Creating a Purchase Requisition for Non-Catalog Goods

Use this tutorial to create a purchase requisition for goods that do not appear in the UMarketplace catalog.

http://workday.miami.edu

Creating a Purchase Requisition for Non-Catalog Goods – Before creating a requisition, contact the supplier to obtain a quote. It is not recommended to pull pricing off the internet due to frequent price changes which may require a change order.

1. Click the Purchases icon.

2. Click Request Non-Catalog Items.

3. Complete the fields.
   
   **TIP:** In the Ship-To field, replace Accounts Payable with the shipping address.

   **TIP:** Type either a Program, Grant, Gift or Project number. Split accounting can be applied on the Summary page, before submitting the requisition.

   **TIP:** The remaining fields on this page will auto-populate.

4. Click Ok.

   **TIP:** Complete the following screen for each item listed on the quote. For example, if the quote contains three items, complete this screen three separate times.

5. Select Request Goods.

   **TIP:** A requisition can contain both goods and services. For example, a projector would be a good and installation of the projector would be a service.
6. Complete the Goods Request Details screen.
   - **Item Description** – Type the quote number and describe the item as it appears on the quote. Type any other information such as scope of work.
   - **Supplier Item Identifier** – (Type the item #/ID that appears on the quote.)
   - **Spend Category** – (Common Spend Categories)
   - **Supplier** – (The supplier’s “remit to” information on the quote should match the supplier’s information in UMarketplace.)
   - **Supplier Contract** (leave blank)
   - **Unit Cost** – (price per unit)
   - **Unit of Measure** – (i.e. each, box, pack, kit)
   - **Extended Amount** - (Quantity x Unit Cost)
   - **Memo** - (Optional) Provide details regarding the order such as a general description of what the item is and who will be using it.

7. Click **Add to Cart**.

8. To add another item, complete step 6 again and click **Add to Cart**.

9. To check out click the shopping cart icon.

10. Click **Checkout**.

11. Review the **Summary** page information.
12. Attach the quote and any other supporting documentation.

13. Click **Submit** to begin the approval process. The requisition number will appear. (i.e. RQ-0000123456)

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**Checking the Status of a Purchase Requisition**

14. Click the **Purchases** icon.

15. Click **Requisitions**.

16. Use the search filters to find the requisition.

*TIP: Document Date On or After* – Adjust to go as far back as needed.

*TIP: Exclude Cancelled* – (leave unchecked)

*TIP: Exclude Closed* – (leave unchecked)

Click **OK** to run the search.

17. Find the requisition and view the **Request Status**.

- **Draft** = Not submitted or it was sent back by an approver
- **In Process** = Currently pending approval(s)
- **Closed** = Completely approved and a purchase order has been opened
- **Cancelled** = The requester has cancelled the requisition