter '00000'.

ZIP code

Continue

Please note the estimations provided are based off the ZIP code entered, the SKU searched, and the day and time. Our inventories are constantly changing so if any of these variables change then the estimates may no longer be accurate.

#### Solutions

- Furniture
- Print & Marketing
- Technology
- Facility
- Breakroom

## 13 Enter delivery zip code and select "Continue".

The screenshot shows the same web browser as in step 12. The active tab is 'ac-order.staplesadvantage.com'. The address bar shows the URL 'ac-order.staplesadvantage.com/gus/sba/profileinfo/account/zipcode?'. The page has a red header with the 'Staples Business' logo. The main content area is titled 'Delivery ZIP code' and contains the following text: 'Please enter the ZIP Code of your delivery location so we can provide accurate product availability.' and 'For international orders, please enter '00000''. Below this is a text input field with the placeholder 'ZIP code' and '40208'. An orange circle highlights the 'Continue' button. Below the input field is a red 'Continue' button. At the bottom of the page, there is a 'Chat Now' window with the text 'Dariyen M. Still have some questions before completing your purchase? My name is'.

ac-order.staplesadvantage.com/gus/sba/profileinfo/account/zipcode?

Staples Business

### Delivery ZIP code

Please enter the ZIP Code of your delivery location so we can provide accurate product availability.

For international orders, please enter '00000'.

ZIP code

Continue

Please note the estimations provided are based off the ZIP code entered, the SKU searched, and the day and time. Our inventories are constantly changing so if any of these variables change then the estimates may no longer be accurate.

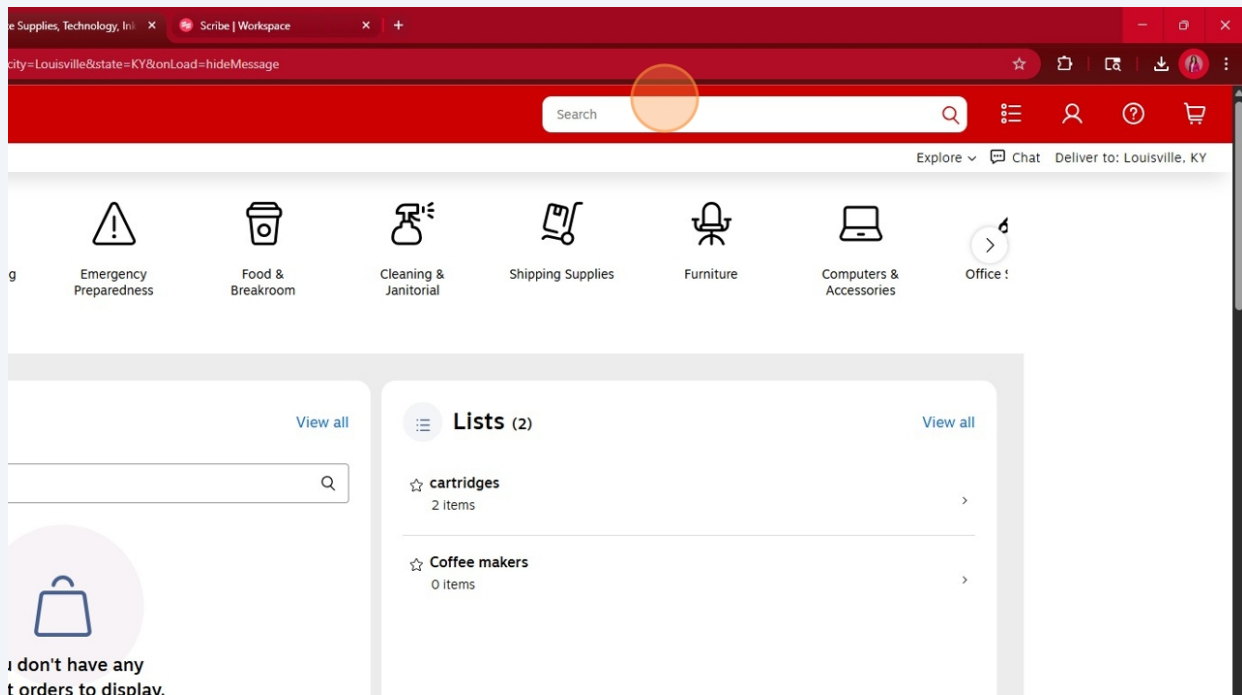
#### Chat Now

Dariyen M.  
Still have some questions before  
completing your purchase? My name is



