Conga Workday-Initiated Request Form

Academic and research requestors, 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

Possible Participants

- **Requestor** (Workday Requisition Initiator) - a UM employee who completes and submits a contract request for a contract
- **Owner** (Purchasing Buyer) – individual in one of the Central Contracting Units who is responsible for managing all activities related to processing a 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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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.

1. Workday Purchase Requisition

Create, submit, and track a Purchase Requisition

End user gathers 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.

End user creates and submits 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.
- Attachment:
  - 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.
  - If a UM website or social media is involved, attach prior approval from UM Communications.
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- **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)

**End user tracks approvals.** Departmental approvals + Buyer approves 1x. After the buyer approves once a drafted request form with Workday information will automatically be created for the end user to edit and submit.

### 2 Conga Contract Request

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.

**Is the Conga Request Form required?** – The end user confirms 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 requestor.

**Login** - 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)
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Find the Draft

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

**TIP:** Customize header tabs by dragging left / right. Click the drop down to add / remove tabs.

Open the Draft - Click the check mark to open the Contract Request Form draft.

Edit the Contract Request Form

**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** is automatically populated with the name of the supplier you selected in Workday. **Do not edit this field.** 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**.
- **Request Number**: (This will auto populate and cannot be changed.)
- **Contract Purpose**: (Type the requisition number, followed by a summary of the good / service. Use 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)
- **Proposed Expiration Date**:
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- Are you attaching documentation provided by Counterparty?:
- Will any services be performed on University premises?:

International Information – If the vendor is not located or processing anything in the European Union, select "No" for both.
- 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? (i.e.: names, phone numbers, personal addresses, social security numbers, etc.)
- 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: (Type the scope of work.)

**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
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- 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.

Submit the requisition.

Track the status. Log into https://Conga.miami.edu. Find the corresponding contract. To view the details, click the checkmark or arrow.

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

**Documents** – All attachments from all people will appear.

**Messaging** – Comments from UM Departments or supplier reps. (I.e. Risk Management)

**People** – View the people involved with this Contract Request Form: Requester, Contract Owner, and Approvers
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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>1 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>2 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>3 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>4 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>5 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>6 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>

3 Workday Purchase Order

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.

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.

4 Change Orders & 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.
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Invoicing

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

For questions, contact purchasinghelpdesk@miami.edu