

Research Procurement

Town Hall

July 21, 2023

Agenda

- Procurement Processing for Research
- Training Hub Overview
- Q & A

Title: Procurement Processing for Research

How to Purchase

Requisition



Medical and non-medical goods and services can be requisitioned within Workday.

PCard



A purchasing card, or PCard, is used to charge non-travel expenses.

Supplier Invoice Request



Formerly known as a check request, supplier invoice requests are used when a requisition does not have a PO.

Miscellaneous Payment Request

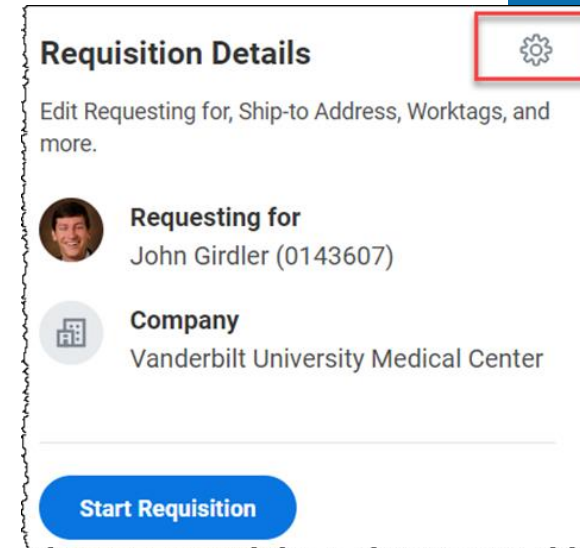


Miscellaneous payments can be requested for honorariums, subject participants, or other one-off payments. These payments will be managed using a separate online form.

DELIVER-TO/SHIP-TO

- **Deliver-To Address (choose first)** – The specific location within a building that an item will be delivered to. This will automatically populate the correct Ship-To Address linked to the Deliver-To Address.
- **Ship-To Address (do not change)** – The building that an item will be shipped to from a vendor. This will automatically populate based on the Deliver-To chosen.

If a **Ship-To Address** is entered first and is the incorrect location to be partnered with the submitted **Deliver-To Address**, the order will not process correctly which will result in *Workday* errors and/or shipping issues.



Requisition Details

Edit Requesting for, Ship-to Address, Worktags, and more.

Requesting for
John Girdler (0143607)

Company
Vanderbilt University Medical Center

[Start Requisition](#)

Change your default Deliver-To using the gear icon before creating a requisition. This will apply the locations you save for new requisitions going forward.

DELIVER-TO/SHIP-TO - UPDATES

- ~400 New deliver-to/ship-to locations were added in May 2023 to facilitate direct delivery to the research areas
 - Confirm available deliver-to/ship-to locations from the SCM Extract Locations Report
 - Ensure the ship to address includes the deliver-to information
 - Request new deliver-to/ship-to's via Pegasus Ticket
- Central Receiving Role
 - Receive packages delivered to central receiving
 - Notify requestors that packages are available for pickup
 - Ensure deliveries are organized for ease of location
- Resolved identified 25 character limit with Fisher that was causing incorrect addresses printed on the labels by Fisher (late June)
- Tracking orders and delivery
- Working with Fedex on this process



Hotline:
Questions
about your
deliveries,
reach out to
Elise Jackson

PURCHASING REMINDERS

Templates for Clinical Areas →

Requisition Templates 1 item	
Select	Name
<input type="checkbox"/>	Weekly Restock

Required Memo field →

Memo

Special printer paper needed to print labels for Supply Chain department.

High Priority check box →

Alert

1. [Page Alert](#)

- High-priority requisitions may incur extra costs for overnight delivering, and please notify the requisition approver