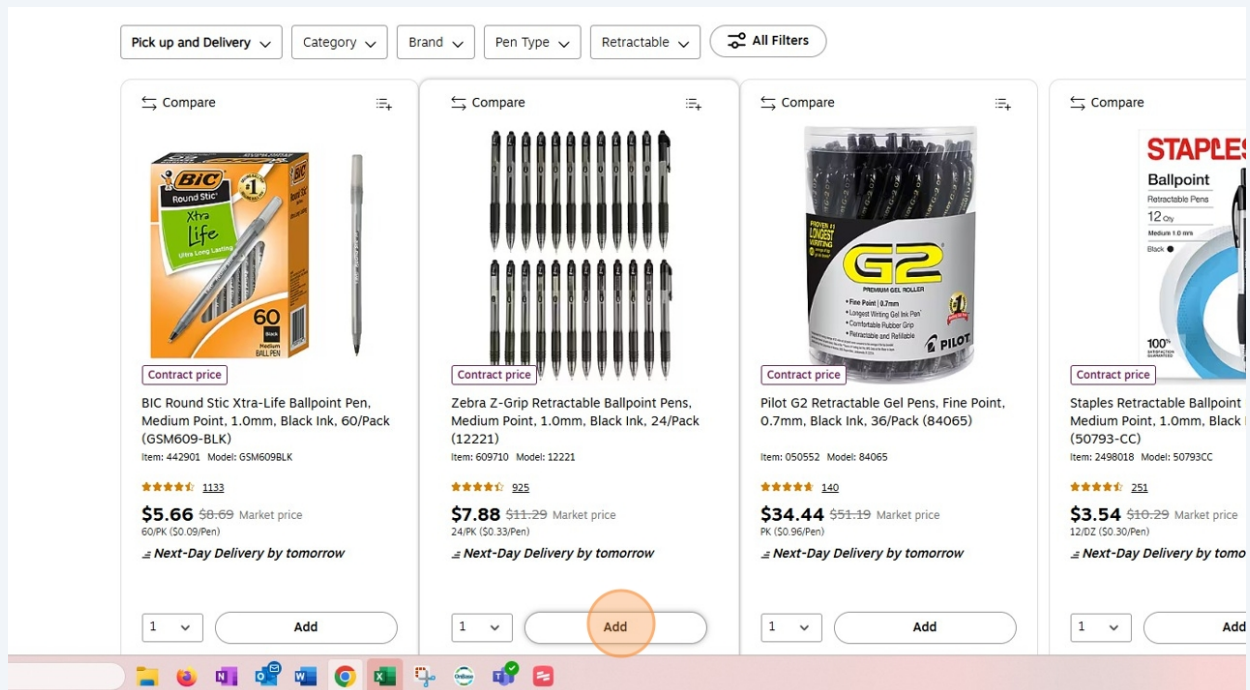
14

Click in the search bar to locate the items for purchase or use the icons to search all items in a category.



15

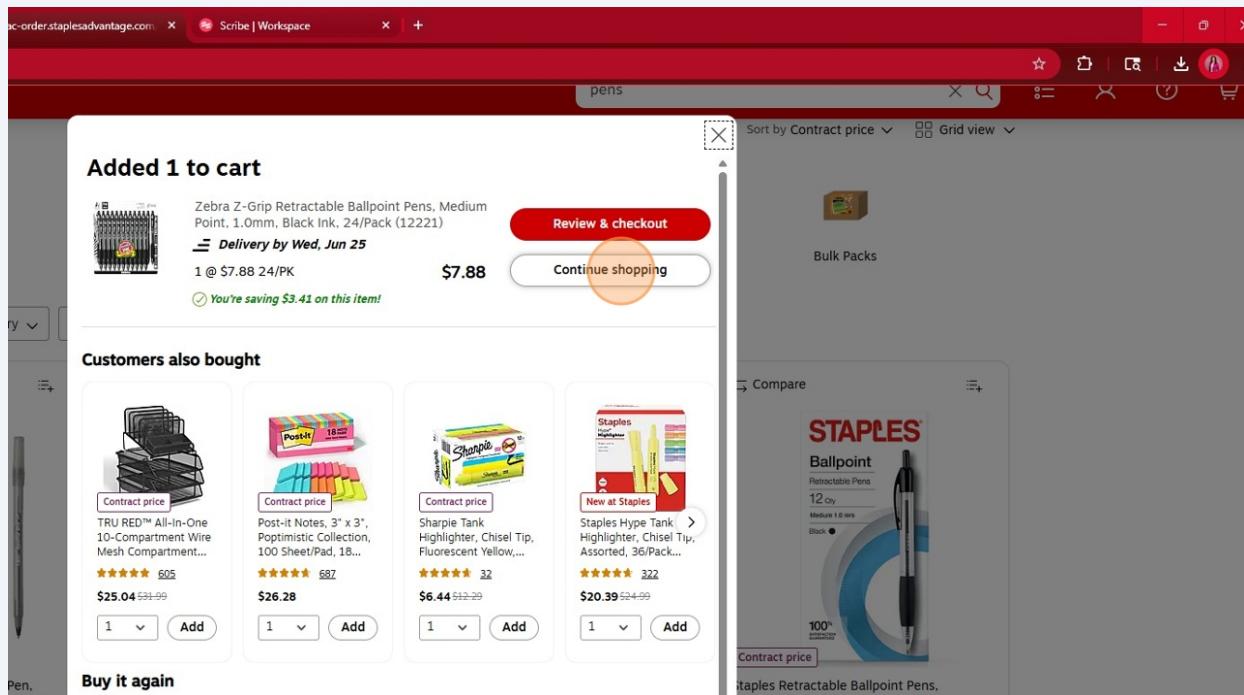
Click Add to select the item to add to cart.





