Conga Workday-Initiated Contracts
When requested by the Department of Purchasing/Sourcing, use this guide to process purchase requisitions that are tied to an Academic or Miller School of Medicine contract. E.g., consulting services, licenses, capital software, hotel conferences and seminars, non-UM owned moveable and capital equipment. https://workday.miami.edu

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Before Completing the Contract Request Form

1. **Search for the supplier in UMarketplace** - Confirm the location, supplier’s status, supplier ID number and contact information. If the supplier is not active in Workday for purchase requisitions, **onboard the supplier**. Be aware the request can be completed in minutes, but it may take the supplier weeks to gather and submit their information.

2. **Create a purchase requisition** and track the requisition **status**.

   **TIPS:**
   **Description:**
   - Scope of work
   - Specific payment terms (E.g., Wire transfer/deposit due 30 days prior to start date.)
   - Deadlines (E.g., Contract needs to be executed 45 days prior to start date.)

   **Attachments:**
   - The **Service Agreement** form no longer needs to be attached. Instead provide details in the **Description** field. The contract will be built in Conga.
   - If the supplier provides a contract (not preferred, but is accepted), attach it as a **Word** document. This will expedite the redlining process. Web terms and referenced web links should not be submitted. Reference: **Signature Authority**.
   - A **Consulting Questionnaire** will need to be provided if the vendor is an individual and not a business entity. (Completed by the UM department)
   - For UM logos, printing materials, branding, signage, etc. attach mock-ups/proofs
   - If a UM website or social media is involved, attach prior approval from UM Communications.

   **Extended Amount (Services only):**
   - Single Year Contracts - Type the total dollar amount of the contract.
   - Multi-Year Contracts - Type either the amount to be spent the first year or for all years, depending on how much should be encumbered at the time the requisition is submitted.

   **Internal Memo:**
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- Research/Project number
- Previous PO number (if applicable)
- Date the check needs to be sent by (optional)

3. **Review the Process History** - After the Purchasing Buyer has approved the requisition once, end users can confirm if it is necessary to complete a Conga Request form. If a Conga request form is required, the end user will receive an email notification and can an auto generated draft in Conga to be edited and submitted. The Purchasing Buyer will work the contract. The end user can track the progress.

A Contract Request Form **needs** to be completed.

A Contract Request Form does **not** need to be completed.

4. **Finding the Contract Request Form** - If the end user has received an email notification from NoReply@hub.nobatuscontracts.com, click the blue link to login or login directly at https://conga.miami.edu.

5. **Find the Draft** - The draft automatically appears in Conga. It contains Workday information and attachments.

*SEARCH TIP:* If the draft does not appear, edit the Created within field to **All time**.

### Completing the Contract Request Form

6. **Edit the Draft** - Workday information has transferred into Conga and is disabled for editing. After the Conga draft has been submitted, Contract Owners may be able to edit/update information.

**Company Name**
The supplier name will auto-populate. **Do not edit this field.** Temp Vendor may appear if the supplier was onboarded the same day the draft was created.
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Contract Purpose:
- Requisition number (E.g., RQ-0000123456)
- Purchase Summary - Include as much detail as possible up to 253 characters to answer who, what, when, where, and why. (e.g., "RQ-0000123456, Fall 2024 Recruitment Services for International Students, taking place in Shanghai, September 19-23, 2022...")

Agreement Type: Choose Standalone, Addendum, or Master

Contract Type
Click the drop down next to Purchase Agreement UM Making Purchase, and select: Goods, Goods and Services or Services

1. Purchase Agreement (UM making purchase)
   - Goods
   - Goods and Services
   - Public Health
   - Trust/Jackson Health System services
   - Services

Contract Value Total amount during the lifespan of this agreement.
Contract Currency Always select USD.

Workday Information
Changes made afterward the Workday Buyer approved, may not appear. After submitting, any changes will be updated by the Purchasing Buyer.

Tracking the Status in Conga
7. Find the corresponding contract. To view the details, click the blue arrow. TIP: If the arrow does not appear, scroll to the right.

View the Workflow
8. View the Links: Documents, Messaging, People, and History (Bottom left corner)
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Documents – All attachments from all people will appear.

<table>
<thead>
<tr>
<th>Revision</th>
<th>Document Type</th>
<th>Filename</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Contract-Draft</td>
<td>FEED-STA-00001233-Purchase Agreement (Goods and Services)...</td>
</tr>
</tbody>
</table>

Messaging – Comments from UM Departments or supplier reps. (e.g., Risk Management)

<table>
<thead>
<tr>
<th>Subject</th>
<th>Created On</th>
<th>From</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEED-STA-0000...</td>
<td>08/17/2021 09:23:00</td>
<td>Pallais, Keneth &lt;k.pallais...</td>
<td>Good morning Contract...</td>
</tr>
<tr>
<td>RE: FEED-ST-...</td>
<td>08/19/2021 09:59:07</td>
<td><a href="mailto:rkiss@miami.edu">rkiss@miami.edu</a></td>
<td>Hi Ken, I am reviewing t...</td>
</tr>
</tbody>
</table>

People – View the people involved with this Contract Request Form: Requester, Contract Owner, and Approvers

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Administration (Business)</td>
<td>Maurio, Abigail</td>
<td><a href="mailto:amaurio@miami.edu">amaurio@miami.edu</a></td>
</tr>
</tbody>
</table>

History – View the actions taken on this Contract Request Form.

<table>
<thead>
<tr>
<th>Field</th>
<th>Original Value</th>
<th>Updated Value</th>
<th>User</th>
<th>Updated On</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Contract Status</td>
<td>Signed/Not Active Yet</td>
<td>Active</td>
<td>Pallais, Keneth 03/29/2022 12:53:29</td>
</tr>
<tr>
<td>2</td>
<td>Effective Date</td>
<td>2021-06-01 00:00:00.0</td>
<td>2022-03-29 00:00:00.0</td>
<td>SYSTEM, ACCOUNT 03/29/2022 12:00:28</td>
</tr>
</tbody>
</table>

For assistance, contact PurchasingHelpDesk@miami.edu