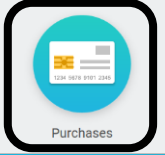
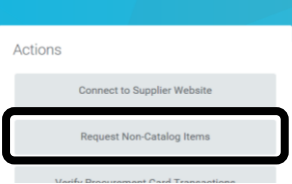
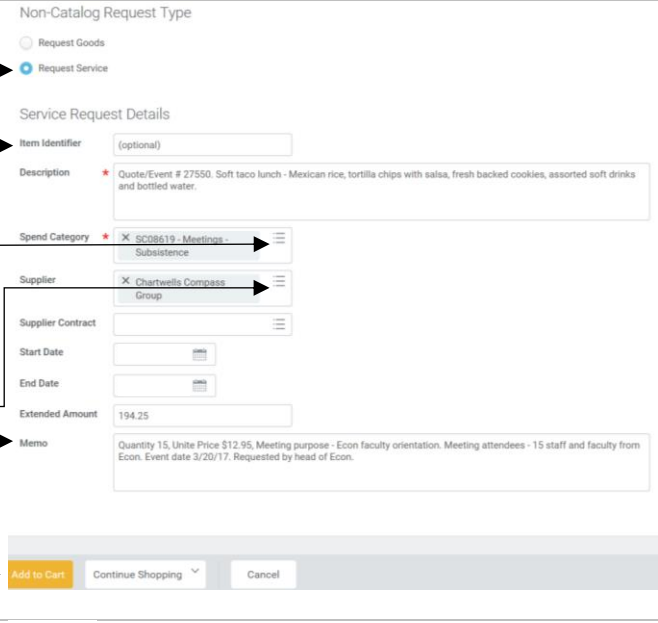


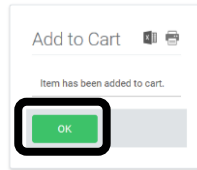


# Workday Services Non-Cat

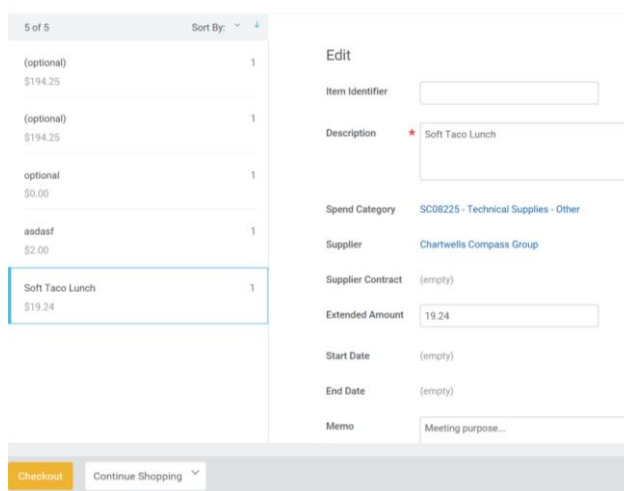
<http://workday.miami.edu>

<b>Request Non-Catalog Catalog Item(s)</b>	
1. Click the <b>Purchases</b> worklet.	
2. Click <b>Request non-catalog items</b> .	
<p>3. Select <b>Request Services</b>.</p> <p>4. <i>Item Number</i> – If the supplier quote lists an item number, type it here.</p> <p>5. <i>Description</i> - Describe the item, quote number, and any other relevant information for this item.</p> <p>6. <i>Spend Category</i> – FDM Converter: (not available on Internet Explorer and mobile devices. <a href="http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html">http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html</a>)</p> <p>7. <i>Supplier</i> – Find a corresponding <i>Supplier</i>.</p> <p>8. <i>Memo</i> - (Optional) Provide any other details regarding the order such as who requested the item and it's purpose.</p> <p>9. Click <b>Add to Cart</b>. To add another line item, complete steps 3-9 again.</p>	
10. To begin the checkout process, click the shopping cart icon in the upper right corner.	
11. Remove any items that are not ready to be checked out.	
12. Click <b>Checkout</b>	

13. A confirmation screen will appear. Click **OK**.



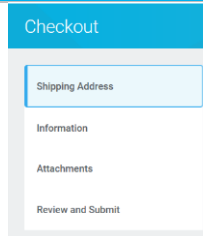
14. To delete a line item, select the corresponding line, and click the trash icon on the right hand side.



