Conga Workday-Initiated Request Form

Academic and research requestors should use this tutorial to initiate, submit, and track a contract that correspond to a purchase requisition.

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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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1. Workday Supplier Onboarding
Before beginning this process, confirm the supplier has been onboarded. If not, submit a New Supplier Request form. Be aware the request can be completed in minutes, but it may take the supplier weeks or more to gather and submit their information.

2. Workday Purchase Requisitions
Gather information, create a purchase requisition, and track the requisition status

a. Gather Information
- Program/Grant/Gift/Project - What is the Driver Worktag? (E.g., PG00#### or BG00####)
- Statement of Work / Define the services that will be rendered and/or goods that will be provided.
- 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.)
- Spend Category - (E.g., SC08105 Consulting Fees)
- Start Date & End Dates
- Supporting documentation: (E.g.: quote and Consulting Questionnaire) If using the supplier’s contract, the department should read and initial. Never sign a contract. Only a handful of people at UM have signature authority.

b. Create a Purchase Requisition
TIPS: The following are specific to contracts:

Description:
- Scope of work or description of goods / services
- Unique payment details
- Deadlines
- The Service Agreement form no longer needs to be attached. Instead provide details in the Description field. The contract will be built in Conga.

Attachments:
- 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.
- Sole Source Justification (if needed)
- 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, etc.
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- 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:
- Research/Project number
- Previous PO number (if applicable)
- Date the check needs to be sent by (optional)
- Additional internal notes (optional)

c. Track the Status
Track the status of Departmental Approvals and the first Buyer approval. After the buyer approves once a drafted request form with Workday information will automatically be created for the end user to edit and submit.

3. Conga Contract Request Forms
If a Conga request form is required, the end user finds the draft that was automatically created for them. Then edit and submit. The Purchasing Buyer will work the contract. The end user can track the progress.

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

| Integration: UM-INT-P2P719-Conga-Requisition-Out | Not Required |

- If a contract is needed, the Workday Process History will state “Completed.” This only indicates the information from Workday has been sent to Conga.

| Integration: UM-INT-P2P719-Conga-Requisition-Out | Completed |
b. Login to Conga
If the end user has received an email notification from Conga Contracts, click the blue link to login. Or login directly at [https://conga.miami.edu](https://conga.miami.edu)

Hello Michelle,

Your requisition has been received by Conga Contracts. In order to complete your request additional information is required. Please click the link below or log directly into Conga Contracts to complete the "Contract Request Form".

From the dashboard header, click the drop down menu arrow next to "Contracts" and select "Requests". Select your contract record by clicking the corresponding green check mark. Once selected, please update the form with the appropriate information and complete all required fields. To complete the step, click "Submit Request".

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

Homepage Set up:

TIP: To add/remove tabs, click the drop down, choose Columns, and check/uncheck boxes.
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**TIP:** Rearrange header tabs by dragging left / right.

<table>
<thead>
<tr>
<th>Request Type Name</th>
<th>Request Status</th>
<th>Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workday-Initiated Request Form</td>
<td>Accepted</td>
<td>JENNY ABREU (Supplier Contracts On... JENN STA-00000925</td>
</tr>
</tbody>
</table>

**d. Edit the Draft**

**TIP:** Workday information has transferred into Conga and is disabled for editing. After the 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.

**Contract Purpose:**
- Type the requisition number. (e.g., RQ-0000123456)
- Type a summary of the good / service. 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**

**Contract Value** Total amount during the lifespan of this agreement.

**Contract Currency** Always select **USD**.
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**Workday Information**
Changes made afterward the Workday Buyer approved, may not appear.
After submitting, any changes will be updated by the Purchasing Buyer.

e. Track the status in Conga
Find the corresponding contract. To view the details, click the checkmark or arrow.

*TIP:* If the arrow does not appear, scroll to the right.

View the Workflow

Scroll to the bottom of the page to view the Links: Documents, Messaging, People, and History.

