Creating a Non-Catalog Purchase Requisition (Req)

Use this tutorial to request a purchase order (PO) for non-catalog goods and/or services.

View the full Purchase Order Process.

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Example: RQ-0000#### is a request to purchase goods and/or services with UM funds. If fully approved, the req will close, and a PO will be issued.

Before Creating a Req

Gather the following information:

- **Catalog vs. Non-Catalog** - Be aware suppliers with catalogs in UMarketplace, may only accept catalog POs. E.g., Staples, VWR, Canteen.

- **Quote** - Using the supplier’s contact information in UMarketplace, contact the supplier to obtain a quote. **Tip:** Due to frequent price changes, instead of pulling pricing off the internet contact the supplier for a quote. Outdated pricing may require a change order and full re-approval.

- **Driver Worktag** (E.g., PG00### or GR00####) and the corresponding UM Company (E.g., 200 Academy or 500 MSOM)

- **Spend Category**

- **Shipping Address** – Building name, physical address, and room number

Creating a Req

1. Log into Workday [https://workday.miami.edu](https://workday.miami.edu)
2. Click the Purchases icon.
3. Click Request Non-Catalog items.
4. Complete the fields with your information.

**Important:** In the Ship-To field, replace Accounts Payable with the needed shipping address.
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<table>
<thead>
<tr>
<th><strong>TIP:</strong> Type either a Program, Grant, Gift or Project number. Split accounting can be applied later, on the Summary page before submitting the requisition.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TIP:</strong> The remaining fields on this page will auto-populate.</td>
</tr>
<tr>
<td><strong>TIP:</strong> Before adding items to the cart, note if any discounts appear that may need to be applied to the line-item pricing. E.g., if &quot;10% UM discount&quot; appears at the bottom of the quote, apply the 10% off to each line item. Then, the total PO amount will match the quoted total amount.</td>
</tr>
<tr>
<td><strong>Important:</strong> To itemize, repeat this step for each item listed on the quote with separate pricing. For example, if the quote contains three items with pricing, complete this step three separate times.</td>
</tr>
</tbody>
</table>

5. **To add the first line item to the cart, select either Request Goods or Request Service.**

   **Important:** If the item will be invoiced more than once, select Request Service. Selecting goods may result in needing to create another requisition or initiating a change order before payments can be processed.

   **Non-Catalog Request Type**
   - Request Goods
   - Request Service

   **TIP:** A requisition can contain both goods and services. For example, a projector would be a Good, whereas installation of the projector would be a Service.

### Services
- **Description** – Type the quote number and the description of the first line item, as it appears on the quote. Type any other information such as scope of work.
- **Spend Category**
- **Supplier** – Important: The supplier’s contact information in the quote must match the supplier’s contact information in UMarketplace.
- **Supplier Contract** – (leave blank)
- **Start Date** - (date of service or today’s date)
- **End Date** - (date of service or today’s date)
- **Extended Amount** – (total amt. for this item)
- **Memo** - (Optional) E.g., General description of what it is and who it is for, payments such as deposits, and other relevant information. See example on next page.

### Goods
- **Item Description** – Type the quote number and the description of the first line item, as it appears on the quote. Type any other information such as scope of work.
- **Supplier Item Identifier** – Type the item # that appears on the quote.
- **Spend Category**
- **Supplier** – Important: The supplier’s contact information in the quote must match the supplier’s contact information in UMarketplace.
- **Supplier Contract** – (leave blank)
- **Quantity** – (as it relates to the Unit Cost)
- **Unit Cost** - (price per unit)
- **Unit of Measure** (E.g., each, box, pack, kit)
- **Extended Amount** (See Quantity x Unit Cost)
- **Memo** - (Optional) E.g., Describe what it is and who it is for, payments such as deposits, and other relevant information.

**Click Add to Cart.** Repeat for each additional goods or services item.

**Tip:** See examples on next page.
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<table>
<thead>
<tr>
<th>Service Request Details</th>
<th>Goods Request Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Item Description</td>
</tr>
<tr>
<td>1. Quote 123456, embroidery: name (Dr. Jimenez) and UM logo. $10 for both lab coats</td>
<td>2. Quote #123456, Medium lab coats</td>
</tr>
<tr>
<td>Spend Category</td>
<td>Supplier Item Identifier</td>
</tr>
<tr>
<td>X SC08117 - Cost of Uniforms</td>
<td>Style 1095</td>
</tr>
<tr>
<td>Supplier</td>
<td>Spend Category</td>
</tr>
<tr>
<td>X UNIFORMS DIRECT, INC.</td>
<td>Supplier</td>
</tr>
<tr>
<td>Supplier Contract</td>
<td>Supplier Contract</td>
</tr>
<tr>
<td>08/26/2023</td>
<td>08/28/2023</td>
</tr>
<tr>
<td>End Date</td>
<td>Start Date</td>
</tr>
<tr>
<td>20.00</td>
<td>2</td>
</tr>
<tr>
<td>Extended Amount</td>
<td>Quantity</td>
</tr>
<tr>
<td>Memo</td>
<td>Unit Cost</td>
</tr>
<tr>
<td></td>
<td>60.00</td>
</tr>
<tr>
<td></td>
<td>Unit of Measure</td>
</tr>
<tr>
<td></td>
<td>X Each</td>
</tr>
<tr>
<td></td>
<td>Extended Amount</td>
</tr>
<tr>
<td></td>
<td>120.00</td>
</tr>
<tr>
<td></td>
<td>Memo</td>
</tr>
<tr>
<td></td>
<td>For Dr. Jimenez</td>
</tr>
</tbody>
</table>

6. After all items have been added to the cart, click the shopping cart icon. (upper right)

7. To remove any unwanted items in the cart, click View Cart.
   Or
   To continue processing the req, click Checkout.

8. To attach the quote and any additional supporting documentation, click Attachments, then Select files.

   **Tip:** To upload additional documents, click Upload.
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9. Click **Submit** to begin the approval process. The requisition number will appear. (E.g., RQ-0000123456)

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**Checking the Req Status**

For instructions, view the [Checking Requisition Status](#) tutorial.