Catering Requisitions in Workday

First, contact the supplier to obtain a quote. Then create a purchase requisition. For hotels, quotes with deposits and multiple invoices, choose “Request Non-Catalog Item” and “Services.”

http://workday.miami.edu

Create a Catering Requisition  Do not use these directions for quotes that include hotels, deposits or multiple invoices.

<table>
<thead>
<tr>
<th>1. Log into Workday.</th>
<th><a href="http://workday.miami.edu">http://workday.miami.edu</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>2. In the search box type “Create Req.”</td>
<td>![Create Req.](create Req.)</td>
</tr>
<tr>
<td>If the Create Requisition link does not appear, click All of Workday.</td>
<td>![All of Workday](All of Workday)</td>
</tr>
<tr>
<td>3. Click Create Requisition.</td>
<td>![Create Requisition](Create Requisition)</td>
</tr>
<tr>
<td>4. Complete the fields as follows:</td>
<td><img src="Company" alt="Company" /> × 200 Academy, <strong>Requester</strong> × Michelle Roy, <strong>Currency</strong> × USD, <strong>Requisition Type</strong> × Service</td>
</tr>
<tr>
<td>a. <em>Company</em> – The company should correspond to the driver work tag (Program, Grant, Gift, or Project) being used.</td>
<td><img src="Company" alt="Company" /> × 200 Academy</td>
</tr>
<tr>
<td>b. <em>Requester</em> – Leave as yourself, even when ordering on behalf of someone else.</td>
<td><img src="Requester" alt="Requester" /> × Michelle Roy</td>
</tr>
<tr>
<td>c. <em>Currency</em> – USD</td>
<td><img src="Currency" alt="Currency" /> × USD</td>
</tr>
<tr>
<td>d. <em>Requisition Type</em> – Service</td>
<td>![Requisition Type](Requisition Type)</td>
</tr>
<tr>
<td>5. Click Request Non-Catalog Items.</td>
<td>![Request Non-Catalog Items](Request Non-Catalog Items)</td>
</tr>
<tr>
<td>6. Complete the fields for each charge beginning with the first item listed. For example, a quote with 2 line items will require completion of the Ad-hoc Item form 2 times.</td>
<td>![Request Non-Catalog Items](Request Non-Catalog Items)</td>
</tr>
</tbody>
</table>

**Line 1 Example:**

a. Click Request Services.  ![Request Service](Request Service)
b. *Description* – Type the quote number and the item description, quantity, unit of measure and price. “Quote #54321, Cookie & Brownie Feast, Qty 40 each x 3.95”
c. *Spend Category* - SC08619 – Meetings Subsistence, SC08623 - UM Dining Services or SC09624 – Entertainment
d. *Supplier* - “Compass Group” (Doing Business As Chartwells, P15451009)
e. *Supplier - Contract* (leave blank)
f. *Start Date* - 9/17/18
g. *End Date* - 9/17/18
h. *Extended Amount* - $158.00
i. Memo - “Meeting Purpose - New Student Orientation. Attendees – 40 students, staff and faculty.”

j. Click Add to Cart.

k. Click Ok.

Line Item 2 Example:

l. Click Request Services.

m. Description – “Assorted soft drinks, freshly brewed Starbucks coffee and assorted herbal teas 40 each x $1.95”

n. Spend Category - SC08619 – Meetings Subsistence, SC08623 - UM Dining Services, or SC09624 – Entertainment

o. Supplier - “Compass Group” (DBA Chartwells)

p. Supplier - Contract (leave blank)

q. Start Date - 9/17/18

r. End Date - 9/17/18

s. Extended Amount - $78.00

t. Memo - “Meeting Purpose - New Student Orientation. Attendees – Estimated 40 students, staff and faculty.”

u. Click Add to Cart.

v. Click Ok.

7. Once all items are added to the cart, click the shopping cart icon in the upper right corner.

8. Review items in the cart.

To delete items that are not part of this requisition, select the item on the left.

Then click the trash icon on the right.

9. Click Checkout.

Checkout

The Checkout screens contain the following tabs:

- Shipping Address
- Information (Requisition Type)
- Attachments
- Line Defaults (new 9/9/18)
- Review and Submit
10. **Shipping Address Tab**
   a. Change the address by clicking the menu icon. Type the street address numbers followed by a space and the room number ("1320 400.36")
   b. Check **Apply Ship-To Address Changes to All Lines**.
   c. Do not touch the **Use Alternate Address** box.
      To add a UM address email the request to help@miami.edu.
      To add a Non-UM address into Workday, have your supervisor email the address and reason to hjiang@miami.edu and smontes@miami.edu.
   d. Click **Next**.

11. **Information Tab**
   a. **Requisition Type** – Select **Goods**.
   b. **Sourcing Buyer** – (leave blank)
   c. **High Priority** – (leave blank)
   d. Click **Next**.

12. **Attachments Tab**
   a. Attach any supporting documentation. A quote is not required for catalog orders.
   b. Click **Next**.

13. **Default Lines Tab**
    If the requisition contains only one line item, click **Next** and skip to the next step.
    OR
    If the requisition contains 2 or more line items, complete the following fields.
    a. **Requested Delivery Date** – leave blank
    b. **Supplier** – leave blank
    c. **RFQ Requirements** – **Keep Current Selections**
    d. **Copy From Worktag** – leave blank
    e. If using one driver worktag, select **Use Default Worktags**. Type the **Program, Grant, Gift or Project**. Then click **Next**.
    OR
    If using multiple driver worktags, select **Use Default Worktags**. Type the **Program, Grant, Gift, or Project**. Click the "+" icon on the left to add another driver worktag. Update the percentage fields.
   f. Click **Next**.
14. **Review and Submit Tab**
   
a. **Spend Category** – Complete the **Spend Category** field for every line item.
   
b. **Driver Worktag** – Type the Program, Grant, Gift or Project# for each line item.
   
c. Confirm all information and correct any errors or alerts. Once all errors are corrected, the message will still appear and the requisition can be submitted.
   
d. To prompt the first approver, click **Submit**.

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### Check the Status of a Requisition

1. Log into Workday. [http://workday.miami.edu](http://workday.miami.edu)

2. Click **Purchases**.

3. From the **View** section, click **Requisitions**.

4. Adjust the search filters as needed.
   
   **Company** – (blank) Click “X” to view all reqs.
   
   **Document Date On Or After** – select a date
   
   **Supplier** – Search for the supplier’s name
   
   **Exclude Cancelled** - uncheck
   
   **Exclude Closed** - uncheck
   
   Click **OK**.

5. Review the Requisition Status.
   
   **Draft** – not submitted
   
   **Cancelled** – the req has been cancelled
   
   **Closed** – approved, a PO has been issued
   
   **In Progress** – pending approval

6. To view pending approvers, click the requisition number.

7. Scroll down and open the **Process History**.

8. Scroll down to view the person **Awaiting Action**.