

This is combined Q&A from the July 20 town hall, and the emailed pre-questions for the August 4 town hall. This does NOT include the questions submitted during the August 4 town hall.

Questions	Additional Details	Answers	Categories
How do I match the packing slips to invoices on blanket orders? My blanket orders are services but I also receive items.		As services are being fulfilled, you will need to create a receipt for the estimated value of what has been completed.	Blanket POs for goods and/or services
Please explain how to create a blanket order for gas cylinders, their rental and receipt of the cylinder. How will the rental be paid? Goods and supplies are not clearly understood by the labs.		Refer to the August 4 Town Hall materials for details on setting up blanket POs.	Blanket POs for goods and/or services
Yolanda, I believe you said blanket POs need to be marked at goods if quantity based and services if dollar amount based, did I hear that correctly? Are blanket POs for gas cylinders needing to be set up as services?		Refer to the August 4 Town Hall materials for details on setting up blanket POs.	Blanket POs for goods and/or services
how do we add on to a blanket PO each time we use it? do we create a new receipt or edit an existing receipt?		You will create a new receipt and adjust the quantity received at the Line Item Level for the items that have been delivered as they come in.	Blanket POs for goods and/or services
From Survey: There was a legacy blanket PO from eProcurement that was closed incorrectly in WorkDay after go live. Our grant is still encumbered for the full \$5,000 amount and no one has been able to answer me what has actually been paid even now. Could there be some focus put on the Legacy POs from the workday beginning to bring this issue to the forefront in case I'm not the only one who this has happened to?		Please provide the legacy PO number and we will research. Please also confirm if you have created a new Workday purchase order. Information can be sent to Yolanda Redmond	Blanket POs for goods and/or services
How can we get receive copies of invoices with itemization from vendors that are charging Standing POs? Right now in my WorkDay access I can see a list of invoices AL Gas wants to have approved but I have not received any invoices and I cannot review what these charges are for. Why are these vendors not sending invoices to us for review so we can quickly approve to get them payment? We can't just blanket blindly approve invoices without knowing what they are for. When we sign off on grants FFRs we are testifying that the charges attributed are true and accurate, so we need to see the invoices we are being asked to pay. And receiving a copy of the invoice would allow us to add a date/time/signature stamp to it that it's approved to pay so we can upload that to WorkDay as a receipt.		For non electronic invoices, we are in the process of attaching invoice copies to the Workday invoice for viewing. For electronic invoices (EDI), we do not receive hard copy invoices, but rather the electronic transmission of that information. If a hard copy invoice is needed, a request can be submitted to the vumcdisbursements@vumc.org email address for a hard copy of the invoice.	Blanket POs for goods and/or services
Would you please go over the steps for capital equipment orders?		Please search the Learning Exchange for WDPL-201. This course contains a flowchart and Quick Guides on all 12 steps of the capital planning and purchase process. We also plan to include this topic in a future town hall.	Capital Equipment Requests
I need to purchase a Dell Computer which is ~\$7500, so capital purchase. It is being purchased with Endowed Chair money for research. I cannot submit without a "Project", apparently a high-level approval needed. Is this required? If so, who should we contact about what constitutes a Project? No clue how to go about this. Thanks Greg		this is done through the capital planning module of Workday. If you type in "capital planning" in the workday search, it will populate if you have access. (you may need access). We have a number of Quick Guides on the process in the Learning Exchange if you search "WDPL-201" If your department chief business officer cannot assist you with the capital planning request, reach out to Susan Meyn in the Office of Research at s.meyn@vumc.org	Capital Equipment Requests
We've seen a package come from central receiving with a "Do not use" sticker on the box but no explanation. I think it was because of damage to the box. What should we do in this case?		The "Do Not Use" stickers were applied by FedEx when several packages were delivered to central receiving. In most instances, it appeared to be related to "Do Not Use" the delivery address that was noted on the package and use the central receiving address.	Central Receiving and Workday Receipts
From Survey: "1. We've seen a package come from central receiving with a ""Do not use"" sticker on the box but no explanation. I think it was because of damage to the box. What should we do in this case?"		The "Do Not Use" stickers were applied by FedEx when several packages were delivered to central receiving. In most instances, it appeared to be related to "Do Not Use" the delivery address that was noted on the package and use the central receiving address.	Central Receiving and Workday Receipts
Sometimes, when we get a package delivered, the delivery person from central receiving will tell us that they are too busy and could not bring all of our packages up to our lab and that if we want them, we should go pick them up. Are there any plans to hire more employees to deliver these packages?		Answer Pending	Central Receiving and Workday Receipts

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<p>There was a mention that in workday, receipts should only be created when items have been physically received at the correct location. As we occasionally have items end up central receiving, I am often notified of these "mis-deliveries" through a workday receipt. Is there a plan to change how we are notified about those packages so that we can then generate those electronic WD receipts when we physically have received the packages?</p>		<p>Packages received in central receiving are received into Workday by the receiving staff. When these items are received, a notification is sent to the requestor. We will be updating the message on the notification to state if temp controlled, the package will be delivered. If the package is not temp controlled, individuals should come to central receiving to pick up the packages.</p>	<p>Central Receiving and Workday Receipts</p>
<p>What happens when our receiving department accepts a shipment fully but does not upload the invoice and they create a receipt but it isn't accurate and the shipment is not completely received (missing supplies in shipment for example). they also don't provide the invoice provided to them.</p>		<p>The packing slip that accompanies the shipped package, should remain with the delivered package. This packing slip can then be uploaded/attached to the receipt that was created. If all of the items are not in the package, a receipt adjustment can be completed to update what was received.</p>	<p>Central Receiving and Workday Receipts</p>