Split Cost option →

Splits

0

Bear Claw Questionnaire →

Inbox

Actions Archive

Viewing: All Sort By: Newest

Requisition: REQ1001006, Requester: Anita Knapp
Amount: \$75,000

Complete Questionnaire

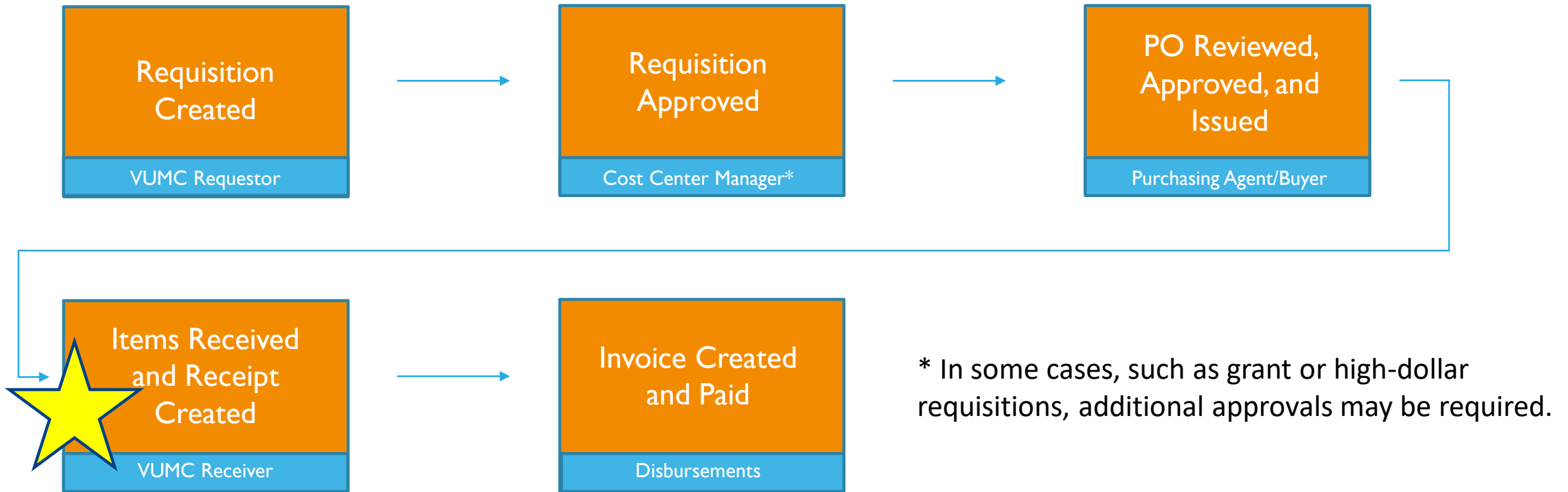
'Federal Procurement Standard Justification' for Requisition:
REQ1001006, Requester: Anita Knapp
Amount: \$75,000.00

Contract Selection →

Supplier Contract

× CON-004280: CE7651AC - VHPC
ConMed Smoke Evacuation

PROCURE TO PAY WORKFLOW



* In some cases, such as grant or high-dollar requisitions, additional approvals may be required.

MATCH EXCEPTIONS

- For questions or assistance, please reach out to vumcapexceptions@vumc.org

PARTIAL RECEIPTS

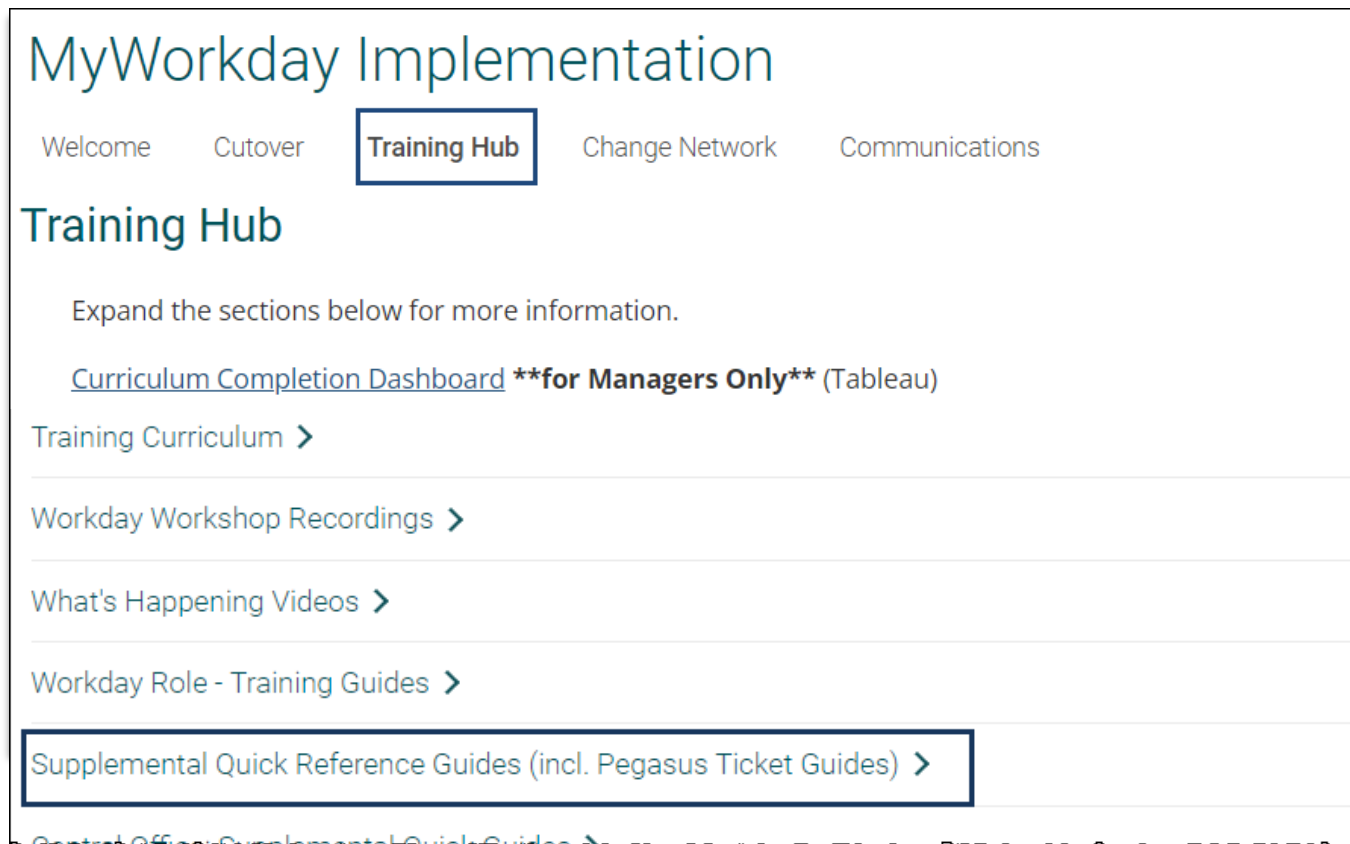
Only goods/services that have been delivered to the appropriate location should be received in Workday.

