Creating a Standing Purchase Order

Use this guide to create a single purchase order for a recurring service during fiscal year 2024. Exceptions are made for Airgas and Iron Mountain, which can be extended beyond a single fiscal year. For goods, create separate requisitions for each shipment.

https://workday.miami.edu

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Creating a Purchase Requisition – Begin by creating a Purchase Requisition. Once the requisition is completely approved, it will automatically close and a Purchase Order will be issued.

**TIP:** For company 500, begin orders as directed in Purchasing for Company 500.

1. From the Workday home page, click Purchases.
2. Click Request Non-Catalog Items.
3. Complete the fields, working from top to bottom.

   **TIP:** This screen may not appear if items are already in the shopping cart from an earlier requisition.

   **Important:** The Company field cannot be edited after this screen.

   **TIP:** Requisition Type field – Select Standing Order.

   **Important:** Ship-To field - Replace Accounts Payable with the correct shipping location.
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4. Select Request Service.

5. Complete the Service Request Details.

**TIP:** Description: (List the service being provided.)

**TIP:** Frequently Used Spend Category

**TIP:** Extended Amount – (Estimate the total dollar spend for this fiscal year. To increase the dollar amount, a change order can be initiated as needed.)

6. Click Add to Cart.

7. Click the shopping cart icon, found in the upper right corner.

8. Click Checkout.

9. Attach supporting documents such as quotes and previous invoices that exhibit a range of low and high usage.

10. Click Submit to begin the approval process.
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Tracking a Purchase Requisition – Review the status and approvals. Once all approvals are obtained, a purchase order will be issued.

Review the **status** of the requisition.

*Tip:* If the requisition status appears as *In Progress*, the pending approver(s) can be viewed in the *Process History*.

<table>
<thead>
<tr>
<th>Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Progress</td>
<td>60,564.00 USD</td>
</tr>
</tbody>
</table>

| Service Lines | Attachments | Process History |

<table>
<thead>
<tr>
<th>Approval by Principal Investigator</th>
<th>Approved</th>
<th>Sebastian Bis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Requisition</td>
<td>Not Required</td>
<td></td>
</tr>
<tr>
<td>Approval by Cost Sponsored Programs Manager</td>
<td>Awaiting Action</td>
<td>Gertrude Bis</td>
</tr>
</tbody>
</table>

Invoicing – Suppliers generally submit invoices directly to AP (UM Accounts Payable). Should a department receive an invoice, payment will only occur if the invoice is sent to AP for processing using the following steps.

1. Should the department receive an invoice, open the requisition. **Find the PO number** on each line item.

2. Submit the **invoice to Accounts Payable** to begin processing the payment.

For questions regarding creating and tracking a purchase requisition, contact **PurchasingHelpDesk@miami.edu**

For questions regarding payments, contact **Accounts Payable**.