<p>What if central receiving loses a package, is "create receipt adjustment" the way to go to null the items that are marked as received?</p>		<p>If a package was received by VUMC (i.e. central receiving), but was not subsequently delivered to the department, a note should be added to the receipt in Workday that the items were not ultimately delivered. Those items should then be placed on the red cap report for review and determination of removing the cost from the cost center. Removing/cancelling the receipt in Workday will prevent the supplier from receiving payment.</p>	<p>Central Receiving and Workday Receipts</p>
<p>We have had packages sit up to 6 days in Central Receiving before being checked in, after which time the items were no longer viable. How does Central Receiving ensure items will be checked in on the day of arrival?</p>		<p><i>Answer Pending</i></p>	<p>Central Receiving and Workday Receipts</p>
<p>How does central receiving notify us that they have received packages? I have thus far, never received a within WD notice about a package being received in central receiving.</p>		<p>When a package is received by Central Receiving, a notification is sent to the requester of the purchase order.</p>	<p>Central Receiving and Workday Receipts</p>
<p>From Survey: I still have concerns about timely checking in/notification/delivery of packages from Central Receiving. We've had temperature-sensitive items sit in Central Receiving for up to six days before being checked in, after which time the items were unusable. How can we be certain Central Receiving is handling packages the day of delivery? What recourse do we have if items sat too long and are unusable? We've also encountered several packages that were mislabeled with the incorrect room/contact name so were unable to locate our boxes.</p>		<p><i>Answer Pending</i></p>	<p>Central Receiving and Workday Receipts</p>
<p>From Survey: Hi, I understand if Central Receiving creates a receipt we don't need to do that, but we should fill out a Capture Goods Delivery to confirm our lab received it. However, I am not sure what information to input.</p>		<p>Yes, correct. In addition, the training documents are in the process of update to give guidance on Goods delivery.</p>	<p>Central Receiving and Workday Receipts</p>
<p>From Survey: "I hope I didn't miss this if it was addressed, I've had to step away a few times: Is it really appropriate for central receiving to be marking POs as fully received when the boxes are left with them? They are not opening the boxes to check contents (nor should they). This is especially a problem for POs that contain multiple items. They can easily mark items received that were indeed not received. Also, I have had someone accidentally create a receipt for my PO because they mistyped their PO. How can a receipt be retracted? Seems to me that this ability for ANYONE to be able to receive ANY PO, even if they have no association with the lab that placed the order is creating more problems than help. How can items be received if I (the person who placed the order) didn't receive them?"</p>		<p><i>Answer Pending</i></p>	<p>Central Receiving and Workday Receipts</p>

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When we upload a packing slip as an attachment under receipts, are we expected to upload the same packing slip under each line number? Or is there a way to upload the packing slips so that it applies to all line items within a requisition?		Within one receipt you can add multiple line items and attach a receipt(s) with any packing slips that were included in that shipment for the items that have been delivered. After adding the quantities of each item, you can scroll down to the Attachment section at the bottom of the page. You will only need to add receipts for items that have been delivered as they come in.	Central Receiving and Workday Receipts
From Survey: 9. Sometimes when creating a receipt, we then get a message in the inbox asking if it was delivered or if delivery was attempted. What do we do in this situation?		Please complete the Goods Delivery document. Additional training will be coming to further explain the process.	Central Receiving and Workday Receipts
From Survey: 10. We have POs that say "successfully completed" and "fully invoiced" but then the admin comes back and says they haven't been paid because we didn't finish the receipt. There are flags on the admin side but not on our side in workday. How can we know what to do if we don't see the flags? "		A receipt must be in approved status for it to be used in the match process. Receipts in "draft", "in process", "adjustment pending" will prevent an invoice from properly matching. Please ensure your receipts have a status of "approved" when completed.	Central Receiving and Workday Receipts
How can we receive a package when the purchase order was received by Central Supply and closed out?		The buyer can be contacted to open a closed purchase order. A purchase order can be reopened, if in the same fiscal year as closure. In addition, receipts and invoices will need to be considered as well.	Central Receiving and Workday Receipts
How can we make sure a credit was applied to a purchase order that was received and closed out?	We are currently having to place a new purchase order and reference the old purchase order that should have a credit against it. I have two concerns regarding this process. • There is a credit on VUMC account, and it could be applied to any PO within VUMC and not the correct center number. • The other concern is the credit is not being applied to the correct purchase order that the item was ordered on/returned on. This is not showing the true transactions and cost of this order	The credit should be applied to the applicable purchase order. The supplier should ensure this information is included on the credit memo	Central Receiving and Workday Receipts
We have an ongoing problem with our very expensive, very temperature sensitive packages being directed to central receiving, where they may or may not be delivered the same day. Is there a way to ensure that our packages get delivered directly to us? If central receiving cannot be bypassed, is there a way to add more people to these notifications?	There is no way of telling whether it will be delivered or not. For example, today I got a notification that PO 94975 had been received. So around 4:00pm I decided to go check. It had been left out at room temperature. The dry ice was very low and certainly would not have lasted until tomorrow. I do not always have time to work a 30 minute round trip walk to central receiving into my day. Is there a way to ensure that our packages get delivered directly to us? In addition, I am afraid that if I had been sick or left early for any reason, no one in my lab would have even known to be looking for a package. If central receiving cannot be bypassed, is there a way to add more people to these notifications?	Answer Pending	Central Receiving and Workday Receipts
What if anything do I need to do in Workday for a requisition where the item was lost on delivery and never received?	It does not seem appropriate for me to follow the normal path of completing a receipt and a Goods Delivery Ticket for an item that was not received. This requisition (REQ1033272/ REQ1033272) is nearly 3 months old, is unpaid and instead is stuck in limbo.	We can request a POD (proof of delivery) from the supplier. If the item was delivered to VUMC, we will need to acknowledge the receipt in Workday so the supplier can be paid. However, we need to capture this lost item on the Red Cap Survey link so that we can identify these expenses for further dispensation.	Central Receiving and Workday Receipts
