





Create, Change, and Amend Supplier Contracts

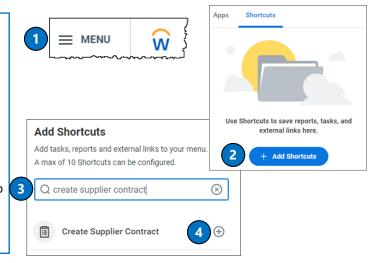
Once a contract is active in PEER, Contract Specialists will create a duplicate record of that contract in Workday. This is referred to as the **Contract Header**. Workday allows you to create a **Shortcut** for this function. Follow the steps below to create supplier contract Workday shortcut and create a general supplier contract.

CREATE SUPPLIER CONTRACT WORKDAY SHORTCUT

From your Workday homepage:

- 1. Select the Global Navigation Icon (Menu).
- 2. From the Shortcuts tab, select + Add Shortcuts.
- 3. Type Create Supplier Contract into the Search box.
- 4. Select the addition symbol (+) next to the shortcut to add it.

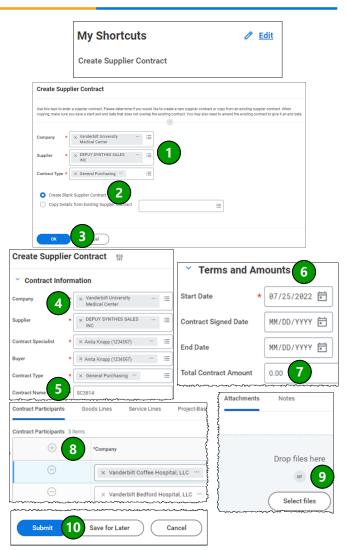
Note: The **Create Supplier Contract Report** will always show up under **Shortcuts** for your future use.



CREATE A GENERAL SUPPLIER CONTRACT

From **My Shortcuts**, select **Create Supplier Contract** (you can also type **create supplier contract** into the Search box).

- Type the appropriate Company, Supplier, and Contract Type into each field.
- 2. Select Create Blank Supplier Contract.
- 3. Select OK.
- 4. Under Contract Information, ensure that the Company, Supplier, Contract Specialist, Buyer, and Contract Type auto-populate based on previously input information.
- 5. In the **Contract Name** field, type the **PEER number,** followed by the **PEER title** (contract name).
- Under Terms and Amounts, input the correct contract Start Date and End Date (the Contract Signed Date is not required).
- If required, type the Total Contract Amount (see table on page 2 for contract types that do require a total contract amount).
- 8. Complete the **Contract Participants tab** by selecting the **addition (+) sign**, then typing the **Company** in the **Search** box.
- 9. Complete the **Attachments** tab by uploading the contract.
- 10. Select Submit.









Create, Change, and Amend Supplier Contracts

In Workday, Contract Specialists will use the Change Supplier Contract feature to fix an error on a contract. Contract Specialists will use the Amend Supplier Contract feature in Workday any time there is a new contractual document being memorialized. Follow the steps below to change a supplier contract or amend a supplier contract.

CONTRACTS THAT REQUIRE A TOTAL CONTRACT AMOUNT (refenced on page 1)

Consulting Service •

- Equipment Lease—Scheduled Invoice
- Membership Participation Agreement
- Staffing Agreements
- **General Purchasing**

- Real Estate Rent & Lease—Scheduled Invoice
- Vehicle Lease—Scheduled Invoice
- General Purchasing Associated with a Lease

Company

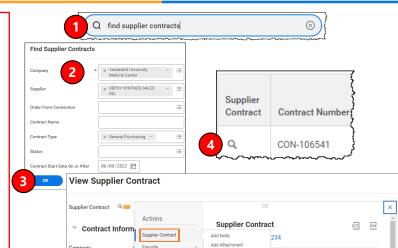
Supplier

- License SAAS—Manual Invoice
- Purchased Services—Manual Invoice
- **Equipment Purchase**
- **Equipment Rental**

CHANGE A SUPPLIER CONTRACT

From your Workday homepage:

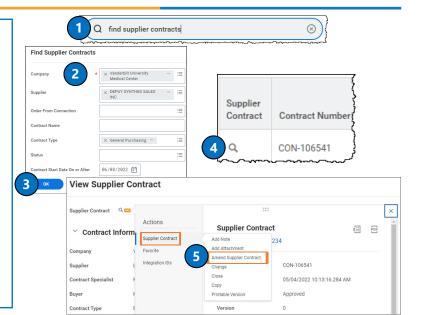
- 1. Type Find Supplier Contracts in the Search box.
- 2. In the Find Supplier Contracts pop-up window, input or filter the Company and any other applicable information to help you find the appropriate contract.
- 3. Select OK.
- 4. Select the magnifying glass icon next to the contract you wish to change.
- 5. From the contract, use the Related Actions button to select the Change tab.



AMEND A SUPPLIER CONTRACT

From your Workday homepage:

- 1. Type Find Supplier Contracts in the Search box.
- 2. In the Find Supplier Contracts pop-up window, input or filter the Company and any other applicable information to help you find the appropriate contract.
- 3. Select OK.
- 4. Select the magnifying glass icon next to the contract you wish to change.
- 5. From the contract, use the Related Actions button to select the Amend Supplier Contract tab.



QUESTIONS?

Please email BusinessEducation@vumc.org.

