

Research Workday Town Hall

January 11, 2024

Research Workday Town Hall Agenda

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- Current Match Exception Rules & Receiving Changes
- Effort Certification Status Update
- Workday Adaptive Budget Training
- Training Hub Redesign
- HR Town Halls
- Q&A

Match Exception Rules & Receiving Changes

P2P: Rule Changes for Invoicing, Match Exceptions, Receipts

The following changes (summary level) were moved to Production 12/12/2023.

- Raise match exception threshold from 2% to 5% and \$50 to \$150
- Require review and approval by supervisory org manager for over-receiving
- Require receipts according to the following table:

POs of \$10,000 or greater	POs of any dollar value
Blanket Order	Capital
Bulk Buy	GraphiteRX
Emergency	Inventory Replenishment
Equipment Rental	Tecsys Bill and Replace
Lease	Tecsys External Replenishment
Purchased Services	
Supplies	

Match Exception Resources

- Report Name: **Match Exception Invoice Lines by Cost Center**
 - Accessible to:
 - Cost Center Managers
 - Cost Center Financial Analysts
- Requisition creators should review exceptions in Workday within their requisition app regularly
- Procurement Training
- Procurement Office Hours



workday



Demo



Procure to Pay (P2P) Training & Office Hours

- **Purchasing & Receiving in Workday**

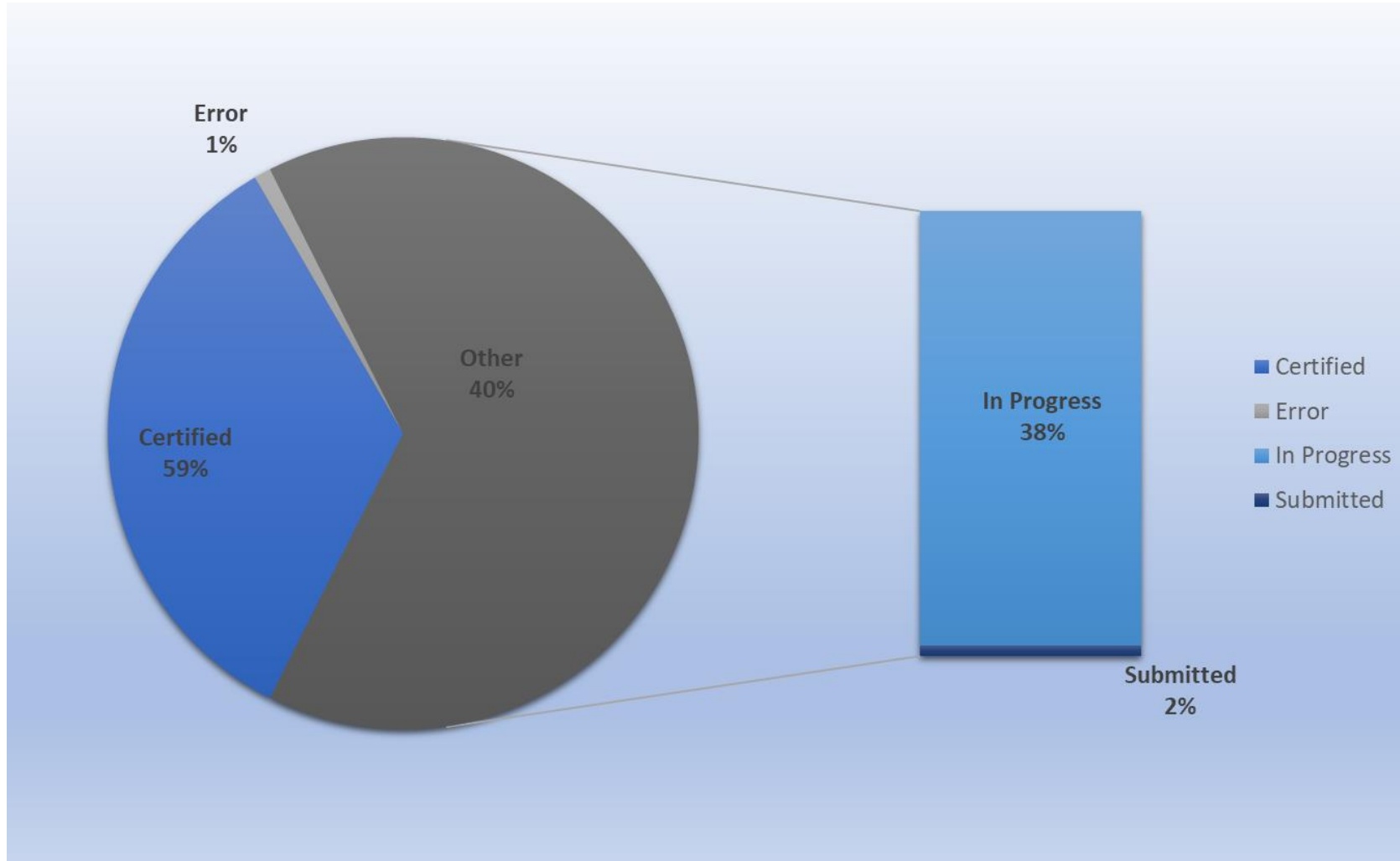
- Register in the LMS [here](#), or search "WDPurchasing"
- Upcoming Sessions:
 - Jan 16, 18, 23, & 30
 - Feb 8, 13, 20, 23, & 27