Why don't receipts for goods received by Central Receiving indicate whether the items will be delivered, contrary to messages we receive such as the following?	"The requisition you had created REQ1074750 has been received in receiving by Bryon Randolph. Please contact receiving department to coordinate delivery/pick up of your package. If the receipt is marked for delivery, the receiving department will make the delivery based on team availability. If the receipt is marked for pick up, the item will be available for you to pick up at receiving department."	Answer Pending	Central Receiving and Workday Receipts
When attempting to receive items and creating a receipt, most are "no matches found" for the PO# entered. A few are; however, most are not.		Please ensure you are on the VPN when receiving in Workday.	Central Receiving and Workday Receipts

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Can you please assist with getting the receivers access to the itemized "Supplier Invoice Document" in the Workday system so they are able to create appropriate receipts?	The staff receivers in the lab do not have access to the "Supplier Invoice Document" in the Workday system to correlate what was received with dollar amounts and create receipts even though the invoices are in the Workday system [e.g. SI-000061230 is attached in the Workday system because it is available (link colored blue below) for another employee but the link colored blue is not available for our receivers for the same invoice (shown below)]. Without being able to access the itemized "Supplier Invoice Document" in the Workday system, the receivers can't see what is included on the invoices so it is unclear what the invoices correspond to, determine if the charges are appropriate, and accurately create receipts.	The users can request the VUMC Requester role to allow them to see the invoice (blue link).	Central Receiving and Workday Receipts
From Survey: Processes around mis-deliveries. As they show up in central receiving, and are electronically received by central processing, how/when should we mark them electronically as actually getting to the correct location?		Answer Pending	Central Receiving and Workday Receipts
From Survey: Is the goal going forward to have central receiving receive and deliver or items delivered to the lab by the carriers? We have a mixture of both now and it is unclear which is correct and which is wrong. Either way, there are issues with both (central receiving delivers to random locations that are sometimes hard to find and the carriers deliver with no names on the packages), but we are not sure which side to pursue remedies for.		Answer Pending	Central Receiving and Workday Receipts
where can I find the information to search in the capture goods delivery?		Answer Pending	Central Receiving and Workday Receipts
Why are packages being sent to Central Receiving when the delivery address on the PO lists the lab room number?	e.g. REQ1090529/PO10000096707	At this time, the expectation is that packages will be delivered to the requisition delivery location. However, we are aware that FEDEX is still overwriting the PO delivery location. We are working to resolve this, as well as other more isolated issues related to misdeliveries	Central Receiving and Workday Receipts; also Workday deliver-to location preferences
What happens when a package was delivered to central receiving, but the lab never received the shipment? If the lab is charged or the item was compromised by central receiving, is there a way VUMC will reimburse the lab?		While we cannot commit to reimbursements at this time, the Office of Research is collecting information regarding lost or damaged items related to Workday issues. You can provide details via this redcap form: https://redcap.link/ReportLostItems	Central Receiving and Workday Receipts: Missing Shipments
Are there people in central receiving marking POs as received? I have many POs which I try to create a receipt for but when I search the document, there is already a receipt which I did not create myself. I know from experience that they are creating receipts. Early on in the process, they would mark entire POs as received (regardless of items received) but I think now they try to only mark the individual items received. Same problem here. When I am receiving those packages, they are unopened. How can they be marking items received if they have not even opened the boxes? This is especially a problem if the PO contains multiple items that were shipped separately.		Answer Pending	Central Receiving and Workday Receipts
We still have not received a \$3,600 Fisher order on a federal grant but the vendor states that it was received. We have been to all loading docks and are unable to find the order. The person who signed did not provide a last name so it is impossible for us to find our package. How will the institution manage these charges and how can we make sure our grant is not charged? The hotline was contacted and the investigator was told that they are not managing orders beyond a certain date.		While we cannot commit to reimbursements at this time, the Office of Research is collecting information regarding lost or damaged items related to Workday issues. You can provide details via this redcap form: https://redcap.link/ReportLostItems	Central Receiving and Workday Receipts: Missing Shipments
If a package was received and signed for at VUMC receiving dock, but never was delivered or found/located, what should we do? It was expensive order \$3,500 cost. Thank you!		While we cannot commit to reimbursements at this time, the Office of Research is collecting information regarding lost or damaged items related to Workday issues. You can provide details via this redcap form: https://redcap.link/ReportLostItems	Central Receiving and Workday Receipts: Missing Shipments

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From Survey: i have ordered stuff an never received		While we cannot commit to reimbursements at this time, the Office of Research is collecting information regarding lost or damaged items related to Workday issues. You can provide details via this redcap form: https://redcap.link/ReportLostItems	Central Receiving and Workday Receipts: Missing Shipments
From Survey: 4. The prices on the supplier websites seem to not always reflect a discount since the transition. Speaking about Fisher in particular, the products are often displaying full price when they should have a discount.		When setting up all the new locations, Fisher did not load all the new accounts under our master pricing. This issue was identified and Fisher has been issuing credits for instances where our contracted price was not given.	Contract Pricing
Why are employee ID numbers being transmitted to vendors?		The employee ID is used to identify unique users in Workday. It does not contain any additional privileged employee information. This number being part of the purchase information is how Workday has been designed.	Employee ID
1. My employee ID is being placed on package delivery labels. Can this be removed asap?		The employee ID is used to identify unique users in Workday. It does not contain any additional privileged employee information. This number being part of the purchase information is how Workday has been designed.	Employee ID
Why are employee ID numbers being transmitted to vendors? Is there a plan to resolve this?	This is a question that was also asked in the 7/20 Research Procurement Town Hall Q&A but there is not a response.	The employee ID is used to identify unique users in Workday. It does not contain any additional privileged employee information. This number being part of the purchase information is how Workday has been designed.	Employee ID