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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>
<tr>
<td>1</td>
<td>Workday Requisition Atta...</td>
<td>Email from UMIT regarding terms.pdf</td>
</tr>
<tr>
<td>1</td>
<td>Workday Requisition Atta...</td>
<td>RQ-0000410935- Department approval.pdf</td>
</tr>
<tr>
<td>1</td>
<td>Contract - Draft</td>
<td>FeedbackFruits B.V.,UM,DPA 8.11.21 rev to (draft 7-28-2021) UM...</td>
</tr>
<tr>
<td>1</td>
<td>Contract - Draft</td>
<td>2021-09-17 - University of Miami - Tool Agreement - PUR REV 10...</td>
</tr>
<tr>
<td>1</td>
<td>Contract - Executed</td>
<td>FEED-STA-00001233-summary.pdf</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.pallai...</td>
<td>Good morning Contract...</td>
</tr>
<tr>
<td>RE: FEED-STA...</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>
<tr>
<td>RE: FEED-STA...</td>
<td>08/19/2021 16:13:01</td>
<td><a href="mailto:rkiss@miami.edu">rkiss@miami.edu</a></td>
<td>Ken, I was able to beat ...</td>
</tr>
<tr>
<td>RE: FEED-STA...</td>
<td>08/19/2021 17:03:03</td>
<td>Pallais, Keneth &lt;k.pallai...</td>
<td>Awesome!!! Thank you y...</td>
</tr>
<tr>
<td>RE: FEED-STA...</td>
<td>08/23/2021 14:10:02</td>
<td><a href="mailto:rkiss@miami.edu">rkiss@miami.edu</a></td>
<td>Hi Ken, As a reminder, w...</td>
</tr>
<tr>
<td>RE: FEED-STA...</td>
<td>08/24/2021 08:57:25</td>
<td>Pallais, Keneth &lt;k.pallai...</td>
<td>Hi Rob, good morning. Y...</td>
</tr>
<tr>
<td>RE: FEED-STA...</td>
<td>08/24/2021 09:25:19</td>
<td><a href="mailto:rkiss@miami.edu">rkiss@miami.edu</a></td>
<td>Great, thank you [https:/...</td>
</tr>
<tr>
<td>RE: FEED-STA...</td>
<td>10/05/2021 08:29:34</td>
<td>Pallais, Keneth &lt;k.pallai...</td>
<td>Hi Rob, good morning. A...</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 Services)</td>
<td>Mauricio, Abigail</td>
<td><a href="mailto:amauricio@miami.edu">amauricio@miami.edu</a></td>
</tr>
<tr>
<td>Contract Administration (Business Services)</td>
<td>Datede Corinne, Joanna</td>
<td><a href="mailto:jxd1346@miami.edu">jxd1346@miami.edu</a></td>
</tr>
<tr>
<td>Contract Admin (Business Service...</td>
<td>Datede Corinne, Joanna</td>
<td><a href="mailto:jxd1346@miami.edu">jxd1346@miami.edu</a></td>
</tr>
<tr>
<td>Requester</td>
<td>Tejera, Andrea</td>
<td><a href="mailto:atejera@law.miami.edu">atejera@law.miami.edu</a></td>
</tr>
<tr>
<td>Contract Owner (Procurement)</td>
<td>Pallais, Keneth</td>
<td><a href="mailto:k.pallais@miami.edu">k.pallais@miami.edu</a></td>
</tr>
</tbody>
</table>

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**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>Contract Status</td>
<td>Signed/Not Active Yet</td>
<td>Active</td>
<td>Pallais, Keneth</td>
<td>03/29/2022 12:53:29</td>
</tr>
<tr>
<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</td>
<td>03/29/2022 12:00:28</td>
</tr>
<tr>
<td>Contract Status</td>
<td>Pending Signatures</td>
<td>Signed/Not Active Yet</td>
<td>SYSTEM, ACCOUNT</td>
<td>03/29/2022 12:00:28</td>
</tr>
<tr>
<td>Contract Status</td>
<td>Pending Final Approvals</td>
<td>Pending Signatures</td>
<td>Pallais, Keneth</td>
<td>03/29/2022 11:06:54</td>
</tr>
<tr>
<td>Contract Status</td>
<td>With Counterparty</td>
<td>Pending Final Approvals</td>
<td>Pallais, Keneth</td>
<td>03/29/2022 08:54:28</td>
</tr>
<tr>
<td>Contract Status</td>
<td>With Contract Owner</td>
<td>With Counterparty</td>
<td>Pallais, Keneth</td>
<td>03/29/2022 08:54:05</td>
</tr>
</tbody>
</table>

4. Workday Purchase Orders

Purchasing Buyer generates a Purchase Order and sends the information to the supplier.

**Processing a Fully Executed Contract** – Once the contract is fully executed, the Contract Owner (Purchasing Buyer) attaches the document to the Workday purchase requisition, approves the requisition, and sends the Purchase Order and contract to the supplier.

**Obtain a copy of the fully executed contract:**

- 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.

5. Workday Invoicing

- To obtain an invoice, reach out to the supplier.
- For questions related to **processing invoices**, reach out to **Accounts Payable**.

6. Workday Change Orders and Conga Addendums

- For a new scope of work or a new purpose, create a new purchase requisition.
- If changes are needed, initiate a **Workday change order**. The Purchasing Buyer will manually update the Conga information as needed.

For questions, contact **purchasinghelpdesk@miami.edu**