- **Office Hours**

- Thursdays, 3:00-4:00 PM
- Join [here](#)

Effort Certification Status Update

Effort Certification Status Update- THANK YOU!



Compliance – Federal Regulations and Institutional Practices

Effort Reporting and Certification in Workday

In accepting a federally-sponsored grant or contract, VUMC agrees to abide by certain federal rules and regulations regarding the use of the funds.

Please prioritize the any outstanding certifications in your work areas to target completion of our first certification by the **Friday, February 16th!**

Need assistance?

- Join TWICE daily office hours (links are available directly in the Effort Certification Reviewers teams channel under Posts)
- Contact vumc.effort@vumc.org to schedule a meeting with a team member who can assist with your questions



Institutional practice and expectation:

Regular effort conversations on a monthly, no less than quarterly, basis for all individuals with federal funding sources.

Workday Adaptive Budget Training

Workday Adaptive Planning

Budget Training Updates

Kickoff meetings scheduled 1/29

Hospitals and Clinics & MCA

Live, virtual sessions* begin 1/30-2/9

- 13 sessions H&C
- 5 sessions MCA

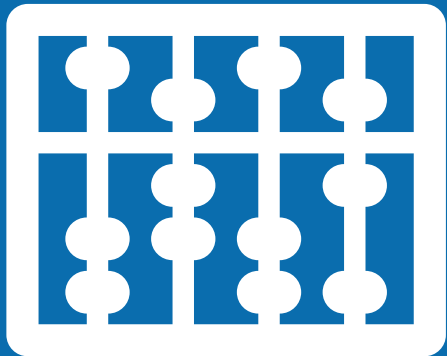
Drop-in Office Hours

- MWF 2/12-3/1 @ 11:30-12:30

Academic Enterprise & VMG

Live, virtual sessions* begin 1/29-2/9

Drop-in Office Hours TBD



*Enrollments begin
week of 1/8

Training Hub Redesign

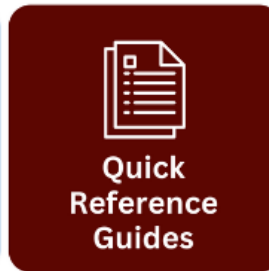
Training Hub Redesign

<https://vumc.org/myworkday/traininghub>

MyWorkday Implementation

[Welcome](#) **[Training Hub](#)** [Workday Word](#) [Change Network](#) [Communications](#) [New Releases](#)

TRAINING HUB



[Glossary of Terms](#) >

Glossary Questions

For questions about any items in the Glossary, or to recommend additions, please email WorkdayTraining@vumc.org.

Training Quick Links

[Town Halls and Workshops](#)

- [Upcoming Town Halls](#)
- [Research Town Hall Recordings](#)
- [Upcoming Workshops](#)
- [Workshop Recordings](#)
- [HR Town Hall Recordings](#)

[Security Roles & Guides](#)

[Quick Reference Guides](#)

- [Adaptive Planning \(Forecast, Budget, LRP\)](#)
- [Getting Started in Workday](#)
- [Human Resources \(HCM\)](#)

HR Town Halls

New: Workday HR Town Halls

- Monthly HR Town Halls, beginning this month
- Information and invites will be sent to the following security roles:
 - Managers
 - HCM Business Managers
 - HCM Business Assistants with Compensation
 - HCM Business Assistants without Compensation
- Town Hall recordings will be available on the Training Hub
- First town hall focus: Recruiting/Onboarding

Next Research Town Hall: February 15



Questions?