I am receiving a lot of e-mails from vendors where the invoices are not being paid. I have forwarded the invoices to VUMC invoices but still continue to receive the emails. What do I need to do to get the invoices paid?		Forward supplier invoice emails to vumc_electronic_invoices@vumc.org with the invoice details.	Payments
I have noticed that we are missing invoices from some vendors for orders that were placed and fully received months ago. Who is responsible for finding these and following up with the vendors? Is there an automated process or prompting within WD?		Please email vumcdisbursements@vumc.org with the invoice details.	Payments
How do we delete an old supplier invoice request? It could not be approved initially because of missing approvals within our center (now resolved), and a new one was created and the invoice paid a couple months ago.		If an approver selects Deny on the approval notification, it will permanently delete that Supplier Invoice Request.	Payments
Since Disbursements is now creating the supplier invoices after the PO is generated, how do we ensure that the pay date is 45 days from date of invoice, and not up to 2-3 weeks later because of delays in getting all the approvals and the PO generated?		Supplier invoices have always been entered after the purchase order was generated. Our legacy system required a purchase order for invoice entry unless it was a Check Request. As a reminder, per policy, we are not receive goods and/or services without a properly executed purchase order in place.	Payments
Is there written documentation to distinguish when disbursements will pay a PO and when an item must be submitted to the vumc_electronic_invoice@vumc.org email address?		If the invoice is received by disbursements, they will enter the invoice and it will await the receiving process to be paid. If you receive the invoice in the department, then it should be sent to the email address.	Payments
Why are there requisitions/POs for which the items have been received and receipts have been uploaded to Workday and that are more than 2 or 3 months old that have not yet been invoiced and paid?	e.g., REQ1000054/ PO100000000470 and REQ1020425/PO100000021487	If the supplier does not reference the purchase order on the invoice when submitted for processing, the invoice is placed in draft until a member of the VUMC Disbursements team can locate the rightful owner and/or purchase order to assign the invoice.	Payments

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Why am I receiving emails from vendors asking for their invoices older than 90 days to be paid?		We have a back log of invoices that are still being received from many of suppliers that reference the legacy purchase order. However, the purchase order does not exist in Workday. It takes additional time to research and process. During the transition, we received a significant number of invoices that fell into this category. With additional time it takes to process invoices and this large back log, the team is behind on getting invoices paid. We are aggressively trying to work down that back log. We initially started working the back log based on the higher dollars. Please send an email to Yolanda Redmond letting her know which vendors are reaching out so that we can review.	Payments
how do I cancel a PO I no longer want? I have contacted the vendor and they know to cancel the order but it is still open in the system.		You can email vumcprocurement@vumc.org with your PO information to get that PO cancelled.	Purchase Orders: Cancellations
how do you cancel a portion of the PO on a requisition if you received a portion but the remaining order is no longer needed- how do you cancel the remaining accrual.		You can email vumcprocurement@vumc.org with your PO information to get that PO cancelled.	Purchase Orders: Cancellations
If a vendor cancelled items from an order, and the remaining items have been fully received and fully paid, what is the process for removing those cancelled items from the PO/system and clearing the obligation?		You can email vumcprocurement@vumc.org with your PO information to get that PO cancelled.	Purchase Orders: Cancellations
How do we track a credit that has been applied to the correct PO when a new order is placed, and the credit is applied to the new purchase order?	Should we not confirm the 2nd/final receipt of this purchase order so a credit can be applied if needed?.	You can email vumcprocurement@vumc.org with your PO information, or work directly with your Buyer to resolve this.	Purchase Orders: Cancellations
Currently, some orders are not being sent to companies through email or fax. I am having to follow up on orders and sometimes send POs over myself days later. What is being done to correct this?		You can email vumcprocurement@vumc.org with your PO information, or work directly with your Buyer to resolve this.	Purchase Orders: Communication to Suppliers
Some order requests are showing PO approved, but the vendor did not receive the PO. How can we avoid that or solve that problem?		You can email vumcprocurement@vumc.org with your PO information, or work directly with your Buyer to resolve this.	Purchase Orders: Communication to Suppliers
often my purchase has been approve and PO generated but the vendor will not have received the order. I usually have to send the vendor a copy of the PO directly.		You can email vumcprocurement@vumc.org with your PO information, or work directly with your Buyer to resolve this.	Purchase Orders: Communication to Users
What are the GTX open goods notices that I am constantly getting and being told to acknowledge? I dont know what they are so im not approving anything.		The goods delivery documents are part of the confirmation steps to be taken when receiving an item in Workday. Additional training for these goods delivery will be rolled out to our users.	Purchase Orders: Communication to Users
Workday does not have all the order confirmation (e.g. expected delivery date, vendor order number, etc) and shipping information (e.g. tracking number, ship date, etc.) that in the past end users received directly from the vendors (e.g. Fisher) and in some cases the information in workday is inaccurate (e.g. workday indicates backorder but the vendor and FedEx indicate the item was delivered). Can a way for end users to directly receive order confirmation and shipping notifications from vendors be implemented as in the past?		The purchase order acknowledgements (POA) in Workday are the initial confirmations that we receive from the supplier. We currently do not receive on going notices of order status from the vendor. We are looking for future enhancements to provide this information.	Purchase Orders: order tracking and shipping.
From Survey: Order tracking, it would be great to be able to go to the vendor websites without starting a new requisition. For example, my current workflow includes checking backorder status from Fisher, however, I can only get to punch out if I have a correctly formatted requisition header entered. This is a bit of an issue because there is not just one fund/program that I order on and so then I have to go back and edit that header. It would be nice to be able to get to punch out without that.		Thank you for this recommendation. We will add it to our list of enhancements under review.	Purchase Orders: order tracking and shipping.

