Create a Count Sheet (Desktop)

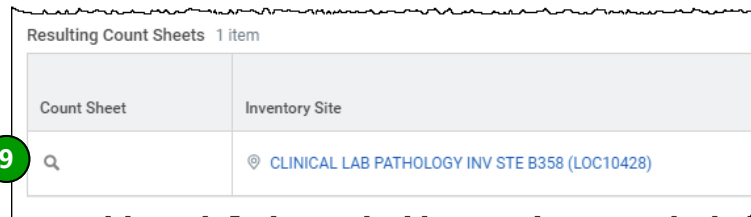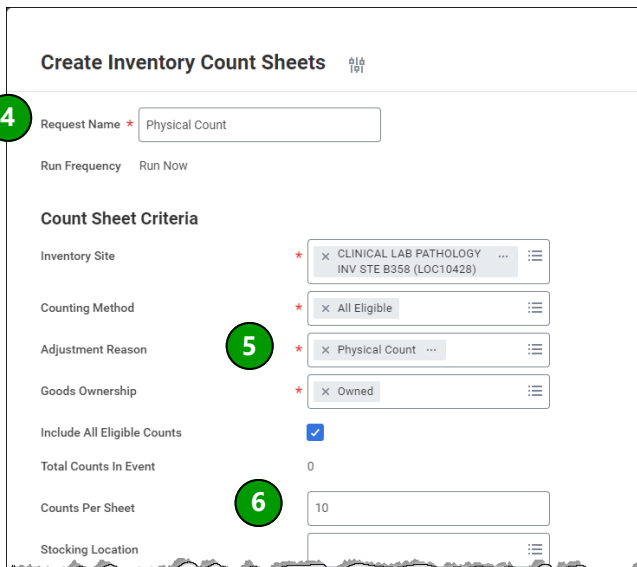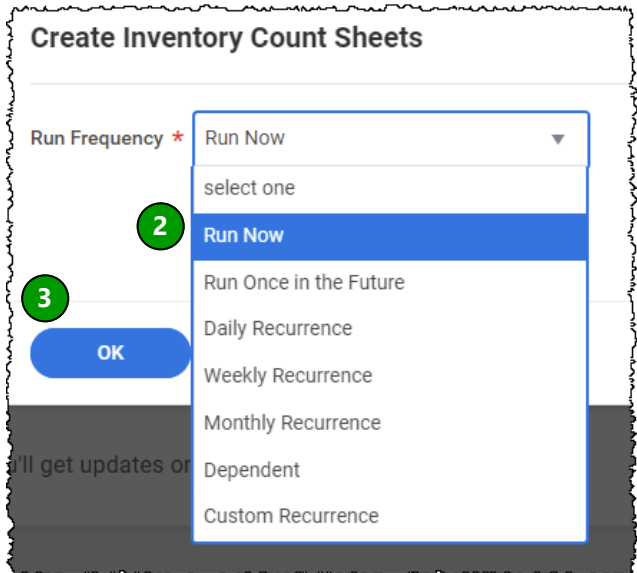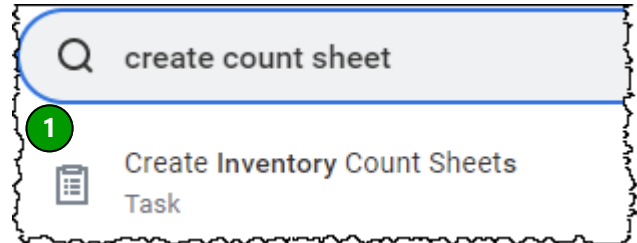Inventory count sheets can be created in Workday to schedule the automatic generation of lists for inventory item balances that need physical confirmation during the next count. These counts will occur periodically based on specific department needs. Prior to the completion of a physical count on a handheld device, a count sheet must be created on the Workday desktop application. Follow the steps below to complete the Create Inventory Count Sheets task.

Create a Count Sheet

1. Search **Create Count Sheet** task in the search bar.

2. Select the preferred **Run Frequency**.

3. Select **OK**.

4. Enter **Request Name** for the count Sheet.

5. Select **Physical Count** in the **Adjustment Reason** field.

6. Enter the necessary number of **Counts Per Sheet.** This field determines how many items will be separated onto each count sheet.

7. Enter the appropriate number into the **Last Count Day Greater Than** field to avoid counting items twice within a specific period.

