

Workday-to-Conga Processing Updates

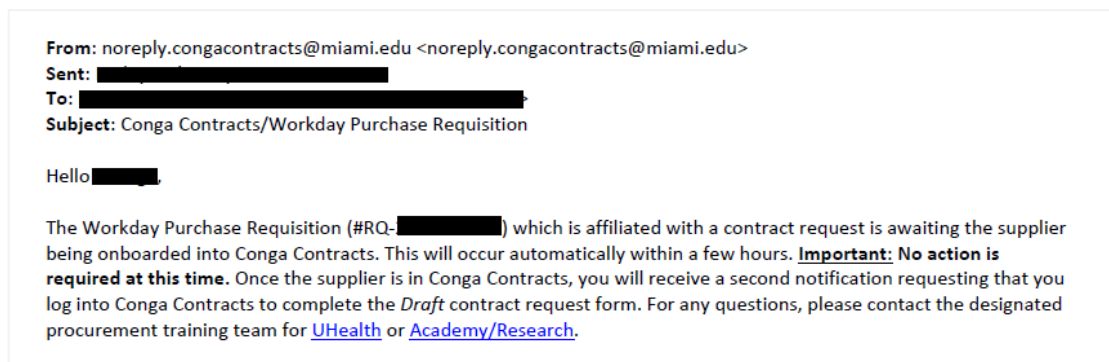
Last Updated: February 16, 2023

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.

From: noreply.congacontracts@miami.edu <noreply.congacontracts@miami.edu>
Sent: [REDACTED]
To: [REDACTED]
Subject: (Action Required) Conga Contracts/Workday Purchase Requisition

Hello [REDACTED],

A contract request associated with your Workday Purchase Requisition (RQ-[REDACTED]) has been created in Conga Contracts. Please follow the steps below to complete the *Draft* contract request form. Your contract request will remain in *Draft* mode in Conga Contracts until you have submitted the contract request form. **Important: Negotiation of your contract cannot begin until you have completed this step.**

To Complete and Submit Your Contract Request:

1. Log into [Conga Contracts](#).
2. From the *My Requests* screen, locate the *Draft* contract request associated with your Workday purchase requisition via the *Created On* and *Company Name* columns. **TIP:** Sort your view by descending date order to view recent requests first.
3. Find and select the green check mark to navigate to the Draft request form. **TIP:** To view all columns, scroll to the right.
4. Complete the requested information and review for accuracy.
5. When finished, click the **Submit** button.

For any questions, please contact the designated procurement training team for [UHealth](#) or [Academy/Research](#).

- 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.

Request Type	Company Name	Request Status	Created On	Request Bundle Number	Request Number	Submitted On
Workday ...	LONGVIEW US HOLDINGS, INC. DBA TM SOFTWARE LLC (SUPPLIER)	Draft	01/24/2023 16:21:17	00004373	00004373-01	...
Workday ...	CLINISYS, INC. (SUPPLIER)	Draft	01/24/2023 16:19:31	00004371	00004371-01	...

- 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.

Request Type Name	Request ...	Company Name	Created On
Workday-Initiated Request Form	Draft	JENNY ABREU (SUPPLI...	02/02/2023 16:10:10
Workday-Initiated Request Form	Accepted	JENNY ABREU (SUPPLI...	06/21/2021 17:13:10

- 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.

Workday-Initiated Request Form
 This form is to be used for requests that have not been initiated in Workday.
 Request Bundle Number: 00004373

Company Name
 Please type in a new or existing company name and hit enter. Otherwise, select the drop-down button to browse and search for a company name.
 LONOVIEV US HOLDINGS, INC. DBA TM SOFTWARE LLC (SUPPLIER) Browse

Workday Test Request Form
 Request Number: 00004373-01

Contract Purpose: ❗ This field is required

Agreement Type: -- No Value Selected -- ❗ This field is required

IF YOU ARE SUBMITTING A BUSINESS ASSOCIATE AGREEMENT OR DATA PROCESSING AGREEMENT PLEASE USE THE BUSINESS ASSOCIATE AGREEMENT/DATA PROCESSING ADDENDUM REQUEST FORM.

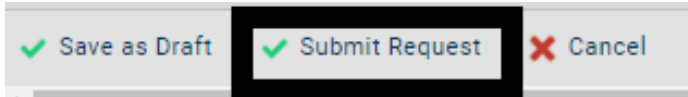
Request Date: 02/16/2023 ❗ This field is required

University Division: -- No Value Selected -- ❗ This field is required

Department: -- No Value Selected -- ❗ This field is required

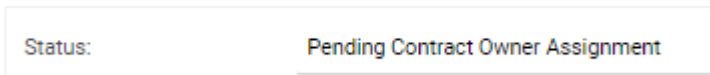
Security and Privacy Information

9) Once complete, the Requester should **click Submit Request**.



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:



12) For questions about the contracting process, [click here](#) to review FAQs.