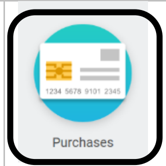
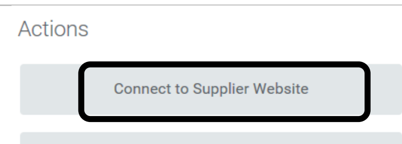
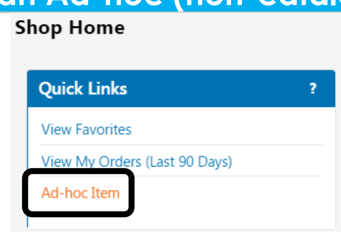
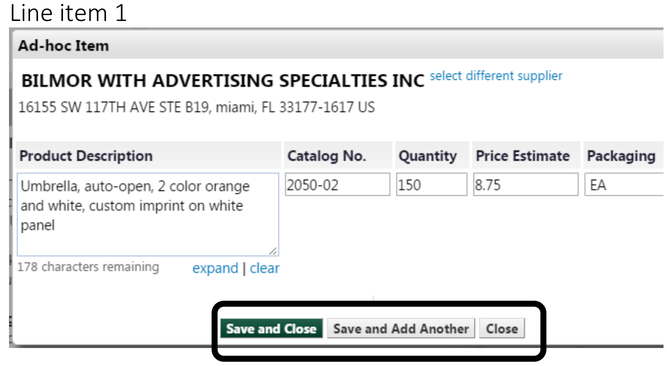
Goods as Ad-hoc (non-catalog) in UMarketplace

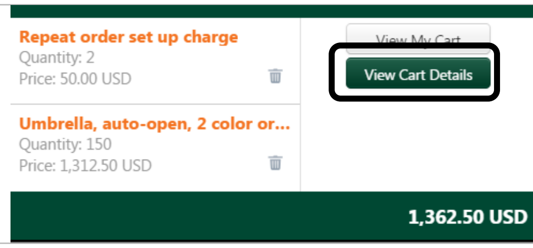
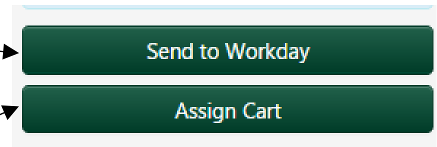
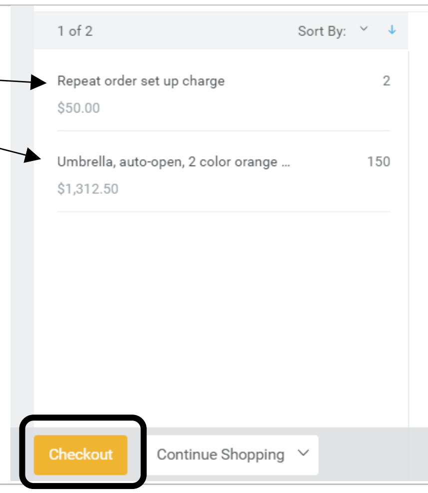
Creating & Checking Status

http://workday.miami.edu

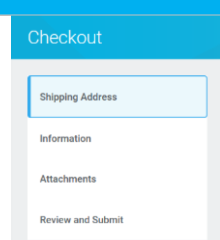
**Before creating the requisition, contact the vendor for a quote. Request that a copy of the quote to be sent to you.*

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**.	Line item 1 
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**.	

