Goods in UMarketplace/Workday (Catalogs)

http://workday.miami.edu

Find the Purchases Portlet and Leave

1. Log into Workday and click the Purchases worklet

2. Click Connect to Supplier Website.

3. Click Connect.

Leave Workday / Enter UMarketplace (catlogs)

4. Go to Showcases and select the catalog (Ex: Paramount)

5. Add items and click Transfer Your Order.
   HINT: Each catalog may have a different checkout button such as Checkout, Punchout, Transfer Order or Submit.

6. Name This Cart. This will help distinguish this order from all other orders.

7. Click View Cart Details.

Leave UMarketplace / Transfer Cart To Workday

8. Click Send to Workday.
9. Review the shopping carts. To delete an item, select it and click the trash icon. HINT Multiple shopping carts may appear.

Click Checkout.

**Checkout: Edit Shipping Address, Requisition Type, Attachments, Review and Submit**

10. The Checkout screens contain the following sections:
- **Shipping Address**
- **Information**
- **Attachments**
- **Review and Submit**

**Shipping Address Tab**

To change the ship to address, click the stacked lines icon and search for the correct address.

Check Apply Ship-To Address Changes to All Lines.

Note, the **Use Alternate Address** needs to be left blank. To load an address into Workday, contact the data entry team at 305-284-5751.

Click Next.

**Information Tab**

Choose a **Requisition Type**.

- **Sourcing Buyer** – Leave blank.
- **High Priority** – Leave blank. If the order needs special attention, contact the approvers as needed.
- **Memo to Supplier** – Leave blank. Many vendors don’t receive these notes. For special instructions, wait for the requisition to get completely approved, then contact the vendor with the PO # and instructions.

Click Next.
**Attachments Tab**
Drag and drop or click **Select files.** Attachments documents as needed.

**Review and Submit Tab**
Upon entering the screen, **Errors** and **Alerts** appear. Once all fields are corrected, the messages will remain but the requisition can be submitted. **HINT:** Work left to right. **If the errors still appear after completing all fields, try deleting information in ALL editable fields. Then fill them in again.**

Scroll down to the section **Goods** or **Services** depending on what is in your cart.

Complete the following fields for all line items.
- Spend Category (former “sub object code”)
  Ex SC08234 – Gas Cylinders; For assistance, view the FRS/FDM
  See Conversion Tool below.
- Requested Delivery Date (optional)
  **HINT:** Type the room number and click enter.
- Ship-To Address (physical address + room)
- Ship to Contact (employee name)
- Deliver to (room number)
- Memo (optional)
- Program, Grant, Gift or Project
- Cost center and additional worktags will autopopulate.

11. Click **Submit.** The pending approver appears.

12. To view more requisition details click **Details and Process.**

13. Click **Process** (former “History”) to view the requisitions
   history and Purchase Order.

14. Click **Done.**
### Common Spend Category Conversions

*Note, the FRS/FDM Conversion Tool is not compatible with Internet Explorer. To access the FRS/FDM Conversion Tool, please use either Microsoft Edge, Mozilla Firefox, Google Chrome, or Apple Safari. FRS/FDM Conversion Tool is not recommended for use on mobile devices.*

http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html

<table>
<thead>
<tr>
<th>Sub Object and Description</th>
<th>Spend Category and Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3233 Chemical</td>
<td>SC08200 Chemicals</td>
</tr>
<tr>
<td>3218 Clerical Supplies</td>
<td>SC08218 Clerical Supplies</td>
</tr>
<tr>
<td>3229 Copy / Pub /Print-Supplies</td>
<td>SC08229 Photocopy, Publishing, &amp; Printing Supplies</td>
</tr>
<tr>
<td>3223 Equipment Supplies</td>
<td>SC08203 Equipment Supplies (non-housekeeping)</td>
</tr>
<tr>
<td>3213 Food Supplies</td>
<td>SC08208 Food Supplies</td>
</tr>
<tr>
<td>3619 Meetings -Subsistence</td>
<td>SC08619 Food / Beverage during the a business meeting</td>
</tr>
<tr>
<td>3623 Food Service</td>
<td>SC08623 Food Service – Interdepartmental UM Dining Services</td>
</tr>
<tr>
<td>3624 Entertain - FoodBevRec</td>
<td>SC08624 Entertainment – Food, Beverage, Reception</td>
</tr>
<tr>
<td>3225 Technical Supplies</td>
<td>SC08225 Technical Supplies Other</td>
</tr>
<tr>
<td>3811 Other Outside Svcs.</td>
<td>SC08811 Outside Services</td>
</tr>
<tr>
<td>5904 Printing</td>
<td>SC08229 Photocopy, Publishing, &amp; Printing Supplies</td>
</tr>
<tr>
<td>5105 Non Food Supplies</td>
<td>SC08621 Goods Services for Personal Use</td>
</tr>
<tr>
<td>3219 Instructional Supplies</td>
<td>SC08219 Instructional Supplies</td>
</tr>
<tr>
<td>4268 Managed Equip Maintenance</td>
<td>SC08047 Managed Equipment Maintenance</td>
</tr>
<tr>
<td>3800 Hotel Conf &amp; Seminars</td>
<td>SC08800 – Hotel Conferences &amp; Seminars</td>
</tr>
<tr>
<td>5105 Non Food Supplies</td>
<td>SC08621 Goods Services for Personal Use</td>
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