Purchase Order Contracts Tutorial

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 + https://conga.miami.edu

#1 Contacts Tip: Contracts can be much more complex than Purchase Orders. Start the process as soon as possible by submitting a purchase requisition.

Contents

1. Workday

a. Complete Supplier Onboarding

Search for the supplier in UMarketplace, not Workday. Confirm:

- The addresses match (quote and UMarketplace)
- The supplier has an *Active* status. ✓ ***TIP:*** Suppliers with no UM procurement activity in the past 18 months will need to be onboarded again.

If the supplier is not active in Workday for purchase requisitions, use an alternate active supplier, or complete a New Supplier Request Form as soon as possible. ***TIP:*** Completing the New Supplier Request form can take the department minutes, but it may take the supplier weeks to gather and submit their info.

b. Create a Purchase Requisition

TIP: The employee that creates the Workday purchase requisition, also submits the Conga request form, and has the greatest visibility in Conga for provide the department with status updates.

Description:

- Scope of work
- Specific payment terms (E.g., Deposit due 30 days prior to start date.)
- Deadlines (E.g., Contract needs to be executed 45 days prior to start date.)

Extended Amount (*Service lines* 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.

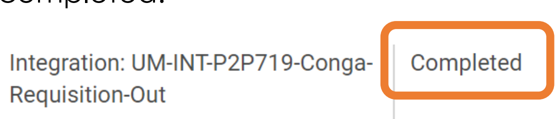
Internal Memo:
- Research/Project number
- Previous PO number (if applicable)
- Date the check needs to be sent by (optional)

Attachments:
- **Service Agreements** are no longer required. Instead provide details in the *Description* field. The agreement will be built in Conga with UM's terms and conditions.
- **Supplier's Contracts** are not preferred but are accepted.
    - Attach a **Word** document to expedite the redlining process.
    - Web terms and referenced web links should not be submitted.
    - Departments should initial, **never sign**. Signature Authority Policy
- A **Consulting Questionnaire** is only required if the vendor is an **individual**, not a business entity.
- **UM Logo** goods and services should include a mock-up or proof (e.g., printing, branding, signage)
- **Websites & Social Media** require prior approval from UM Communications.

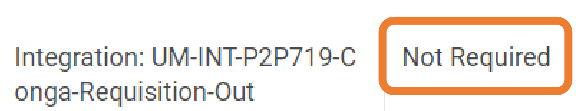
c. Track Approvals

After the Purchasing Buyer has approved the requisition one time, end users can confirm if it is necessary to complete a Conga Request form. When a Conga request form is required, integration from Workday to Conga will appear in the Workday Process History as "Completed." Also the end user will receive an email notification and 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 is **needs** to be completed.



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



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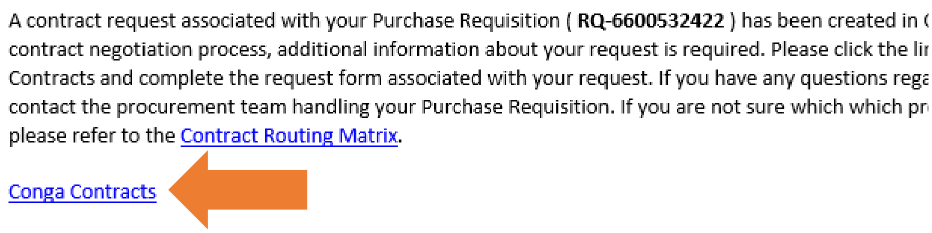
Alternately, the requestor will also receive an email notification from NoReply.congacontracts@miami.edu, indicating:

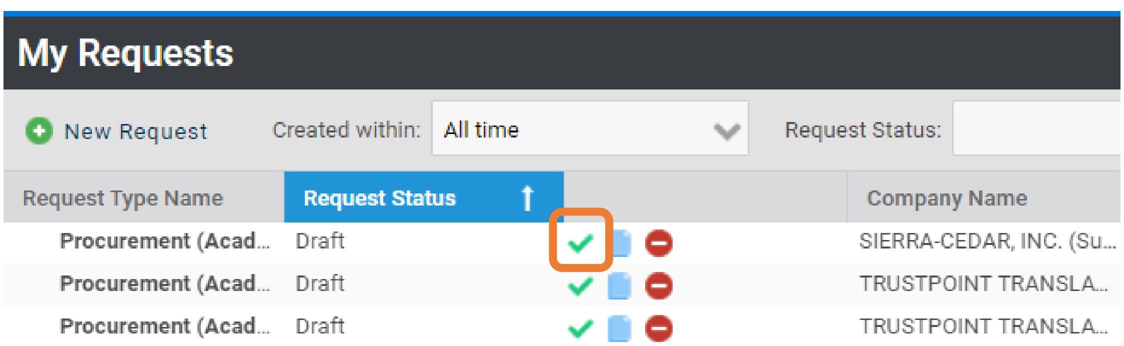
- The supplier is being loaded into Conga, wait for this process to be completed.
- A Draft is pending the requestors completion before the contract can be processed, proceed with the login instructions by clicking the Conga Contracts link or logging into Conga at https://conga.miami.edu.