- If a blanket PO is created, the entire PO should not be received (unless it has been fully delivered)
- Each time goods/services are delivered to the appropriate location they need to be received at the individual line item level within the PO.
- Goods/Services **SHOULD NOT** be received based on the invoice.

Training Hub:

Training Hub

- Leaders should check the MyWorkday dashboard to ensure their teams have completed required training
 - [Workbook: MyWorkday Curriculum Dashboard](#)
- Quick Reference Guides can be found on the [MyWorkday Training Hub](#)



The screenshot shows the 'MyWorkday Implementation' page with a navigation bar containing 'Welcome', 'Cutover', 'Training Hub' (highlighted with a blue box), 'Change Network', and 'Communications'. Below the navigation bar is the 'Training Hub' section with the heading 'Expand the sections below for more information.' and a link to 'Curriculum Completion Dashboard **for Managers Only** (Tableau)'. A list of training resources follows, each with a right-pointing chevron: 'Training Curriculum >', 'Workday Workshop Recordings >', 'What's Happening Videos >', 'Workday Role - Training Guides >', and 'Supplemental Quick Reference Guides (incl. Pegasus Ticket Guides) >' (highlighted with a blue box). At the bottom, there is a partially visible link for 'Central Office Supplemental Quick Guides >'.

Workday Workshop Recordings

- **Purchasing and Receiving in Workday** will be taught:
 - [July 27 @ 3:00pm](#)
 - Monthly
- There are also additional Workday Workshop recordings and resources available on the [Workday Implementation Page](#)

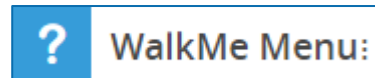
Workday Workshop Recordings ▾

Click below to watch a recording of a previously scheduled Workday Workshop.

Topic	Original Date	Slides	Recording	Q&A
Purchasing & Receiving	Thursday, 4/27	Slides	View Here	
Journal Entries	Friday, 4/28	Slides	View Here	
Expense Reports & Payment Cards	Tuesday, 5/2	Slides		Q&A
Contingent Workers	Wednesday, 5/10	Slides	View Here	Q&A
One-time Payments	Tuesday, 5/16	Slides	View Here	Q&A
Transfers & Job Changes	Wednesday, 5/17	Slides	View Here	
Locations	Tuesday, 5/23	Slides	View Here	Q&A
Deliver-To and Ship-To Locations	Tuesday, 5/23	a subset of the Location Workshop	View Here	QRG
Leaves of Absence Processing	Thursday, 5/25	Slides	View Here	Q&A

WalkMe Extension

- WalkMe 'Guide Me' Assistance is available for key workflows
 - Updating Personal Information
 - Purchasing
 - Receiving
 - Expense Reports
 - Delegation
 - Payroll Costing Allocations
 - PTO