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When is it anticipated to be resolved so that end users directly receive order confirmation and shipping notifications from vendors?	This is a question that was also asked in the 7/20 Research Procurement Town Hall Q&A but there is not a response. Workday does not have all the order confirmation (e.g. expected delivery date, vendor order number, etc) and shipping information (e.g. tracking number, ship date, etc.) that in the past end users received directly from the vendors (e.g. Fisher) and in some cases the information in workday is inaccurate (e.g. PO10000005903 - workday indicates backorder but the vendor and FedEx indicate the item was delivered to central receiving; the order was never received by the lab after multiple attempts to locate it). Fisher indicated that VUMC is aware of the issue with GHX.	The purchase order acknowledgements (POA) in Workday are the initial confirmations that we receive from the supplier. We currently do not receive on going notices of order status from the vendor. We are looking for future enhancements to provide this information.	Purchase Orders: order tracking and shipping. This would be an enhancement to Workday, and is not currently possible.
Where does the requisition submitter (me) get confirmation that the order was confirmed? And then receive the date of arrival?		You can find the status of the requisition in the Requisition application homepage. Once this req has become a PO, you will then also be able to see the PO's status in it's page in Workday.	Purchase Orders: order tracking and shipping.
How does the requisition submitter (me) find out when the order has been submitted and confirmed that it is coming? I'd love to know if we could also get an estimated arrival date. How can I find this after submitting into workday?		You can find the status of the requisition in the Requisition application homepage. Once this req has become a PO, you will then also be able to see the PO's status in it's page in Workday.	Purchase Orders: order tracking and shipping. You can find the status of the requisition in the Requisition application homepage. Once this req has become a PO, you will then also be able to see the PO's status in it's page in Workday.
I appreciate everyone's time in this townhall. However, I think its important to recognize and (perhaps balance out some of the positivity) with some negativity. I think there needs to be a fundamental recognition from leadership that this was NOT a successful roll out. This really affected our ability to function and reflected a poor understanding of the research enterprise. My administrators are still having trouble telling me how much money we have remaining on grants. Perhaps sometime in the future this will be working smoothly, but it is NOT working smoothly now, and I dont feel like that was adequately voiced. I do however thank everyone for trying to get things back on track.		Thank you - Reporting is something that is still in development. The Training team is working with both Finance and the Research workstreams to continue to develop the training needed around reporting. In addition, Finance senior leaders are working on addressing urgent need for closeout reporting; and longer term, working with department administrators to map out improvements in system and SOP for generating timely and accurate grant reports. A Research Town Hall on this subject is scheduled for August 10 at 10am.	Reporting
Is there a new version of an encumbrance report and what roles have access?		This report is sent to the Cost Center Manager security role. You may want to connect with your department administration to assess your current security access and available options.	Reporting
Is the match exception report only available to "Cost Center Managers?" Is it available to any other roles, such as Cost Center Financial analyst? It would be helpful to have other security roles able to see this report or if we could delegate the follow up on Match Exceptions in our inboxes in MWD.		This report is sent to the Cost Center Manager security role. You may want to connect with your department administration to assess your current security access and available options.	Reporting
From Survey: "Thank you for your help with these items: 1. Our admin team is still not able to pull budget status reporting on our grants as of 7/20/23. Meaning, since Workday implement and now at the end of the fiscal year we as a lab don't know how much money we've spent and how much is left on our grants. This is a major issue and needs a town hall meeting as well and specific training materials distributed.		Finance senior leaders are working on addressing urgent need for closeout reporting; and longer term, working with department administrators to map out improvements in system and SOP for generating timely and accurate grant reports. A Research Town Hall on this subject is scheduled for August 10 at 10am.	Reporting
Do we ever need to add freight or shipping fees as a separate line item on a non-catalog item PO, when the charge is listed in the quote.		The freight charges should be added to the Requisition Information section during checkout.	Requisitions
What steps need to be performed and who needs to be contacted when a staff member is close to leaving Vanderbilt and is the sole ordering entity?		We recommend you work with your department administration to make sure a member of your lab has the Requestor role in Workday	Requisitions - REQUESTOR role

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From Survey: VU graduate students and workday privileges. Has there been an established decision about whether graduate students (and possibly undergrads) are allowed to have WD privileges for requisitions and receiving? Our lab's workflow has always had the ability/task for receiving to be done by trainees who are physically in the lab and needing the items, but I've been having trouble figuring out how to get that to happen in WorkDay.		Please work with your department administration to 1) initiate the a dual ID request process for the graduate student, and once that is provisioned, 2) to give the grad student the Requestor role in Workday	Requisitions - REQUESTOR role
Who do we contact to have a new staff member access to ordering/procurement?		We recommend you work with your department administration to make sure a member of your lab has the Requestor role in Workday	Requisitions - REQUESTOR role
Can graduate students participate in the ordering/procurement process?		Please work with your department administration to 1) initiate the a dual ID request process for the graduate student, and once that is provisioned, 2) to give the grad student the Requestor role in Workday	Requisitions - REQUESTOR role
The process for updating worktags on purchase orders not yet received? Previously contacted Tamena and Alexis, but perhaps different now?		We recommend that you work with department administration and your Buyer to make these updates.	Requisitions: cost distribution
From Survey: I would like there to be a way to edit all items in a requisition. For instance, sometimes I need to split costs on different grants on multiple line items. Right now I need to do this to each individual line item which takes a lot of time.		You can you can apply a split to all lines on a requisition. There are 3 dots when you hover to the right of "submit" on a requisition. This allows you to edit the defaults for all lines. Thank you to Amber Bradley in the Diabetes Center for sharing this tip!	Requisitions: cost distribution