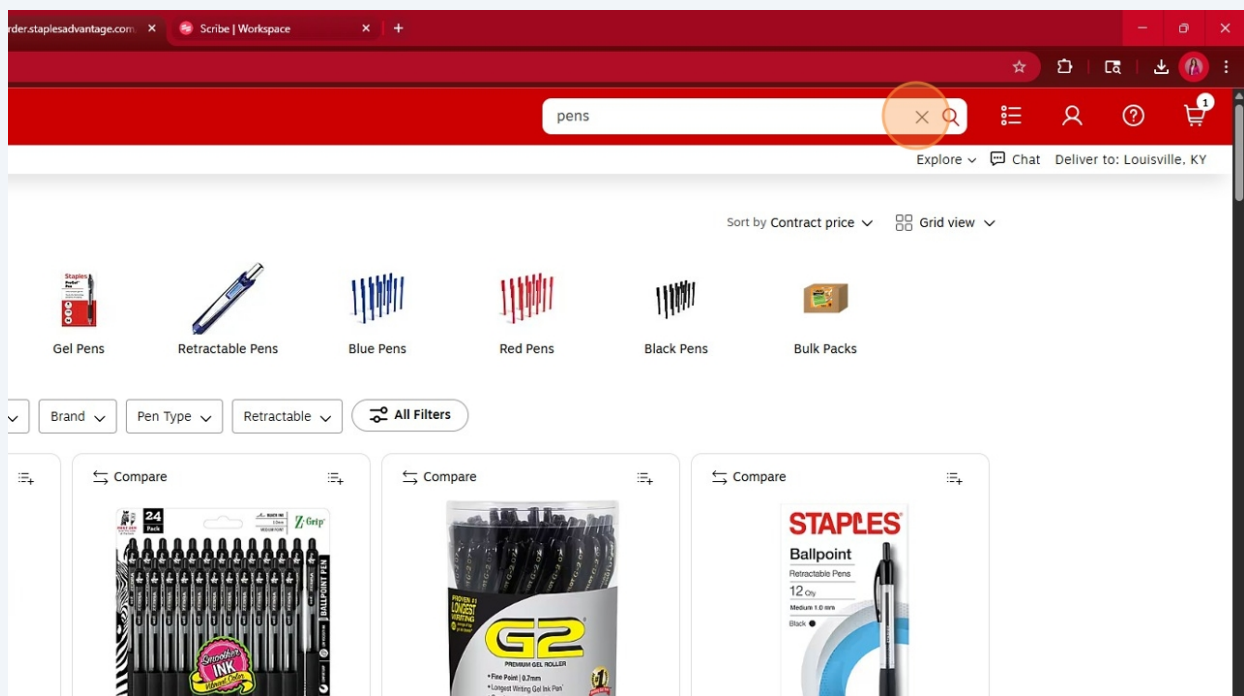
16

Click "Review & checkout" if shopping is complete. If there are more items to purchase, select "Continue Shopping".



