# Goods as Ad-hoc (non-catalog) in UMarketplace

## Creating & Checking Status

*Before creating the requisition, contact the vendor for a quote. Request that a copy of the quote to be sent to you.*

### Begin Purchasing in Workday

1. Log into Workday and click the **Purchases** worklet.

2. Click **Connect to Supplier Website**.

3. Click **Connect**.

### Enter UMarketplace and Create an Ad-hoc (non-catalog) Cart

4. Click **Ad-hoc Item**.

5. Complete the Ad-hoc fields based on the first line item in the quote.

6. Finished adding items? Click **Save and Close**.
   OR
   To add more items, click **Save and Add Another**.
   OR
   To go back to Umarketplace click **Close**.

7. To review the cart click the shopping cart icon in the upper right corner.
8. Click View Cart Details.

9. To transfer the cart back to your Workday screen click Send to Workday. OR To send the cart to another UM employee for processing click Assign Cart. The selected individual will be responsible for finishing and submitting the requisition.

10. Review items in the cart and click Checkout.

11. The Checkout screens contain the following sections:
   - Shipping Address
   - Information (Requisition Type)
   - Attachments
   - Review and Submit
Shipping Address Tab
12. To change the ship to address, click the stacked lines icon and search for the correct address.

13. Check **Apply Ship-To Address Changes to All Lines**.
   Note, the **Use Alternate Address should be left blank**. To load an address into Workday, contact the Purchasing data team at 305-284-5751.

14. Click Next.

Information Tab
15. **Requisition Type** – Select **Goods**
16. Click **Next**.

Attachments Tab
17. Drag and drop the quote and attachments into the section **Drop files here** or click **Select files**.
18. Click **Next**.

Review and Submit Tab
19. Upon entering this screen, errors and alerts will appear. Once required fields are completed, the requisition can be submitted.
20. Complete the Spend Category (formerly sub object) field for each line item. Copy and paste for each line item.

21. Scroll to the right and complete the Worktag Driver: Program, Grant, Gift or Project. Copy and paste for each line item.

22. Click Submit. The current approver’s name will appear.
23. Click Done.

The FRS/FDM Conversion Tool may be useful for finding the Spend Category (formerly sub object code) and Driver Worktag. This is not compatible with Internet Explorer or mobile devices. To access the FRS/FDM Conversion Tool, please use either Microsoft Edge, Mozilla Firefox, Google Chrome, or Apple Safari. [http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html](http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html)

### Checking the Status of a Purchase Requisition

24. Click the Purchases worklet.

25. Click Requisitions.

26. Use the search filters to find the requisition. OR
   Click OK to see all requisitions within the designated date range.
27. Scroll down to the requisition and check the Request Status.

Spend Categories - Common (formerly “Sub Object Codes”)

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<th>Sub Object Codes and Descriptions</th>
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<tr>
<td>3218 Clerical Supplies</td>
<td>SC08218 Clerical Supplies</td>
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<td>3229 Copy / Pub /Print-Supplies</td>
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<td>3223 Equipment Supplies</td>
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<tr>
<td>3624 Entertain - FoodBevRec</td>
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<td>4268 Managed Equip Maintenance</td>
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<td>3227 Promotional Materials</td>
<td>SC08227 Promotional Materials</td>
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<td>3225 Technical Supplies</td>
<td>SC08225 Technical Supplies Other</td>
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