Are you working on a way to have the option of a default distribution apply to every line item on a requisition instead of having to enter the same distribution for each line item?		You can you can apply a split to all lines on a requisition. There are 3 dots when you hover to the right of "submit" on a requisition. This allows you to edit the defaults for all lines. Thank you to Amber Bradley in the Diabetes Center for sharing this tip!	Requisitions: cost distribution
Why does the "Save" button within "Requisition Details" (used to edit requesting for, ship-to address, worktags, and more) not save anything?		<i>Answer Pending</i>	Requisitions: cost distribution
2. I would like us to have a more ambitious goal than 2 business days for order approval.		Thank you for this recommendation. We are working toward this goal and appreciate your help in identifying process improvements for research department use of Workday	Requisitions: order approval process
Is there a process to "refresh" a requisition in the queue if it has not been purchased within 2 days of manager approval?		You can see the remaining approvers for a requisition in the Process tab within the requisition and can reach out to them directly via email as a reminder that the requisition still needs to be approved.	Requisitions: order approval process
why are some orders still on the "open" list? How do we move them to closed?		Requisitions move to "closed" status once they are approved and the order is placed by procurement. You can reach out to the procurement team with your specific requisition question at vumcprocurement@vumc.org	Requisitions: order approval process
From Survey: "Thank you for your help with these items: 2. There is significant delay in purchasing on requisitions that are sent back for worktag corrections by my approvers. (The process has been slow to generate new worktags for grants that would typically need a new center number every year, which is causing the back and forth.) Once approved by my manager, the requisitions are sitting for over a week and not being ordered/ POs generated within 2 days of the approval. Is there a way in the system to flag requisitions by approval date for the purchasers as opposed to generated date? I understand from feedback from the purchasers that the requisitions are getting lost. It's unclear who to contact in these cases, but I usually contact Tamena Jenkins. Is there a more general email address I could use in case Tamena is out of office?		Yes, for the buyers that handle purchase services, you can use workdaypurchaseservices@vumc.org to contact Tamena or anyone on that team. If the question is for medical supplies, the team email address is workdaymedicalgroup@vumc.org .	Requisitions: order approval process

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From Survey: Often my items will stop at a buyer and get stuck there, well beyond the 48 hour minimum. This was nearly devastating for my lab. How can I make sure my requisition goes to the correct buyer, or that the correct buyer sees it?		During the first couple of months with the go live, the purchasing team did get behind in processing requisitions. This continued to grow once the team was removed from their blackout PTO time in late May early June. The team has now caught up on the back log. The average processing time is 2 business days.	Requisitions: order approval process
What are the steps for an order request to be approved?	Sometimes we notice an order has been waiting for approval for a long time. It seems that orders get lost somewhere. How to avoid that?	This presentation September 27, 2022 - Org Structures & Purchasing https://www.vumc.org/myworkday/sites/default/files/public_files/Change%20Network%20Department%20Presentation%209.27.22.pdf has a good overview of the order approval process.	Requisitions: order approval process
From Survey: Bulk-edit for manual entry, special order. I would really appreciate a way to upload a CSV or other formatted file with special orders. I totally understand that there is some data sanitization and/or error handling that would be necessary between data upload and it showing up in workday cart before checkout. However, the ""long"" delay (at least 300 ms of latency) to ensure that certain fields are only populated by valid data (for example, 'each' is an acceptable unit) means that manually entering these purchases takes an incredible amount of time. "		Thank you for the recommendation. It will be added to the list of enhancements for review.	Requisitions: special orders
From Survey: Bulk-edit for spend category. Even for items that come from punch out catalogs, I still have to manually enter the spend code for each individual line. It would be great if this could either happen with a default, or a bulk change option, or something to speed along the process.		Thank you for the recommendation. It will be added to the list of enhancements for review.	Requisitions: spend categories
From Survey: "Thank you for your help with these items: n I use the punchout catalog, Workday is populating an incorrect account code, sc145 instead of sc195. I manually populate this code for non-catalog items and am manually checking and changing it now. "		Can you let us know what item you are referencing	Requisitions: spend categories
For ordering method 'Request Non-Catalog Items', if we have more items from the same vendor, can we save the vendor's information?	Right now, after each item is entered, we need to repeatedly enter the vendor information, chose spend category etc. Will we be able to use the same strategy as we have used in the past with eProcurement? We need an efficient way to order. The current Workday process makes us to do a lot of extra, unnecessary, repetitive work.	Answer Pending	Requisitions: Supplier information
3. Does the "High priority box" get a PO issued more quickly? If I need a PO same-day, should I contact the buyer rather than use the High Priority box.		The high priority box is just for expedited shipping. If a PO needs to be created same day, you should reach out to your approvers and buyer to expedite the process. You can see a list of necessary approvers in the Process tab after completing a requisition.	Requisitions: urgent orders
Is there a contact person to help with create receipt issues and/or disbursements inquiries?		there are several group inboxes that you can utilize depending on where it is in the process: vumcdisbursements@vumc.org vumcapexceptions@vumc.org vumcprocurement@vumc.org	Resources

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Can I get a list of these workday email address that can be used for various functions/questions/or issues		Invoices and payments: email vumcdisbursements@vumc.org with the invoice details Match exceptions: email details to vumcapexceptions@vumc.org Requisitions and suppliers: email details to vumcprocurement@vumc.org Forward invoice emails from suppliers: vumc_electronic_invoices@vumc.org Add or correct a delivery address: submit a Pegasus Workday Support Issue ticket. In the "What area are you having a problem with?" field, select SCM Procurement from the dropdown menu. Supply Chain hotline: Contact Elise Jackson with other concerns or issues related to Supply Chain: email elise.jackson@vumc.org or phone 615-343-5453. Damaged or lost shipments: the Office of Research is collecting	Resources