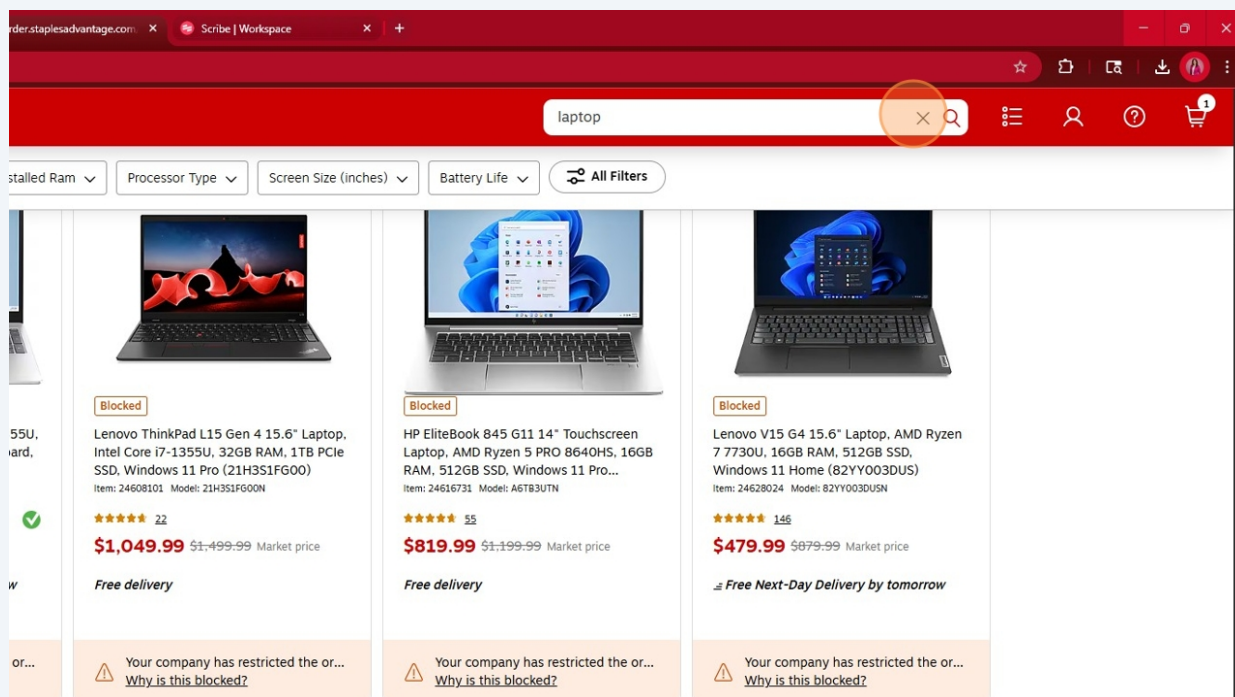
17

Delete information in search bar and enter the next item for purchase.



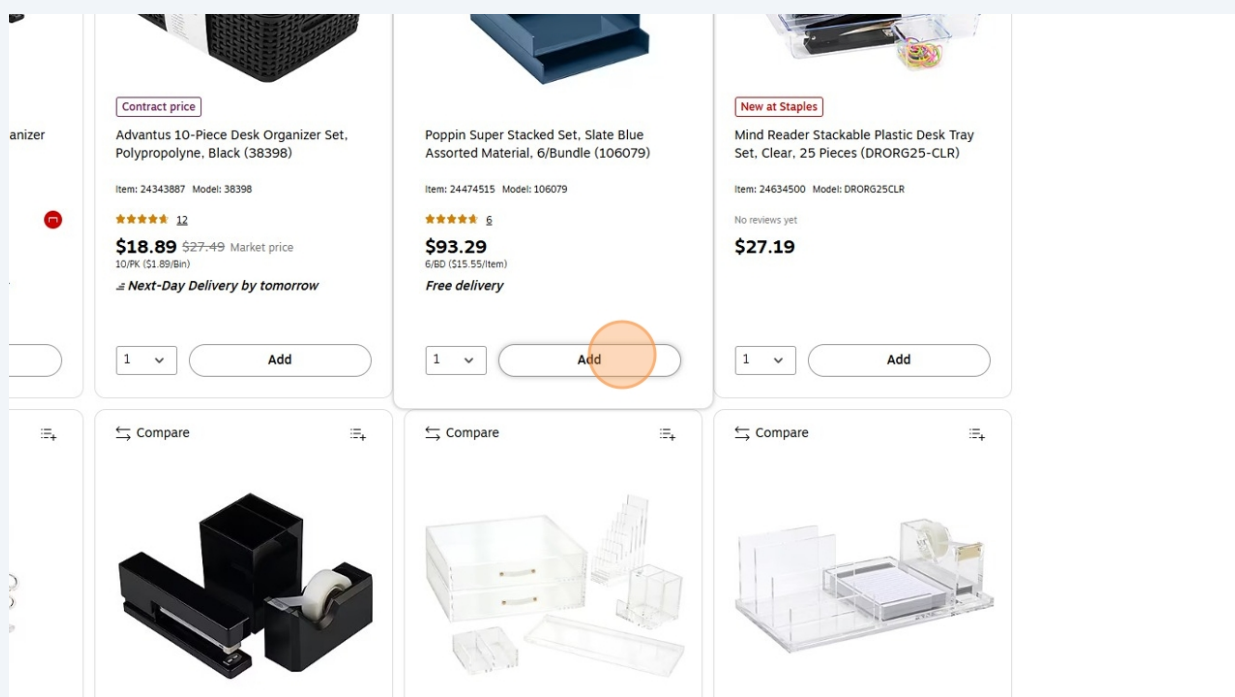
18

Some items will be restricted for purchase by University policies or procedures. Restricted items will have a notification that the item is Blocked and will not allow it to be added to the cart. To move forward with the purchase of a restricted item, you must contact the Staples representative or Procurement Services to request that the item be unblocked. If Procurement Services approves for the item to be unblocked, go back into the requisition to add it to the cart. Once the requisition is submitted you must let Procurement Services know to block the item again.