A screenshot of a "Requisition Details" form. The form is titled "Requisition Details" and contains several sections: "Learning Operations" (with a dropdown menu), "Operating Entity" (with a dropdown menu showing "Operating Entity: OEMCA Medical Center Administration"), "Additional Worktags" (with a dropdown menu showing "Function Code: FC23023 Institutional Support - General Administration"), "Deliver-To Location*" (with a dropdown menu showing "2525 WEST END AVE (LOC00248)"), and "Ship-To Address*" (with a dropdown menu showing "2525 WEST END AVE, NASHVILLE, TN 37203, United States of America"). Each dropdown menu has a close button (X) and a menu icon (three horizontal lines). There are also question mark icons next to the "Deliver-To Location*" and "Ship-To Address*" labels.

[WalkMe Add-in Manual Installation & Macs](#)

Questions?

Check-In Survey



CREATING A REQUISITION








Appendix

Ordering Methods

1. **Catalog:** primarily used by clinical staff, same items from Item Master.
2. **Non-Catalog:** primarily used by non-clinical staff.
3. **Supplier Website:** interfaces with ePlus and resembles eProcurement.
4. **Templates:** pre-configured Requisition Templates for clinical supplies & past Requisitions to choose from.
5. **Procurement Favorites:** list of frequently used procurement items that you have marked as favorite.

Ordering Methods

-  [Search Catalog](#)
-  [Request Non-Catalog Items](#)
-  [Connect to Supplier Website](#)
-  [Add from Templates and Requisitions](#)
-  [Select from My Procurement Favorites](#)

REQUISITION TYPES

- **Blanket Order** - Used when a business needs the same goods/services on a recurring basis over a specified period, such as an entire year.
- **Bulk Buy** - Buyer obtains large quantities at lower cost to leverage economies of scale.
- **Capital** - Capital purchases; used to make a substantial investment in long-term fixed assets. This can include purchasing machinery and equipment; land, buildings, or other infrastructure; furniture and fixtures; and software. Requests for capital must first be entered and approved within Capital Planning, where a Capital Request ID will be issued. This Capital Request ID is required for capital requisitions, in addition to a Trackable Spend Category, a Project ID, and a Location ID.

REQUISITION TYPES

- **Equipment Rental** - Tends to be shorter term rentals. An example would be hospital beds.
- **Purchased Services** - Used for a variety of services. Service purchase orders are by amount only and typically configured for 3-way match. Includes consulting and service maintenance agreements.
- **Supplies** - All supplies and general purchases.
- **TMS Facilities** - Used for the TMS facility purchases that require a work order number.



DELIVER-TO/SHIP-TO HEADER

Requisition Details

Location

Location: 2525 WEST END AVE (LOC00248)

Additional Worktags

Function Code: FC23023
Institutional Support - General Administration

Deliver-To Location*

2525 WEST END AVE (LOC00248) > 2525 WENS END AVE STE 1430 (LOC91503)

Ship-To Address*

2525 WEST END AVE, NASHVILLE, TN 37203, United States of America

Currency*

USD

Save **Cancel**

Checkout

Company	Requester	Requisition	Status	Total Amount
Vanderbilt University Medical Center	John Girdler (0143607)	- new -	Draft	10.00 USD

Reminder:

- For [Capital Requisitions](#), enter [Project ID](#) first.
- Next, enter any applicable funding source worktags such as Grant ID or Gift ID.
- Confirm Cost Center ID is accurate.
- Capital Request ID Number issued by the Capital Planning module is required in the Memo field if Trackable Spend Category or Project ID is used on a transaction.

Shipping Address

Deliver-To * 2525 WEST END AVE (LOC00248) > 2525 WENS END AVE STE 1430 (LOC91503)

Ship-To Address 2525 WEST END AVE
NASHVILLE, TN 37203
United States of America

Requisition Information

Request Date * 05/18/2023

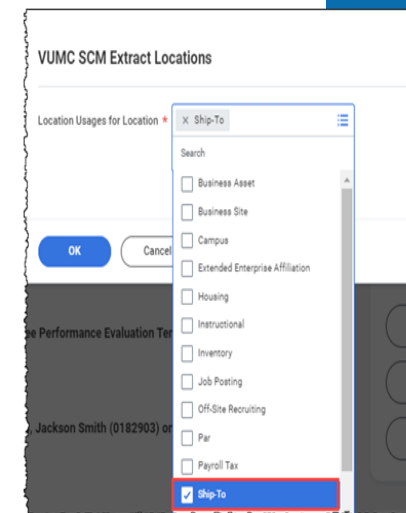
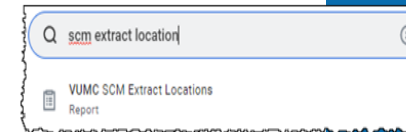