1. What if our supplier has been approved, but we cannot find them in workday?		Here is the link to the approved supplier list: https://www.vumc.org/finance/supplier-lists . There are several approvals and there may also be information the SCM team needs from the supplier before they are activated. you can reach out to vumcprocurement@vumc.org with a specific supplier question	Setting up new Suppliers
I apologize if I missed this - I have been kicked off twice due to storm-related power outages. For new vendors, what are the steps, please? I have submitted one and it was approved, but we have been trying to get this ordered for two months now (because I wasn't apparently following the right process, not all on Workday!) - but once it is approved, what happens next? How can I help move it along?		Here is the link to the approved supplier list: https://www.vumc.org/finance/supplier-lists . There are several approvals and there may also be information the SCM team needs from the supplier before they are activated. you can reach out to vumcprocurement@vumc.org with a specific supplier question	Setting up new Suppliers
After a new supplier is added/approved, how to change from "inactive" to active? This happened to me as well - when I reached out I was told that the supplier was inactive because they need to fill out forms on their end. I ended up reaching out to the supplier and they were able to help. Do you know how I can connect the company with the proper resource to fill out? According to a response here, I need to connect the supplier to someone in purchasing to fill out forms? Who or what e-mail/phone number would that be?		Here is the link to the approved supplier list: https://www.vumc.org/finance/supplier-lists . There are several approvals and there may also be information the SCM team needs from the supplier before they are activated. you can reach out to vumcprocurement@vumc.org with a specific supplier question	Setting up new Suppliers
From Survey: 2. How do we budget for the loss of time due to new workday requirements? My lab now spends about 10% effort on workday related purchasing, where it used to be 1-2%, resulting in either reduced research output or people working longer hours. Even if workday works smoother, it will never be as efficient as before, since now each individual lab does work that used to be centralized. This is not in the job discretion for my employees. Is this even a factor we can budget for in NIH grants? What do we do about the loss of research time and resources due to the workday transition?		We recommend that you work with your department grant administrator and the Office of Sponsored Programs to determine the best approach to budgeting and allocating effort on your grants.	Unique
2. I was asked about a contract for consulting services, but the provider I am assiting has never had a contract.		Answer Pending	Unique
How are we doing ethanol purchases for research labs? Previous method we used was 1180 taken to central receiving.		Answer Pending	Unique
who do we reach out to for help in creating a template for Medline supplies as a research purchaser?		Answer Pending	Unique

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I have multiple POs from different suppliers which do not show up when I search the document to create the receipt (18 POs so far). Is this a known issue/what is being done to resolve this? Is there another way to mark the items as received?		When searching, you may need to click "more" to see more results. In addition, you can change your search preferences to ensure you capture more possible results of a given search. Use this step by step guide to make changes https://mcusercontent.com/033211589320d11b91c946dce/files/9f0a1a41-5389-e618-0124-ac73e99e2ec0/Changing_Search_Preferences_updated.pdf	Unique
From Survey: I would like to know if there are tools within Workday to manage research laboratory inventory. It appears this is possible for clinical areas, but unclear if applicable to basic science labs.		Answer Pending	unique
We need a way to check on subject participation payments.	We have family members that are calling us/IRB etc. wanting to know where their check is and when are they going to receive it. How can we get the following information? <ul style="list-style-type: none"> Name on check Address on check Date check was mailed. Check number. Was check cashed? Date check was cashed. In the past I was able to run a report in BI with all this information so I could pass it along to the patient. I am not able to run a report with this information in Workday. Please advise how we can get a report with this information in Workday. 	Answer Pending	Unique
From Survey: 6. Has anyone talked to the VU side about their missing packages? They had a lot of missing packages that ended up in VUMC central receiving because the carriers did not realize they were a different entity.		We have not received any notification from VU users or leaders regarding lost packages. If you have specific examples of this, please send them to S.Mevn@vumc.org .	VU impact
What do messages like "PO10000094047 for your REQ1087639 has been Pending Issue" mean?		Answer Pending	we need more information to understand this issue - may be unique to user
Why do I receive messages like "PO10000085966 for your REQ1078394 has been Pending Issue" for POs that are entirely unrelated to requisitions I have submitted?		Answer Pending	we need more information to understand this issue - may be unique to user
I can make the Deliver-To location change (e.g. LOC91273) using the gear/pinwheel, but when I create a requisition under shortcuts, the location (e.g. LOC91273) does not stay, it is not there, and it reverts to a different location (e.g. LOC91271), so it needs to be changed every time. Is there a way the location (e.g. LOC91273) can be the default when creating a requisition under shortcuts? I am told LOC91273 was built as a work-site address. Apparently, LOC91271 was used because it is the superior location of LOC91273, and LOC91271 is a business-site location. LOC91273 cannot be used for an employee location because it is not a 'business site' location. Can LOC91273 be a business-site location?		The Workday upgrade in September should make it possible to save deliver to information.	Workday deliver-to location preferences
Can we create a personalized profile of deliver to address/location so that we do not have to change to address each time we make a new requisition?		The Workday upgrade in September should make it possible to save deliver to information.	Workday deliver-to location preferences
I have to still overwrite the address when creating my orders. I've requested address changes and they are changed in my profile in workday but when I go to Purchases it still says my address is my HR offices. Can this be changed so that it defaults to my lab address?		The Workday upgrade in September should make it possible to save deliver to information.	Workday deliver-to location preferences
How do you edit the "Requisition Details" so that the "Location" and "Deliver-to-Location" is your actual work location and not just the building? I have to change it every time.		The Workday upgrade in September should make it possible to save deliver to information.	Workday deliver-to location preferences
So whatever deliver to address I enter, the ship to address will change to the correct building? I work at 3 different locations (buildings) throughout the week each of which we need to have supplies delivered to: 1) VASAP Clinic on West End, 2) MCN and 3) Light Hall.		Answer Pending	Workday deliver-to location preferences