## Checkout

15. The **Checkout** screens contain the following sections:

- *Shipping Address*
- *Information*
- *Attachments*
- *Review and Submit*



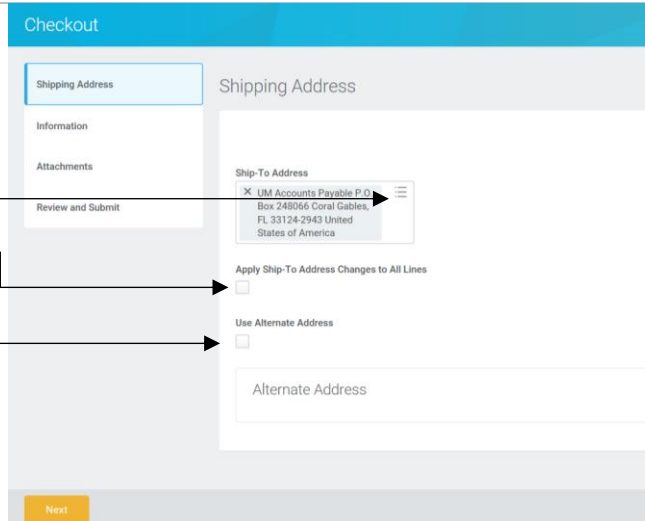
### *Shipping Address Tab*

16. To change the ship to address, click the stacked lines icon and search for the correct address.

17. 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.*

18. Click **Next**.



**Information Tab**

19. Requisition Type – Select **Service** or **Service Contract**.

20. *Sourcing Buyer* - Leave blank.

21. *High Priority* – Leave blank.

22. *Memo to Suppliers* – Note many vendors will not receive this information. Contact them directly with any specific instructions.

23. Click **Next**.

**Attachments Tab**

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

25. Click **Next**.

**Review and Submit Tab**

26. Upon entering this screen, *errors* and *alerts* will appear. Once all fields are completed click **Submit**.

27. Complete the *Spend Category* (formerly sub object) field for each line item. Copy and paste for each line item.

Goods

1 Item

Image	Item	Item Description	*Spend Category
	Item	Green Mountain Mocha Nut Fudge K-Cup 24 g	<input type="text"/>

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

Services

4 Items

Memo	Program	Grant	Gift	Project
Meeting Purpose - Econ faculty orientation. Meeting Attendees	PG005426 ECONOMICS			
Quantity 15, Unite Price \$12.95, Meeting purpose - Econ faculty orientation. Meeting attendees - 15 staff and faculty from Econ. Event date 3/20/17. Requested by head of Econ.	PG005426 ECONOMICS			
Meeting Purpose...	PG005426 ECONOMICS			

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

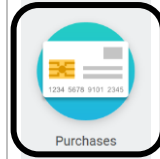
You have submitted Requisition: Heidi Tyre on 04/05/2017 for \$12.15 [Actions](#)

Up Next

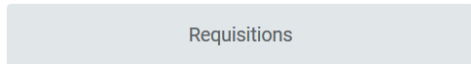
 Andrea Ruiz  
 Approval by Program Manager or Project Manager  
 Due Date 04/08/2017

## Checking the Status of a Purchase Requisition

30. Click the **Purchases** worklet.



31. Click **Requisitions**.



32. Use the search filters to find the requisition.  
OR  
Click **OK** to see all requisitions within the designated date range.

My Requisitions

Company

Requisition

Status

Requisition Type

Requesting Inventory Site

Document Date On or After

Document Date On or Before

Supplier

Spend Category

Item

Project

33. Scroll down to the requisition and check the **Request Status**.

my requisitions

Create Requisition

Selection Criteria

Company 100 UM University of Miami

Document Date On or After 05/05/2017

Exclude Canceled Yes

Exclude Closed Yes

Procurement Requisitions

1 item

Requisition	Requisition Type	Requesting Inventory Site	Document Date	Total Amount	Currency	Suppliers	Purchase Orders	Request Status	Memo to Suppliers	Internal Memo	Edit Requisition
RQ-000000827	Goods		05/18/2017	118.47	USD	Paramount Coffee		In Progress			Edit Requisition

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>

<b>Spend Categories - Common (formerly "Sub Object Codes")</b>	
<b>SUB OBJECT CODES</b>	<b>SPEND CATEGORIES</b>
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