Checkout

11. The **Checkout** screens contain the following sections: • *Shipping Address* • *Information (Requisition Type)* • *Attachments* • *Review and Submit*	

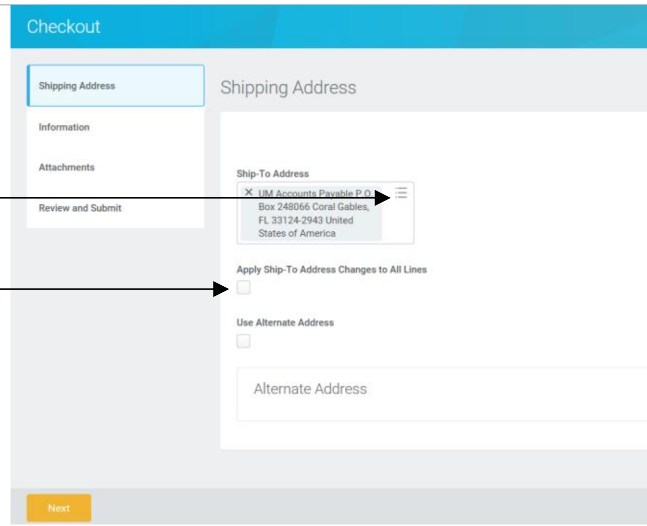
Shipping Address Tab

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.

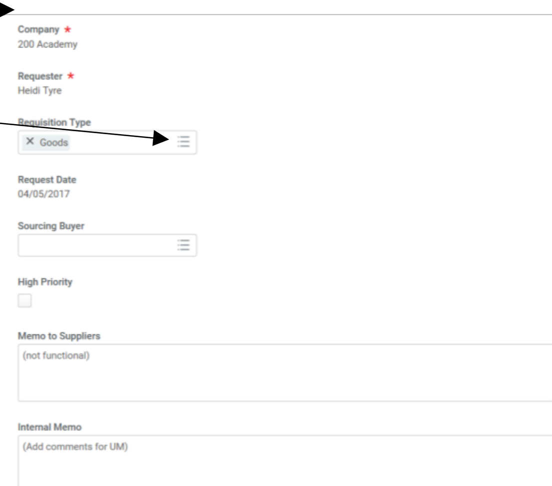
14. Click Next.



Information Tab

15. *Requisition Type* – Select **Goods**

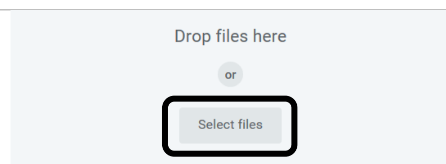
16. Click **Next.**



Attachments Tab

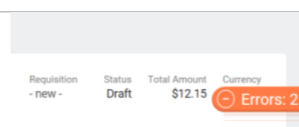
17. Drag and drop the quote and attachments into the section **Drop files here** or click **Select files.**

18. Click **Next.**

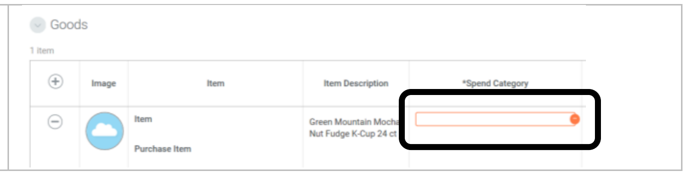


***Review and Submit* Tab**

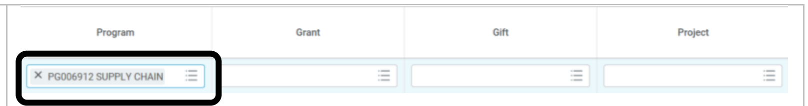
19. Upon entering this screen, errors and alerts will appear. Once required fields are completed, the requisition can be submitted.



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.

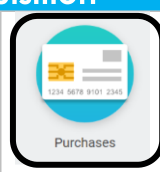


22. Click **Submit**. The current approver's name will appear.
23. Click **Done**.

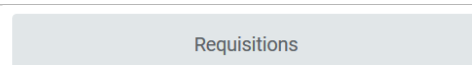
The FRS/FDM Conversion Tool may be useful for finding the Spend Category (formerly sub object code) and Driver Worktag. This is not compatible with Internet Explorer or mobile devices. To access the FRS/FDM Conversion Tool, please use either Microsoft Edge, Mozilla Firefox, Google Chrome, or Apple Safari.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

Checking the Status of a Purchase Requisition

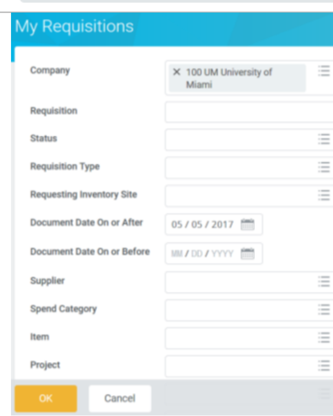
24. Click the **Purchases** worklet.



