February 2023

NEWSLETTER

CAHNRS Finance & Administration

CONTRACTS

Helpful Tip of the Month!

What is the difference between a Workday "Customer" and "Supplier" & why do I need to create one or the other, if they already exist in Workday? Workday has two separate portals, Customer or Supplier, and they cannot extract information from one designation to the other. Each must be created separately.

*A Workday "Customer" is usually paying revenue to WSU or may represent an entity that is part of a true "No Cost" Contract. Remember, if there is any contractual obligation to pay funds, even if it being paid by a "participant, lodger, or third party," it is not a "No Cost" Contract.

*A Workday "Supplier" is typically receiving payments for goods, services or facilities use and an external vendor.

As soon as you know you are going to request a contract with an individual or entity, take a moment to check in Workday to see if they are set up and active as a Customer or Supplier. Don't wait until you submit a CRF to see if they are in Workday, because this may hold up your processing time by days! Make note of their Workday number and insert it on your CRF. If you don't see them in Workday, you will want to create a new supplier, or a new customer based on the criteria for the role* they will hold in your contract.

If they are Inactive or in Hold status, check for a Workday notation. It might be a duplicate account or missing documentation. Usually, it means you will need to obtain a current W-9 or Tax Identification form (must be attached to Create New Supplier), contact information, legal name, address, phone, e-mail, and submit a Change Request for the Customer or Supplier.

Create Supplier Request: https://jira.esg.wsu.edu/servicedesk/customer/kb/view/156963633
Create Customer Request: https://jira.esg.wsu.edu/servicedesk/customer/kb/view/169156567

Still not sure which designation to use, feel free to reach out to us at contracts.bc@wsu.edu.

Thank you for all your hard work throughout our university system, our team is here for you!

TRAVEL

ANNOUNCEMENTS

- Check out our webpage for updated forms and information regarding travel in workday. https://business-center.cw.wsu.edu/travel/
- Updated travel tutorials coming soon starting March 2023
- Getting in the habit of checking on the status of your Spend Authorization (SA) or Expense Report (ER), is a great way to make sure it is not sent back and/or waiting for you to take action. You can use the following reports in Workday to find your SA or ER status, to come back to a draft you created or to edit, review, and approve: "My Spend Authorizations" and "My Expense Reports".
- Please feel free to reach out to us if you need help staying on top of your travel. We are more than happy to have you stop by Hulbert Hall 305 or via zoom.

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