# Ad-Hoc Goods Requisitions in Workday

First, contact the supplier to obtain a digital quote. Then create the purchase requisition.

[http://workday.miami.edu](http://workday.miami.edu)

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<table>
<thead>
<tr>
<th>Create a Goods Requisition</th>
<th>Before creating the requisition, contact the supplier to obtain a quote. Request that a copy of the quote to be sent to you.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Log into Workday.</td>
<td><a href="http://workday.miami.edu">http://workday.miami.edu</a></td>
</tr>
<tr>
<td><strong>2.</strong> In the search box type <strong>Create Req.</strong></td>
<td>If the Create Requisition link does not appear, click All of Workday.</td>
</tr>
<tr>
<td><strong>3.</strong> Click Create Requisition.</td>
<td></td>
</tr>
<tr>
<td><strong>4.</strong> Complete the fields as follows:</td>
<td></td>
</tr>
<tr>
<td>a. Company – The company should correspond to the driver work tag (Program, Grant, Gift, or Project) being used.</td>
<td></td>
</tr>
<tr>
<td>b. Requester – Leave as yourself, even when ordering on behalf of someone else.</td>
<td></td>
</tr>
<tr>
<td>c. Currency – USD</td>
<td></td>
</tr>
<tr>
<td>d. Requisition Type – Service</td>
<td></td>
</tr>
<tr>
<td><strong>5.</strong> Click Connect to Supplier Website.</td>
<td></td>
</tr>
<tr>
<td><strong>6.</strong> Click Connect.</td>
<td></td>
</tr>
<tr>
<td><strong>7.</strong> Click Ad-hoc Item.</td>
<td></td>
</tr>
</tbody>
</table>

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**In UMarketplace, Add an Ad-Hoc Item To The Cart.**

| 1. Click Ad-hoc Item. | ![Quick Links](http://example.com/quick-links)
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shop Home</td>
<td><img src="http://example.com/quick-links" alt="Quick Links" /></td>
</tr>
<tr>
<td>Ad-hoc Item</td>
<td><img src="http://example.com/quick-links" alt="Quick Links" /></td>
</tr>
</tbody>
</table>
2. Complete the Ad-hoc fields based on the first line item in the quote.
   - Done adding items? Click **Save and Close**.
   - Need to add more items? Click **Save and Add Another**.
   - To discontinue shopping and go back to UMarketplace click **Close**.

3. To review the cart click the shopping cart icon in the upper right corner.

4. Click **View Cart Details**.

5. To transfer the cart back to your Workday screen, click **Send to Workday**.

6. 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.

7. Click **Checkout**.

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**Checkout**

The Checkout screens contain the following tabs:

- Shipping Address
- Information (Requisition Type)
- Attachments
- Line Defaults (new 9/9/18)
- Review and Submit
8. **Shipping Address Tab**  
a. Change the ship to 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.**

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

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

11. **Line Defaults 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.**
### 12. 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**.

If there are no errors, the first approver’s name will appear.

### Check the Status of a Requisition

Find the requisition and view the Process History.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Log into Workday.</td>
</tr>
<tr>
<td>2.</td>
<td>Click <strong>Purchases</strong>.</td>
</tr>
<tr>
<td>3.</td>
<td>From the <strong>View</strong> section, click <strong>Requisitions</strong>.</td>
</tr>
</tbody>
</table>
| 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**. |