# Workday Services Non-Cat

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 a Non-Catalog Service

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. Log into Workday.

2. Click the **Purchases** worklet.

3. Click **Request non-catalog items**.

4. 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.

5. 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.

6. Select **Request Service**.

   **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.

7. **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.

8. **Spend Category** – (Common Spend Categories)

### Fields

- **Company**
- **Requester**
- **Currency**
- **Requisition Type**
- **Deliver-To**
- **Ship-To**

### Example

- **Company**: 200 Academy ...
- **Requester**: Michelle Roy ...
- **Currency**: USD
- **Requisition Type**: Service Contract/Quote
- **Deliver-To**: Gables One Tower > Floor 04 > Room 400.34
- **Ship-To**: 1320 S Dixie Hwy Gables One Tower 400.34 Coral Gables, FL 33146-2926 United States of America

### Tips

- Complete each item listed on the quote.
- Submit the requisition when complete.

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Department of Purchasing

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9. **Supplier** – (The supplier’s “remit to” information on the quote should match the supplier’s information in UMarketplace.)

10. **Supplier Contract** (leave blank)

11. **Start Date** (The beginning date of service or today’s date)

12. **End Date** (The ending date of service or 1 month from today)

13. **Extended Amount**

14. **Memo** (Optional – Type additional information such as what this service is and who it is for.)

15. Click **Add to Cart**.

   *TIP:* To add another line item, complete steps -6-14 again.

16. To check out click the shopping cart icon.

17. Click **Checkout**.

18. Review the **Summary** page information.

19. Attach the quote and any other supporting documentation.

20. 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**

1. Click the **Purchases** icon.

2. Click **Requisitions**.
3. 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.

4. 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