Overview

Effective February 23, 2023, for contract requests requiring a Workday purchase order, requesters will initiate a purchase requisition in Workday and wait for the purchase requisition to route through financial approvals. Once all financial approvals are completed in Workday, the Workday-to-Conga integration will run and a Draft contract request will be created in Conga Contracts. Multiple fields will be pre-populated, reducing the amount of data the requester must manually enter in Conga Contracts. Once the integration is triggered, the requester will receive an email automatic notification prompting them to log into the Conga system and complete their request; this notification will have instructions to facilitate the submission.

Step-by-Step Instructions

1) Log into Workday (workday.miami.edu) and create a Purchase Requisition. Attach relevant contract documents (statement of work, quote, proposed agreement, etc.)

2) Once all financial approvals are completed in Workday, the Requisition will route to the appropriate procurement team, who will ensure the Workday-to-Conga integration runs.

3) The integration between the systems will create a Draft contract request in Conga Contracts.

4) The Requester may receive up to two automatic Conga email notifications:

   ➢ #1: If, at the time the integration runs, the supplier is not in Conga, which may occur from time-to-time with new suppliers who have just gone into Workday, the requester will receive a communication advising them to await second notification while supplier is being loaded. Generally, this occurs within several hours. This situation will be rare.

   ➢ #2: Once the Draft contract request is in Conga Contracts, the Requester will receive an email requesting that the requester log into Conga to complete the request form that is in draft. The requester should click the link provided in the email. They will be routed to their Conga requests screen. The requester can also reach this screen by logging directly into Conga at conga.miami.edu.
5) From the My Requests screen, locate the Draft contract request associated with your Workday purchase requisition.

**TIP**: Sort by descending date order to view the most recent request first.

6) **Important**: DO NOT click “New Request” unless directed by a Purchasing buyer. The forms appearing under “New Request” will not contain any auto-populated Workday information.

7) Find and select the green check mark to navigate to the Draft request form.

**TIP**: To view all columns, scroll to the right.

8) When the request form opens, complete all required fields in the request form.

**Note**: The supplier name and the fields in the Workday Information section of the request form have been pre-populated, reducing the amount of data that the Requester must manually enter in Conga Contracts.
9) Once complete, the Requester should **click Submit Request**.

![Submit Request Button]

10) Once the Request Form is submitted, the procurement team assigned to the contract will review the request, and the contract negotiation stage can begin.

11) Requesters can view the status of their contract request at any time by locating the Status field on the Contract Profile. For example:

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Status: Pending Contract Owner Assignment
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12) For questions about the contracting process, [click here](#) to review FAQs.