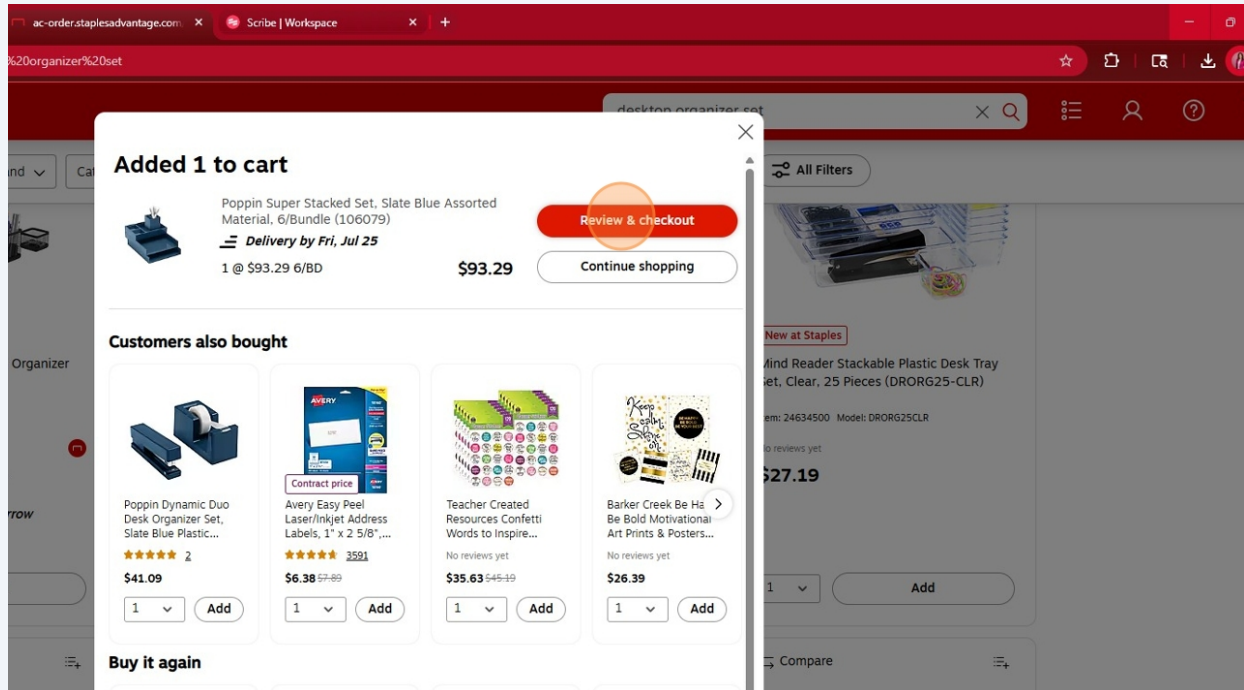


19

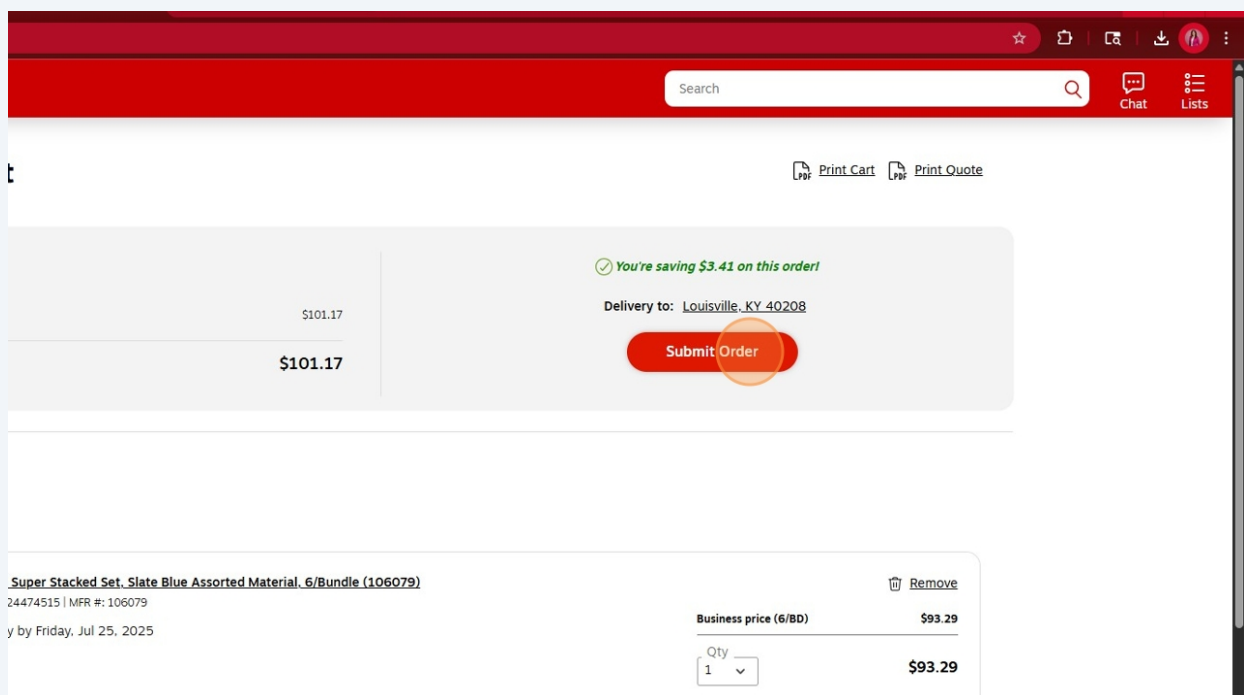
Continue adding items as needed.