Several of us have deliver to and ship to addresses that are not correct. I've submitted a Pegasus ticket with no response and currently manually change these with EVERY requisition. What is the current guidance to resolve this? One of my deliver to locations mysteriously changed to include "DO NOT USE" in the name Yes the one I used to use also showed "DO NOT USE" recently.		Answer Pending	Workday deliver-to location preferences

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Our deliver-to address had been fixed (we thought) but just yesterday, a delivery was made to Central Receiving. PO printing run read correct address, but packaging had buyer's name (Tamena Jenkins). Not sure if that was vendor specific, FedEx specific, or related to cost center used to order.		At this time, the expectation is that packages will be delivered to the requisition delivery location. However, we are aware that FEDEX is still overwriting the PO delivery location. We are working to resolve this, as well as other more isolated issues related to misdeliveries	Workday deliver-to location preferences
We are still having trouble with the POs being entered on the vendor side without room numbers, because their systems are only pulling the "ship-to information from the POs. So our packages are still going to central receiving due to lack of room number. Many times they don't even make it there and just get returned to sender. Dell and CDW are my common vendors Have to submit POs myself to them in order to have the correct address. Suites get left off Abcam only adds info from the "Ship-to" box to the shipping label		At this time, the expectation is that packages will be delivered to the requisition delivery location. However, we are aware that FEDEX is still overwriting the PO delivery location. We are working to resolve this, as well as other more isolated issues related to misdeliveries	Workday deliver-to location preferences
From Survey: 5. Some suppliers, such as cellsignaling, seem to have adapted their system to reflect the POs that were sent out in May, with the incorrect addresses. Now that the addresses are fixed, they are not being entered correctly. What do we do in this case?		At this time, the expectation is that packages will be delivered to the requisition delivery location. However, we are aware that FEDEX is still overwriting the PO delivery location. We are working to resolve this, as well as other more isolated issues related to misdeliveries	Workday deliver-to location preferences
From Survey: 7. Why do we have to enter the same shipping address and other information into workday every time? It makes no sense for the system to auto populate the wrong address every time we log in.		The Workday upgrade in September should make it possible to save deliver to information.	Workday deliver-to location preferences
Why do some items with a specific location tag (e.g. loc12896) still go to receiving?	Some of our orders are delivered as they should be - though that was not true at the rollout, it improved. But in the past week, we have several deliveries where we get an email from someone in receiving to pick up these orders. This is not sustainable, as many of the items are time and temperature sensitive. I get an email, have to forward it to lab personnel, they have to email the contact and find out where to go ~ Is this something we are working to resolve? I have put in several tickets.	The Workday upgrade in September should make it possible to save deliver to information.	Workday deliver-to location preferences
Can we save the Requisition Details?	Right now, we need to set the Requisition Details every time when we submit an order. It just wastes time to repeat the same process. If we can save the information, we can adjust whatever needs to be adjusted, that will be much better.	Answer Pending	Requisitions
Are there limitations on what can be a "deliver-to" location? How do I change the default "deliver to" location?	This is a question that was also asked in the 7/20 Research Procurement Town Hall Q&A but there is not a response. Changes can be made to Deliver-To location (e.g. LOC91273) using the gear/pinwheel, but when a requisition is created under shortcuts, the location (e.g. LOC91273) does not stay, it is not there, and it reverts to a different location (e.g. LOC91271), so it needs to be changed every time. Is there a way the location (e.g. LOC91273) can be the default when creating a requisition under shortcuts? I am told LOC91273 was built as a work-site address. Apparently, LOC91271 was used because it is the superior location of LOC91273, and LOC91271 is a business-site location. LOC91273 cannot be used for an employee location because it is not a 'business site' location. Can LOC91273 be a business-site location? Janine Gallardo and John Carr have been contacted multiple times about this issue and it remains unresolved.	Answer Pending	Workday deliver-to location preferences
If there are addresses we should not use, will those eventually come out of the system? what about if the street address is still incorrect?		Old or incorrect addresses would eventually be pruned from the system.	Workday deliver-to location preferences.
Why do we need to duplicate effort by creating a receipt AND a goods delivery ticket when items are received?		Answer Pending	Workday process
Why, when there is an "exception" on an invoice waiting for some action on my part am I not informed what I need to do to correct the exception?		Answer Pending	Workday security access
When the Supplier/Vendor is setup, how do we ensure they are setup as a Manufacturer as well in order for me to submit for ITEM numbers for the IDEs		Answer Pending	Setting up new Suppliers

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<p>How may we get reimbursed for lost packages? I spoke with Bryon in Central Receiving, and he and I looked through the packages several times and it was never shipped. I also notified Fisher and they essentially said they were not responsible for lost shipments. We had similar issues that Nichols, Christy mentioned below. Our package cost \$1733. ./</p>		<p>While we cannot commit to reimbursements at this time, the Office of Research is collecting information regarding lost or damaged items related to Workday issues. You can provide details via this redcap form: https://redcap.link/ReportLostItems</p>	
<p>What is the appropriate method to mark a requisition as ASAP to order?</p>		<p>The High Priority check box within a requisition will show that expedited shipping is necessary. Please be sure to notify your approver of this. I would also add that if a requisition needs to be fulfilled ASAP, you may want to reach out to your approvers directly to expedite their approval process. You can see a list of necessary approvers in the Process tab after completing a requisition.</p>	
<p>From Survey: 8. Workday seems to epitomize the 'death by a thousand clicks' scenario where employees get burned out because of all of the mindless, redundant, and downright unnecessary clicking that has to occur on a daily basis. Doing a receipt in workday is a good example. It could be done in 3 clicks, but it takes 10 clicks to get to the correct location to start the process.</p>		<p>Thank you for this recommendation. We are working toward this goal and appreciate your help in identifying process improvements for research department use of Workday.</p>	