Conga Workday-Initiated Request Form Tutorial for Academic and Research Requestors

Use the following process when a Workday Purchase Requisition requires a contract, and a Conga email notification has been sent.

Table of Contents

Contract Commodity Examples ................................................................................................................... 1
Possible Participants .................................................................................................................................... 1
Process Breakdown ...................................................................................................................................... 2
  Create a Workday Requisition. ................................................................................................................ 2
  The Purchasing Buyer determines if a contract is needed. ..................................................................... 3
  Access and Complete the Contract Request Form. ................................................................................. 3
  View the Contract Profile in Conga. ......................................................................................................... 5
  Receive the Fully Executed Contract and Purchase Order Number. ....................................................... 7

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Contract Commodity Examples

- consulting services
- licenses
- capital software
- hotel conferences and seminars
- non-UM owned moveable capital equipment

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Possible Participants

**Contract Requestor (Workday Requisition Initiator)** – a UM employee who completes and submits a contract request for a contract.

**Contract Owner (Purchasing Buyer)** – individual in one of the Central Contracting Units who is responsible for managing all activities related to processing a contract.

**Contract Admin** – individual in one of the Central Contracting Units who is responsible for managing all activities related to processing a contract (in certain circumstances) and who support Contract Owners.

**Department Head Approver** *(participates outside the system)* – individual who approves a contract when requested to do so, when required, by a Contract Owner. Be aware, “Department Head” may or may not have the University title Department Head.

**Approver/Reviewer** – individual who approves a contract during the contracting process; approvals are triggered automatically due to a specific response to a
**Contract Request Form** question or they are requested specifically by Contract Owners

**Final Approver** – individual who approves a contract at the end of the contracting process prior to obtaining signatures.

**Review Owner** – individual who reviews a contract that has been requested on behalf of another Central Contracting Unit not participating in Conga.

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**Process Breakdown**

**Create a Workday Requisition.** – Create and submit a Non-catalog Purchase Requisition using the tips below.

- **Description:**
  - Include the scope of work if applicable.
  - Specify any payment plan details. For example, “A down payment of $100 will be paid before the work begins. $50 will be paid for each additional month of service, over the life span of two years.

- **Attachments:**
  - The Service/Consulting Agreement form no longer needs to be attached. Instead provide details in the Description field.
  - If the supplier provides a contract, attach it as a Word document. This will expedite the redlining process. Web terms and referenced web links should not be submitted.
  - Sole Source Justification (if needed)
  - Previous PO number (optional)
  - A Consultant Questionnaire will need to be provided if the vendor is an individual and not a business entity. (Completed by the department)
  - Attach mock-ups/proofs for UM logos, printing materials, branding, signage
  - If a UM website or social media is involved, attach prior approval from UM Communications.

- **Start and End Date:**
  - The anticipated or effective date the agreement begins and ends.
  - Include this information to avoid processing delays.

- **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:**
  - General description of the good or service
  - Research/Project number
  - Previous PO number(s) (optional)
  - Need by date (optional)
  - Date the check needs to be sent by (optional)
  - Additional internal notes (optional)
The Purchasing Buyer determines if a contract is needed.

To check if a Contract Request Form is required, first confirm that all approvals including the first Purchasing Buyer’s approval has occurred. These can be viewed in the Workday Process History.

- If a contract is not needed, the Workday Process History will state “Not Required.”

- If a contract is needed, the Workday Process History will state “Completed.” This indicates completion of the requisition information being sent over to Conga and the requester can complete the Contract Request Form. An email and link will be sent to the requester.

Access and Complete the Workday-Initiated Contract Request Form in Conga.

If you have received an email notification from Conga Contracts, click the blue link to begin completing the Contract Request Form.

If you have not received an email notification from Conga Contracts, the Workday approvals including the first Buyer approval, may need to be completed.

**TIP:** If the email cannot be found, login directly at https://conga.miami.edu

Log in using your CaneID username and password.

If you are not taken directly into the Contract Request Form, click the drop down next to Contracts and select Requests.