20 When finished adding items, click "Review & checkout".



21 Review the cart to ensure all items were correctly added. Click "Submit Order"



22

By clicking "Submit Order" in the previous step, the order will automatically be transferred into the Workday Requisition.

The screenshot shows the Workday Requisition interface. At the top, there's a search bar and a notification bell icon with a red badge showing '5'. A modal dialog titled "Your Session Has Been Recovered" is displayed on the right, asking if the user wants to restore their last session. Below the dialog, the requisition details are visible:

Item Type	Total Amount	Currency
Standard Purchase	\$101.17	USD

The item details for "Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)" are listed below:

- Identifier: 609710
- Code: 44121704 - Ball point pens
- Category: Supplies - Office Supplies (SC0116)
- Supplier: Staples Inc
- Contract: (empty)
- Quantity: 1

23

All items should be transferred. Each item is listed separately on the left side. Review to ensure that items on all lines were added as requested.

The screenshot shows the Workday Requisition interface with a summary table at the top and item details on the left. The summary table includes:

Company	Requester	Requisition Type	Total Amount	Currency
ULSA University of Louisville	Amber Horn	Standard Purchase	\$101.17	USD

On the left, there's a list of items with a "Sort By" dropdown. The items are:

- Zebra Z-Grip Retractable Ballpoint P... (1 unit, \$7.88)
- Poppin Super Stacked Set, Slate Blu... (1 unit, \$93.29)

An orange circle highlights the "Poppin Super Stacked Set" item. On the right, the "Edit" section for the selected item shows the following details:

- Description: Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)
- Supplier Item Identifier: 609710
- Commodity Code: 44121704 - Ball point pens
- Spend Category: Supplies - Office Supplies (SC0116)
- Supplier: Staples Inc
- Supplier Contract: (empty)
- Quantity: 1
- Unit of Measure: Pack
- Unit Cost: 7.88
- Extended Amount: 7.88
- Memo: (empty text box)

At the bottom, there are "Checkout" and "Continue Shopping" buttons.

## 24 Click Checkout to move forward with order.

The screenshot shows a shopping cart interface. On the left, there is a sidebar with icons for search, list, favorites, and settings. The main area displays two items in the cart:

- Zebra Z-Grip Retractable Ballpoint P... \$7.88
- Poppin Super Stacked Set, Slate Blu... \$93.29

Below the items, there is a "Checkout" button highlighted with an orange circle, and a "Continue Shopping" button. To the right of the cart, there is an "Edit" section with the following details:

- Description: Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)
- Supplier Item Identifier: 609710
- Commodity Code: 44121704 - Ball point pens
- Spend Category: Supplies - Office Supplies (SC0116)
- Supplier: Staples Inc
- Supplier Contract: (empty)
- Quantity: 1
- Unit of Measure: Pack
- Unit Cost: 7.88
- Extended Amount: 7.88
- Memo: (empty text box)

At the bottom of the screen, there is a Windows taskbar with various application icons and a search bar.

## 25 A Memo to Supplier or Internal Memo can be added if desired but not necessary.

The screenshot shows a requisition form. At the top, it displays the location: "LUDLOWVILLE, NY 14200" and "United States of America". The form is divided into two main sections: "Requisition Information" and "Goods".

**Requisition Information**

- Request Date: 06/24/2025
- Currency: USD
- Credit Card: (empty)
- Requisition Type: Standard Purchase
- Sourcing Buyer: (empty)
- Submitted by: Amber Horn
- Memo to Suppliers: (empty text box, highlighted with an orange circle)
- Internal Memo: (empty text box)

**Goods**

Below the "Goods" section, there is a table with 2 items. The table has columns for Item, Price, Quantity, and Total. The first item is highlighted.

