Workday Services Non-Cat

http://workday.miami.edu

Request Non-Catalog Catalog Item(s)

1. Click the Purchases worklet.

2. Click Request non-catalog items.


4. Item Number – If the supplier quote has an item number, type it here.

5. Description - Describe the item, quote number, and any other information such as scope of work.


7. Supplier – Find a corresponding Supplier.

8. Memo - (Optional) Provide any other details regarding the order such as who requested the item and what it is for.

9. Click Add to Cart.
   To add another line item, complete steps 3-9 again.

10. To begin the checkout process, click the shopping cart icon in the upper right corner.

11. Remove any items that are not ready to be checked out.

12. Click Checkout
13. A confirmation screen will appear. Click OK.

14. To delete a line item, select the corresponding line, and click the trash icon on the right hand side.

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

**Shipping Address Tab**

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

17. Check Apply Ship-To Address Changes to All Lines.

*Never check this box. To add an address, email help@miami.edu.*

18. Click Next.
**Information Tab**
19. Requisition Type – Select **Service** or **Service Contract**.

20. **Sourcing Buyer** - Leave blank.

22. **Memo to Suppliers** – Note many vendors will not receive this information. Contact them directly with any specific instructions.

23. Click **Next**.

**Attachments Tab**
24. Drag and drop the quote and attachments into the section **Drop files here** or click **Select files**.

25. Click **Next**.

**Review and Submit Tab**
26. Upon entering this screen, errors and alerts will appear. Once all fields are completed click **Submit**.

27. Complete the **Spend Category** (formerly sub object) field for each line item. Copy and paste for each line item.

28. Scroll to the right and complete the Worktag Driver: **Program, Grant, Gift, or Project**. Copy and paste into each line item.
29. Click **Submit**. The current approver’s name will appear. Click **Done**.

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**Checking the Status of a Purchase Requisition**

30. Click the **Purchases** worklet.

31. Click **Requisitions**.

32. Use the search filters to find the requisition. OR Click **OK** to see all requisitions within the designated date range.

33. Scroll down to the requisition and check the **Request Status**.
The FRS/FDM Conversion Tool may be useful for finding the Spend Category (formerly sub object code) and Driver Worktag. This is not compatible with Internet Explorer or mobile devices. To access the FRS/FDM Conversion Tool, please use either Microsoft Edge, Mozilla Firefox, Google Chrome, or Apple Safari. [http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html](http://workday-finance.it.miami.edu/resources/frs-to-fdm/index.html)

<table>
<thead>
<tr>
<th>SUB OBJECT CODES</th>
<th>SPEND CATEGORIES</th>
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<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>
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<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 charges for catering from UM Dining Services</td>
</tr>
<tr>
<td>3624 Entertain - FoodBevRec</td>
<td>SC08624 Entertainment – Food, Beverage, Reception</td>
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<tr>
<td>3234 Gas Cylinders</td>
<td>SC08234 Gas Cylinders</td>
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<tr>
<td>3800 Hotel Conf &amp; Seminars</td>
<td>SC08800 – Hotel Conferences &amp; Seminars</td>
</tr>
<tr>
<td>3219 Instructional Supplies</td>
<td>SC08219 Instructional Supplies</td>
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<tr>
<td>4268 Managed Equip Maintenance</td>
<td>SC08047 Managed Equipment Maintenance</td>
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<tr>
<td>5105 Non Food Supplies</td>
<td>SC08621 Goods Services for Personal Use</td>
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<tr>
<td>3811 Other Outside Svcs.</td>
<td>SC08811 Outside Services</td>
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<tr>
<td>5904 Printing</td>
<td>SC08229 Photocopy, Publishing, &amp; Printing Supplies</td>
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<tr>
<td>3227 Promotional Materials</td>
<td>SC08227 Promotional Materials</td>
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<tr>
<td>3225 Technical Supplies</td>
<td>SC08225 Technical Supplies Other</td>
</tr>
</tbody>
</table>