Creating a Catalog Requisition (Req) in UMarketplace

Use this tutorial to request a purchase order (PO) for catalog goods.

View the full Purchase Order Process.
https://workday.miami.edu

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Example: RQ-0000###### is a request to purchase catalog goods 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
• Driver Worktag (E.g., PG00#### or GR00####) and the corresponding UM Company (E.g., 200 Academy or 500 MSOM)
• Spend Category E.g., SC08218 - Clerical Supplies
• Shipping Address – Building name, physical address, and room number

Creating a Req
1. Log into Workday.
   https://workday.miami.edu
2. Click the Purchases icon.
   Tip: Company 500 (MSOM) requisitions may need to be started by typing Create Req in the search box. View the MSOM tutorial.
3. Click Connect to Supplier Website.
4. Complete the fields with your information.
   Important: The Company field cannot be edited later. Instead, a new requisition may need to be created.
   Tip: For the Deliver-To field, type only the building name, followed by a space, then the room number. Tap the Enter key to search. E.g., Gables One 400.34
   Tip: For the Ship-To field, remove Accounts Payable and type only the street address, followed by a space, then the room number. Tap the Enter key to search. E.g., 1320 400.34
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| **TIP:** Type either a Program, Grant, Gift or Project number. Split accounting can be applied later, on the Summary screen, before submitting the requisition. |
| Program: PG000999 Director University Purchasing |
| Grant: |
| Gift: |
| Project: |

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

5. Click **Connect**.

6. From the Showcases section, find the supplier’s catalog. **Important:** Once in the catalog, end users have 15 minutes to shop and return the cart back to UMarketplace. Going over the time limit may result in having to find and add items again.

7. Add items to the cart and checkout. **Tip:** Verbiage in each catalog may differ. E.g., “Checkout,” “Punchout,” “Return Cart,” “Send to Workday,” or “Return to Workday”

8. From UMarketplace, click View Cart Details.

9. Click **Send to Workday**.

10. Review the shopping cart.

    **TIP:** Items from previous shopping sessions may appear. To delete an item, select it on the left, and click the trash icon.

11. Click **Checkout**. The Checkout screen will appear.

12. **High Priority** (optional) Checking **High Priority** does not change the order in which the req is processed.

13. **Sourcing Buyer** – (leave blank)
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<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td><strong>Memo to Suppliers</strong> – (optional)&lt;br&gt;&lt;br&gt;<strong>Important:</strong> Some suppliers do not receive this information. To provide suppliers with special instructions, wait for the PO to be issued. Then contact the supplier with the PO number and instructions.</td>
</tr>
<tr>
<td>15.</td>
<td><strong>Internal Memo</strong> – (optional)&lt;br&gt;Describe what is being ordered and for whom.</td>
</tr>
<tr>
<td>16.</td>
<td><strong>Spend Category</strong>&lt;br&gt;E.g., SC08218 - Clerical Supplies</td>
</tr>
<tr>
<td>17.</td>
<td><strong>Attachments</strong> – (optional)&lt;br&gt;A quote is not required for catalog orders. E.g., Internal email request to purchase these specific goods.</td>
</tr>
<tr>
<td>18.</td>
<td>Review the Goods line(s) and delivery information.&lt;br&gt;&lt;br&gt;<strong>TIP:</strong> To update the deliver information refer to the <a href="#">Edit the Ship-To Address &amp; Default Worktags</a> tutorial.</td>
</tr>
<tr>
<td>19.</td>
<td>Click <strong>Submit</strong> to begin the approval process.</td>
</tr>
</tbody>
</table>

## Checking the Req Status

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

For questions or a quick walkthrough, contact [PurchasingHelpDesk@miami.edu](mailto:PurchasingHelpDesk@miami.edu).