Ad-Hoc Goods Requisitions in Workday

First, contact the supplier to obtain a digital quote. Then create the purchase requisition.

http://workday.miami.edu

<table>
<thead>
<tr>
<th>Create a Goods Requisition - Before creating the requisition, contact the supplier to obtain a quote. Request that a copy of the quote be sent to you.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Log into Workday. <strong><a href="http://workday.miami.edu">http://workday.miami.edu</a></strong></td>
</tr>
<tr>
<td><strong>2.</strong> Click the Purchases icon.</td>
</tr>
<tr>
<td><strong>3.</strong> Click <strong>Connect to Supplier Website.</strong></td>
</tr>
</tbody>
</table>
| **4.** Complete the fields as follows: 
  a. Company – The company should correspond to the driver work tag (Program, Grant, Gift, or Project) being used. 
  b. Requester – Leave as yourself, even when ordering on behalf of someone else. 
  c. Currency – USD 
  d. Ship-To Address- Change address to your location. This is where the goods are being delivered 
  e. Choose applicable for either Program, Grant, Gift, or project. **Note:** This will default to all lines created. |
| **5.** Click **Connect.** |

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<tr>
<th>In UMarketplace, Add an Ad-Hoc Item to the Cart.</th>
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<td><strong>1.</strong> Click <strong>Ad-hoc Item.</strong></td>
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</tbody>
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Department of Purchasing

04/8/20 M.R.
2. Complete the Ad-hoc fields based on the first line item in the quote.

- Done adding items? Click **Save and Close**.
- Need to add more items? Click **Save and Add Another**.
- To discontinue shopping and go back to UMarketplace click **Close**.

3. To review the cart, click the shopping cart icon in the upper right corner.

4. Click **View Cart Details**.

5. To transfer the cart back to your Workday screen, click **Send to Workday**.

6. Review items in the cart.

   To delete items that are not part of this requisition, select the item on the left.

   Then click the trash icon on the right side of the screen.

7. Click **Checkout**.
8. Complete the **Spend Category** field for every Goods line item. Note, this step must be done prior to editing the Ship-To Address and Default Worktags.

9. **Shipping Address**
   
   Remove Accounts Payable.
   
   a. Click the **Related Actions** button and select **Edit Address**. Type the street address numbers followed by a space and the room number ("1320 400.36")
   
   b. Check **Apply Ship-To-Address Changes to All Lines**.
   
   c. Do not touch the Use Alternate Address box. Click **Apply**.

   - To add a UM address, email the request to help@miami.edu.
   - To add a Non-UM address, email the address and reason to hjiang@miami.edu. Copy your supervisor and smontes@miami.edu.

For a demo, view the video tutorial **Edit Ship-To & Default Worktags**.
10. **Requisition Information**
   a. **Request Date** – (leave as is)
   b. **Currency** – USD
   c. **Requisition Type** – See the [Requisition Type Guide](#) for examples.
   d. **High Priority** – Checking this box does not expedite the approval process.
   e. **Sourcing Buyer** – Leave blank.
   f. **Memo to Suppliers**
   g. **Internal Memo**  
      Be aware not all suppliers will be able to see this memo. Describe what this order is and who it is for. Any internal notes can be added.

11. **Edit Default Worktags**
    - **Shortcut** - To edit all line items once, click the **Related Actions button** and select **Edit Requisition Defaults**.
    - **For a demo, view the video tutorial** [Edit Ship-To & Default Worktags](#).

12. **Attachments**
    a. A quote is required for Ad-hoc orders.
    b. Attach additional supporting documentation.

**Review and Submit**
   a. Once all errors are corrected, the message will still appear and the requisition can be submitted.
   b. To prompt the first approver, click **Submit**. If there are no errors, the first approver’s name will appear.
### Check the Status of a Requisition

Find the requisition and view the Process History.

1. Log into Workday.
   ```
   http://workday.miami.edu
   ```

2. Click **Purchases**.

3. From the **View** section, click **Requisitions**.

4. Adjust the search filters as needed:
   - **Company** – (blank) Click “X” to view all reqs.
   - **Document Date On Or After** – select a date
   - **Supplier** – Search for the supplier’s name
   - **Exclude Cancelled** - uncheck
   - **Exclude Closed** - uncheck
   - Click **OK**.

5. Review the Requisition Status.
   - **Draft** – not submitted
   - **Cancelled** – the req has been cancelled
   - **Closed** – approved, a PO has been issued
   - **In Progress** – pending approval

6. To view pending approvers, click the requisition number.

7. Scroll down and open the **Process History**.

8. Scroll down to view the person **Awaiting Action**.

To view additional tutorials, visit our website at [www.purchasing.miami.edu](http://www.purchasing.miami.edu). For additional assistance contact us at purchasinghelpdesk@miami.edu.