A contract request associated with your Purchase Requisition (**RQ-6600532422**) has been created in (
contract negotiation process, additional information about your request is required. Please click the lir
Contracts and complete the request form associated with your request. If you have any questions rega
contact the procurement team handling your Purchase Requisition. If you are not sure which which pr
please refer to the Contract Routing Matrix.

Conga Contracts

2. Conga

a. Find the *Draft* – An integrated *Draft* form will appear. It automatically contains Workday information such as the requisition and attachments. Click the green checkmark to begin editing. *Tip:* If the draft does not appear, find the *Created Within* field and select **All time**.



b. Edit the *Draft*

- **Contract Purpose –** Summarize the purchase. Include as much detail as possible up to 253 characters to answer who, what, when, where, and why. (e.g., "Fall 2024 Recruitment Services for International Students, taking place in New York, September 19-23, 2023…"
- **Agreement Type -** Choose ***Standalone***, ***Addendum***, or ***Master***

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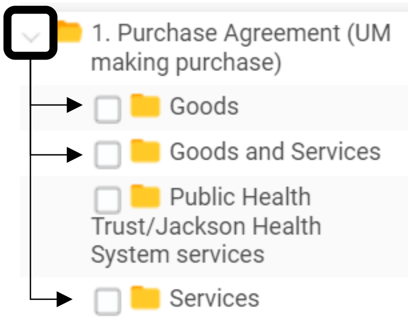
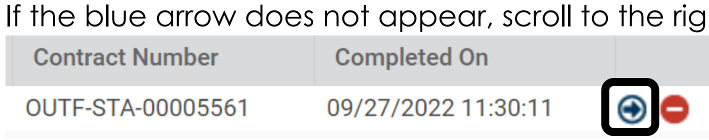
- **Contract Type -** Click the drop down next to *Purchase Agreement UM Making Purchase*, and select: ***Goods***, ***Goods and Services*** or ***Services***



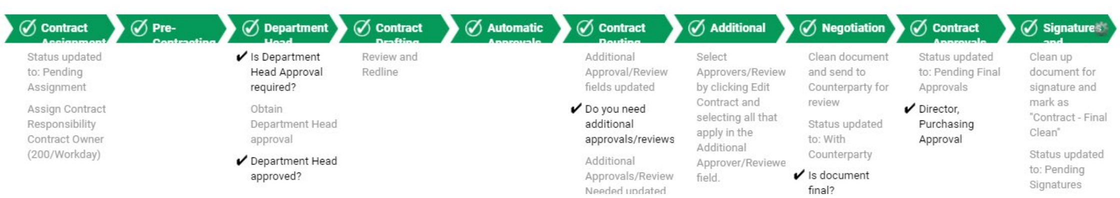
- **Contract Value** Total amount during the lifespan of this agreement.
- **Contract Currency** Always select **USD**.
- The supplier's name will auto-populate. **Do not edit this field.**
- After the Conga draft has been submitted, Contract Owners can edit/update information.

c. Track the Workday-Initiated Conga Request

- Find the corresponding contract. To view the details, click the blue arrow. ***TIP:*** If the blue arrow does not appear, scroll to the right.

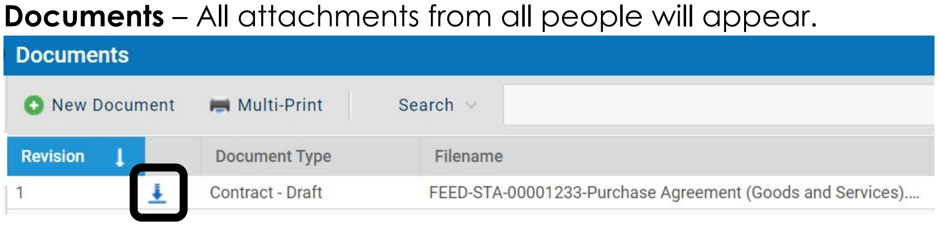


- View the Workflow



- For detailed information, view the *Links* section: *Documents*, *Messaging*, *People*, and *History*.

Documents – All attachments from all people will appear.



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

Messaging

New Thread

Subject	Created On	From	Content
FEED-STA-0000...	08/17/2021 09:23:00	Pallais, Keneth <k.pallai...	Good morning Contract...
RE: FEED-ST...	08/19/2021 09:59:07	rkiss@miami.edu	Hi Ken, I am reviewing t...

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

People

Responsibility	Name	Email Address
Contract Administration (Busines...	Maurio, Abigail	amaurio@miami.edu

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

History

History | Work Log History

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

Once UM and the supplier agree on all terms and conditions, the Buyers will finalize the contract, obtain signatures, generate a PO, and send the fully executed contract to the supplier.

Purchasing Assistance

PurchasingHelpDesk@miami.edu

New Supplier Request Form
Creating a Purchase Requisition
Completing a Conga Request Form Draft

Approving Buyer / Sourcing Team

Detailed updates after the *Conga Contract Request* form has been submitted.

Non-Purchase Order Contract Assistance

Contract Matrix