8. Select **OK**.

9. Select **Magnifying Glass Icon** to view the count sheet.

10. View the **Count Sheet Document Number** which will be necessary for the Physical Count.

Create Inventory Count Sheets

Run Frequency * Run Now

- select one
- **Run Now**
- Run Once in the Future
- Daily Recurrence
- Weekly Recurrence
- Monthly Recurrence
- Dependent
- Custom Recurrence

OK

Create Inventory Count Sheets

Request Name * Physical Count
Run Frequency Run Now

Count Sheet Criteria

Inventory Site	* CLINICAL LAB PATHOLOGY INV STE B358 (LOC10428)
Counting Method	* All Eligible
Adjustment Reason	* Physical Count
Goods Ownership	* Owned
Include All Eligible Counts	✓
Total Counts In Event	0
Counts Per Sheet	10
Stocking Location	

Spend Category	
Last Count Day Greater Than	0
Days to Ignore Zero Balance Items	0
Include Items with Inventory Site Options Only	☐
Include Zero Balance Locations Only	☐

OK   Cancel

Resulting Count Sheets 1 item

Count Sheet	Inventory Site
🔍	⊙ CLINICAL LAB PATHOLOGY INV STE B358 (LOC10428)

View Inventory Count Sheet

Inventory Count Sheet 🔍   Document Number CS0000051

Submit a Physical Count (Handheld)

Physical Counts are counts of inventory in storage areas by hand that are submitted to Workday to ensure the system accurately reflects available inventory. After a count sheet has been created on the Workday desktop application, a Physical Count can be completed on a handheld device. The steps to complete this process are shown below.

Submit a Physical Count

1. Select the **Inventory** app.

2. Select the **Count Inventory Task**.

3. Choose the appropriate **Inventory Count Sheet** number that was created prior to the physical count (see Step 8 on Page 1).

4. Enter the counted quantity of each item. Check the **Zero On Hand** box if no items are on hand for a certain item number.

5. Select **Next Item**, and repeat for all items in the count sheet.

6. Review all items. Any items without a green check have not been entered into the count.

7. Select **Submit**. Once submitted, item quantities will be updated.
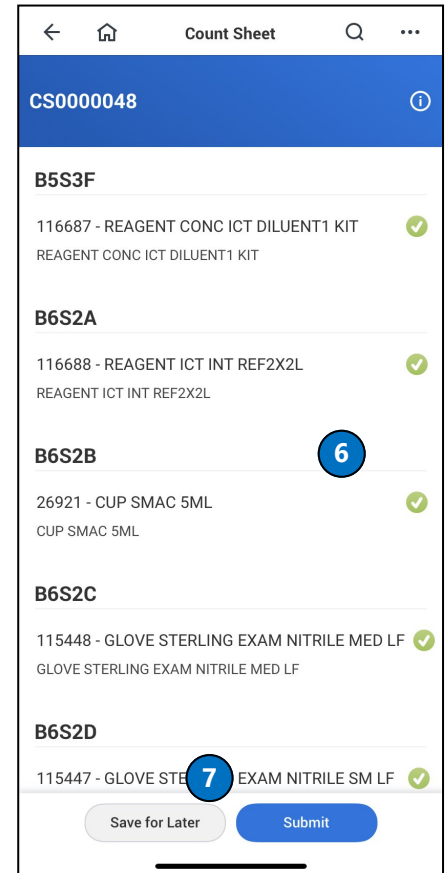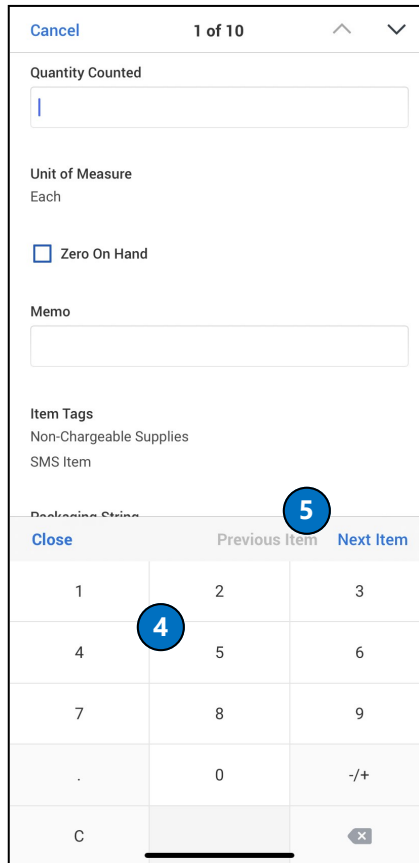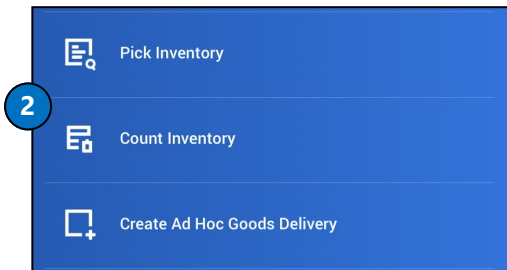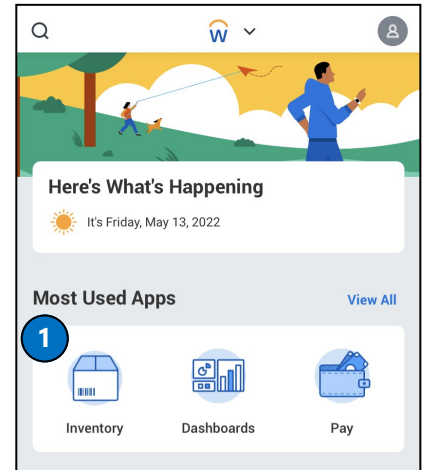
QUESTIONS?

Please email BusinessEducation@vumc.org.