At the bottom of the form, there are three buttons: "Submit", "Save for Later", and "Continue Shopping".

26

Scroll down from screen in previous step. Review all details to ensure accuracy and completeness. All information should auto-populate but occasionally it won't. If there is any missing required information it will show an Error that must be fixed before moving forward.

Credit Card

Requisition Type \*

Sourcing Buyer

Submitted by Amber Horn

Memo to Suppliers

Internal Memo

▼ **Goods**

2 items

Order	Image	Company	Item	Item Description	Commodity Code	*Spend Category	*Q
<input type="text"/>		<input type="text" value="ULSA University of Louisville"/>		Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)	<input type="text" value="44121704 - Ball point pens"/>	<input type="text" value="Supplies - Office Supplies (SC0116)"/>	Qu 1 Un Pa
<input type="text"/>		<input type="text" value="ULSA University of Louisville"/>		Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)	<input type="text" value="44111503 - Desktop trays or organizers"/>	<input type="text" value="Supplies - Office Supplies (SC0116)"/>	Qu 1 Un Pa

27

In this example, the "Unit of Measure" is required but missing.

Item Description	Commodity Code	*Spend Category	*Quantity	Unit Cost
Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)	<input type="text" value="44121704 - Ball point pens"/>	<input type="text" value="Supplies - Office Supplies (SC0116)"/>	Quantity <span>*</span> 1 Unit of Measure <span>*</span> Pack	
Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)	<input type="text" value="44111503 - Desktop trays or organizers"/>	<input type="text" value="Supplies - Office Supplies (SC0116)"/>	Quantity <span>*</span> 1 Unit of Measure <span>*</span> <input type="text"/>	

...

2:12 PM  
6/24/2025



28

Click on the "Unit of Measure" field to open the options and select the appropriate one.

The screenshot shows a procurement system interface. A table lists items with columns for Item Description, Commodity Code, \*Spend Category, and Unit Cost. The 'Unit of Measure' field is highlighted, and a dropdown menu is open, showing options like Bottle, Box, Bundle, Can, Card, Carton, Case, Centimeter, Container, Day, Dozen, Each, Fifty, and Five Hundred. The 'Each' option is selected. The table contains two items: 'Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)' and 'Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)'. The interface includes a search bar, a scroll bar, and a taskbar at the bottom with various application icons and a system clock showing 2:12 PM on 6/24/2025.

Item Description	Commodity Code	*Spend Category	Unit Cost
Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)	44121704 - Ball point pens	Supplies - Office Supplies (SC0116)	
Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)	44111503 - Desktop trays or organizers	Supplies - Office Supplies (SC0116)	

29

Use the scroll bar beneath the lines to scroll to the right and verify the details.

The screenshot shows a procurement system interface with a table of items. The table has columns for Order, Image, Company, Item, Item Description, Commodity Code, \*Spend Category, and \*Quantity. The 'Goods' section shows two items: 'Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)' and 'Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)'. The 'Services' section is empty. A scroll bar is visible at the bottom of the table, and an orange circle highlights it. The interface includes a search bar, a scroll bar, and a taskbar at the bottom with various application icons and a system clock showing 2:12 PM on 6/24/2025.

Order	Image	Company	Item	Item Description	Commodity Code	*Spend Category	*Quantity
1		ULSA University of Louisville		Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)	44121704 - Ball point pens	Supplies - Office Supplies (SC0116)	1
1		ULSA University of Louisville		Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)	44111503 - Desktop trays or organizers	Supplies - Office Supplies (SC0116)	1



30

Once all information is completed and verified, click "Submit" to submit the requisition order. A requisition will be auto-generated as seen in the next step.

**Goods**

2 items

Order	Image	Company	Item	Item Description	Commodity Code	*Spend Category	*Q
(+)(-)		ULSA University of Louisville		Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/Pack (12221)	44121704 - Ball point pens	Supplies - Office Supplies (SC0116)	Qu 1 Un Pa
(+)(-)		ULSA University of Louisville		Poppin Super Stacked Set, Slate Blue Assorted Material, 6/Bundle (106079)	44111503 - Desktop trays or organizers	Supplies - Office Supplies (SC0116)	Qu 1 Un Ea

**Services**

0 items

Order	Image	Company	Item	Description	*Spend Category	Extended Amount	Date
-------	-------	---------	------	-------------	-----------------	-----------------	------

**Submit** **Save for Later** **Continue Shopping** **...**

31

The requisition will automatically go through the workflow approvals. Click "Details and Process" to review any details or approval steps.

