Conga Workday-Initiated Request Form Tutorial
for Academic and Research Requestors
Use the following tutorial to initiate, submit and track a contract tied to a purchase order.

1. Workday Purchase Requisition
2. Conga Contract Request
3. Workday Purchase Order

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Contract Commodity Examples
• consulting services
• licenses
• capital software
• hotel conferences and seminars
• non-UM owned moveable capital equipment

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.
Process Breakdown:

1. Workday Purchase Requisition

Create, submit, and track a Purchase Requisition

a) End user gathers information:
   • **Supplier** - Is the supplier onboarded for Workday Requisitions? (E.g., Supplier ID = P25094626, "SUP..." cannot be processed)
   • **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, Consulting Agreement, if using the suppliers contract department should read and initial (never sign).)

b) End user creates a **purchase requisition**:

   **TIPS:**

   • **Description:**
     o Scope of work or description of goods / services
     o Unique payment details
     o Deadlines
     o The **Service/Consulting Agreement** form no longer needs to be attached. Instead provide details in the **Description** field.

   • **Attachment:**
     o 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.
     o **Sole Source Justification** (if needed)
     o A **Consultant Questionnaire** will need to be provided if the vendor is an individual and not a business entity. (Completed by the department)
     o Attach mock-ups/proofs for UM logos, printing materials, branding, signage
     o If a UM website or social media is involved, attach prior approval from UM Communications.

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

   • **Extended Amount (Services only):**
     o **Single Year Contracts** - Type the total dollar amount of the contract.
     o **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) 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.

a) 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 requestor.

b) If you have received an email notification from Conga Contracts, click the blue link to begin completing the drafted Contract Request Form that has already been created for you.

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

c) Log in using your CaneID username and password.
d) The corresponding draft should appear.  
**TIP:** If the request does not appear, adjust the Created within field.  
**TIP:** Customize header tabs by dragging left or right, or click the drop down to add and remove tabs.

e) Click the 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.

f) 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 answers.  

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

- **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:** (Type the requisition number followed by a summary of the good or service being provided) E.g.: “RQ-0000123456, 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**

- **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 – 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
- 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.

g) To track the Contract profile, log into Conga, and find the corresponding contract. To view the details, click the checkmark or arrow.

View the workflow.

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

d) Documents – All attachments from all people will appear.

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

Purchasing Buyer sends the purchase order and fully executed contract to the supplier.

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 and contract to the supplier.

To obtain a copy of the fully executed contract either:

**h)** Log into Workday, find the requisition and open the attached contract.

**i)** 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