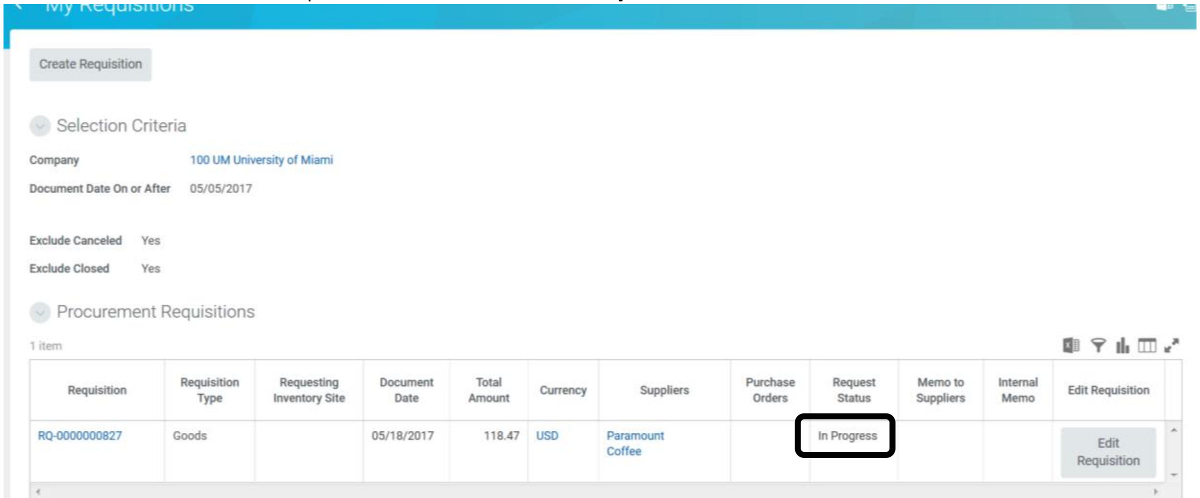
25. Click **Requisitions**.



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")	
Sub Object Codes and Descriptions	**Spend Categories and Descriptions**
3233 Chemical	SC08200 Chemicals
3218 Clerical Supplies	SC08218 Clerical Supplies
3229 Copy / Pub /Print-Supplies	SC08229 Photocopy, Publishing, & Printing Supplies
3223 Equipment Supplies	SC08203 Equipment Supplies (non-housekeeping)
3213 Food Supplies	SC08208 Food Supplies
3619 Meetings -Subsistence	SC08619 Food / Beverage during the a business meeting
3623 Food Service	SC08623 Food Service – Interdepartmental charges for catering from UM Dining Services
3624 Entertain - FoodBevRec	SC08624 Entertainment – Food, Beverage, Reception
3234 Gas Cylinders	SC08234 Gas Cylinders
3800 Hotel Conf & Seminars	SC08800 – Hotel Conferences & Seminars
3219 Instructional Supplies	SC08219 Instructional Supplies
4268 Managed Equip Maintenance	SC08047 Managed Equipment Maintenance
5105 Non Food Supplies	SC08621 Goods Services for Personal Use
3811 Other Outside Svcs.	SC08811 Outside Services
5904 Printing	SC08229 Photocopy, Publishing, & Printing Supplies
3227 Promotional Materials	SC08227 Promotional Materials
3225 Technical Supplies	SC08225 Technical Supplies Other