**You have submitted** Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD

**Up Next**

- Check Budget (Financial) for Requisition - Batch/Job: Run Budget Check

**Details and Process**

## 32 The Details tab will show the information that was submitted on the requisition.

For REQ-000000092

Overall Process Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD

Overall Status In Progress

**Details** Process

> Shipping Address

> Information

▼ Goods

2 items

Line	Image	Company	Item	Quantity	Unit of Measure	Unit Cost
1		ULSA University of Louisville	Item Item Description Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/ ...more Commodity Code 44121704 - Ball point pens Spend Category Supplies - Office Supplies (SC0116)	Requested 1	Pack	7.88

## 33 The "Process" tab

For REQ-000000092

Overall Process Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD

Overall Status In Progress

**Details** Process

> Shipping Address

> Information

▼ Goods

2 items

Line	Image	Company	Item	Quantity	Unit of Measure	Unit Cost
1		ULSA University of Louisville	Item Item Description Zebra Z-Grip Retractable Ballpoint Pens, Medium Point, 1.0mm, Black Ink, 24/ ...more Commodity Code 44121704 - Ball point pens Spend Category Supplies - Office Supplies (SC0116)	Requested 1	Pack	7.88

34

Click the "Process Tab" to see the workflow approval steps as shown in the next step.

Check Budget (Financial) for Requisition - Batch/Job: Run Budget Check

▼ **Details and Process**

For [REQ-000000092](#)

Overall Process [Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD](#)

Overall Status In Progress

Details **Process**

Process History 3 items

Process	Step	Status	Completed On	Due Date	Pers
<a href="#">Requisition Event</a>	Requisition Event	Step Completed	06/24/2025 02:12:36 PM		Amb
<a href="#">Check Budget (Financial)</a>	Check Budget (Financial)	Automatic Complete	06/24/2025 02:12:36 PM		
<a href="#">Check Budget (Financial)</a>	Batch/Job: Run Budget Check	Launched	06/24/2025 02:12:36 PM		

**Remaining Process**

Click on the button below to review remaining process details.

**Remaining Process**

Remaining Process

35

Click the hyperlink "Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD" to go back to view the requisition.

PeopleSoft session expired x Long-Term Lease Equipment P x View Remaining Process - Worl x Scribe | Workspace x +

implworkday.com/uofl4/d/inst/1365\$162/rel-task/2998\$21343.html

Implementation - uofl4

MENU **UL** Search

**View Remaining Process** [Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD](#)

Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD

Remaining Process 8 items

Process	Step	Group
<a href="#">Requisition Event</a>	Approval by Requisition Approver - Lab Animals	Requisition Approver - Lab Animals
<a href="#">Requisition Event</a>	Approval by Requisition Approver - Radioactive	Requisition Approver - Radioactive
<a href="#">Requisition Event</a>	Approval by Requisition Approver - Fabric	Requisition Approver - Fabric
<a href="#">Requisition Event</a>	Approval by Requisition Approver - Print	Requisition Approver - Print
<a href="#">Requisition Event</a>	Approval by Accounts Payable Operations Lead	Accounts Payable Operations Lead
<a href="#">Requisition Event</a>	Approval by Accounting Operations Lead	Accounting Operations Lead
<a href="#">Requisition Event</a>	Check Budget	Financial Budget Manager
<a href="#">Requisition Event</a>	Source Goods and Services Requisition	Spend Category Buyer

36

Click "Process" tab to view all steps remaining in the approval process. as shown in the next step.

Implementation - uofl4

MENU

UL

Search

**View Event** Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD

For REQ-000000092

Overall Process Requisition: REQ-000000092, Requester: Amber Horn, Date: 06/24/2025, Amount: 101.17 USD

Overall Status In Progress

Details Process

> Shipping Address

> Information

Goods

2 Items

Line	Image	Company	Item	Quantity	Unit of Measure	Unit Cost
1		ULSA University of Louisville	Item	Requested	Pack	7.88

37

After all approvals have been completed a purchase order will be generated and will be electronically delivered to Staples.

heck Budget (Financial)	Review Budget Check	Not Required		
heck Budget (Financial)	Override Budget Check	Not Required		
heck Budget (Financial)	Service: Reserve Budget in Budget Check	Step Completed	06/24/2025 02:12:40 PM	Workday Service
quisition Event	Approval by Buyer	Not Required		
quisition Event	Approval by Business Asset Accountant	Not Required		
quisition Event	Approval by Grant Manager	Not Required		
quisition Event	Approval by Gift Manager	Not Required		
quisition Event	Approval by Project Manager	Not Required		
quisition Event	Approval by Project Financial Approver	Awaiting Action		
quisition Event	Approval by Cost Center Manager	Awaiting Action		Michelle Comer (Cost Center Manager) ()
quisition Event	Approval by Program Manager	Awaiting Action		

**Remaining Process**

Click on the button below to review remaining process details.

Remaining Process