Click the green check mark to open the Contract Request Form. Some of the data provided in Workday has transferred into Conga. These fields are disabled in Conga.

**TIP:** If the request does not appear, adjust the Created within field.

Complete the Contract Request Form. Note, some fields may auto-populate from Workday and may be changed by the Contract Owner after the form has been submitted. Additional fields may appear depending on how each question is answered.
- **Company Name** is automatically populated with the name of the supplier you selected in Workday. If the supplier selected in Workday has not yet been added to Conga (i.e., the supplier information was not passed through the integration to Conga during the last nightly update), Company Name will automatically be populated with Temp Vendor. **Do not edit this field.**
- **Request Number**: (This will auto populate and cannot be changed.)
- **Contract Purpose**: (summary of the good or service being provided) E.g.: Advising service for lecture translation.
- **Agreement Type**: (Choose **Standalone**.) (E.g.: Master would only be used in the case of a new University Wide Contract.)
- **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 contract amount)
- **Contract Currency**: (always select USD)
- **Proposed Expiration Date**:
- **Are you attaching documentation provided by Counterparty?**:
- **Will any services be performed on University premises?**:

**International Information**
- Will the vendor be providing any data or processing any data related to individuals located in the European Union? (Contact Privacy)
- Will any data pertaining to individuals be transferred to or processed in the European Union under the agreement; and do the activities under the agreement involve any data pertaining to individuals located in the European Union?

**Counterparty Contact information** (To expedite the process, provide the supplier contact information. Specifically, this should be the supplier representative that is working with your department.)
- **Counterparty Contact Name**:
- **Counterparty Contact Email**:
- **Counterparty Contact Phone Number**:
- **Request Date**: (Date the Contract Request was submitted)
- **University Division**: (E.g.: Human Resources)
- **Department**: (E.g.: Talent and Organization)

**Security and Privacy Information**:
- Will Counterparty have access or be exposed to protected health information or personally identifiable information?
• Will the vendor be storing, processing, transmitting, credit card holder data, or be providing services that control or could impact the security of cardholder data?

Procurement Information:
• **Intended Vendor:** (Do not complete this field unless the Company field is populated with “Temp Vendor.”)
• **Will this contract involve the purchase of supplies, instrumentation, equipment and/or contracted services which are new technology for the Counterparty or have not been previously used at the University?**

Additional Contract information:
• **Additional Relevant Information:**

**Workday Information:** These fields represent the information that integrated over from Workday at the time the requisition was approved by the Purchasing Buyer. Changes made afterwards may not appear.
• Workday Request Date
• Requisition Number
• Submitted by First Name
• Submitted by Last Name
• Submitted by Email
• Sourcing Buyer
• Status (Requisition)
• Total Requisition Amount
• Deliver-to Address
• Ship-To Address
• Workday Company Code (E.g.: 200 Academy)
• Workday Company ID
• Workday Internal Memo
• Workday Memo to Suppliers
• Description

Documents:
• Workday attachments will transfer into Conga.
• Additional attachments can be added.

Click **Submit**.

**View the Contract Profile in Conga.** – Workflow, Documents, Messaging, People, and History

To find the Contract Profile, click the **drop down** next to Contracts and select **Requests**.
Click the green check mark to open the Contract Request Form draft. Some of the data provided in Workday has transferred into Conga. These fields are disabled in Conga.

View the workflow.

View the Links: Documents, Messaging, People, and History

Documents – All attachments will appear here, regardless of who uploaded.

- **Messaging** – Comments from UM Departments or supplier representatives

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

- **History** – View the actions taken on this Contract Request Form.
Receive the Fully Executed Contract and Purchase Order Number.

Once the contract is fully executed, the Contract Owner (Purchasing Buyer) attaches it to the Workday purchase requisition, approves the requisition, and sends the Purchase Order to the supplier.

To obtain a copy of the fully executed contract either:
- Log into Workday, find the requisition and open the attached contract.
- Log into Conga, find and open the request, scroll down to Links section, and click Documents. Find the “Contract – Executed” and click the blue arrow to download.

For questions, contact purchasinghelpdesk@miami.edu