SCM EXTRACT LOCATIONS

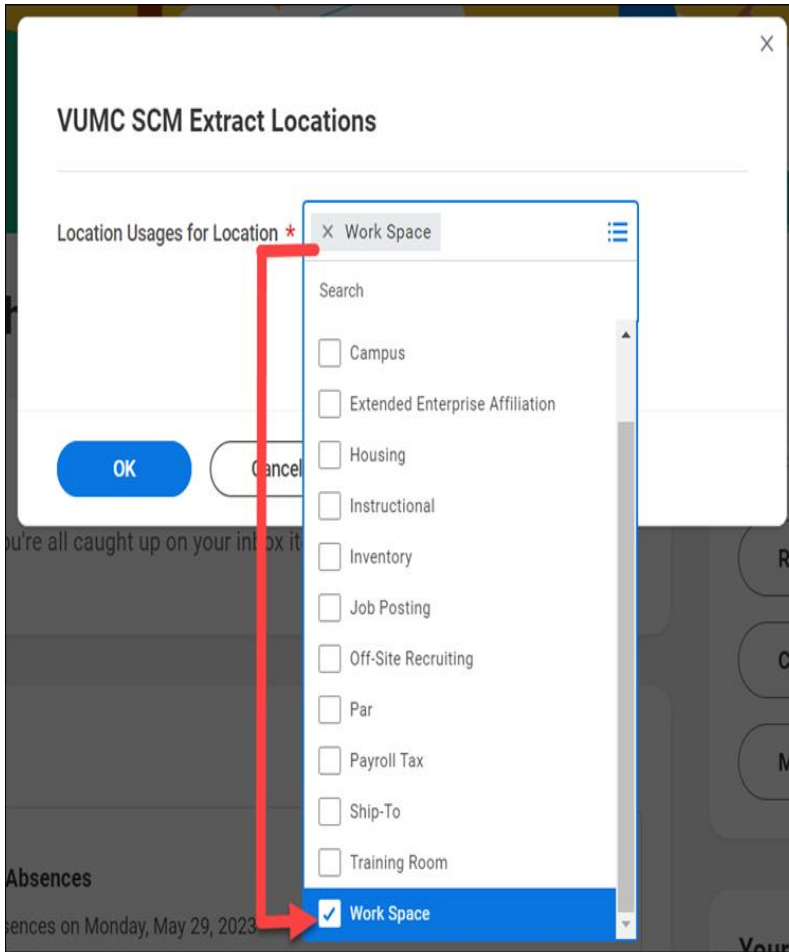
- The **SCM Extract Location** report lists all available Deliver-To Locations and the Ship-To Locations they are attributed to.
- By selecting the **Ship-To** option in the Location Usages filter, all Ship-To locations will be included in the report.

Note: The filter button in the top righthand corner of the report will allow you to filter the results by a specific location.

Reference ID	Location	Location Usage	Location Type	Location Identifier	Location Hierarchies	Superior Location	Primary Address	Primary Address - Full	Ship To Location	Deliver-To Location
LOC00681	100 W 4TH ST (LOC00681)	Business Asset Business Site Ship-To	Ship-To		Ship-To Locations Hierarchy		02440 Maple Lane	02440 Maple Lane COOKEVILLE, TN 38501		VANDERBILT CHILDREN'S CLINIC STE 220 (LOC12388)
LOC00606	1800 S 12TH ST (LOC00606)	Business Asset Ship-To	Ship-To		Ship-To Locations Hierarchy		14107 Maple Lane	14107 Maple Lane MURRAY, KY 42071		
LOC00648	1020 RESERVE BLVD (LOC00648)	Business Asset Business Site Ship-To	Ship-To		Ship-To Locations Hierarchy		64350 Maple Lane	64350 Maple Lane SPRING HILL, TN 37174		CL VMS SPRING HILL COLONRECTAL SURGERY STE 100 (LOC12686) MAURY REGIONAL AFTER HRS CLINIC STE 415 (LOC15115) SPRING HILL PEDI ENT STE 320 (LOC10714) VANDERBILT CHILDREN'S AFTER HRS CLINIC SPRING HILL SITE 110B (LOC10712) VANDERBILT SPRING HILL ADULT UROLOGY STE 320 (LOC10703) More (6)



FILTER BY WORK SPACE TO SEE DELIVER-TO LOCATIONS



The screenshot shows a table titled "VUMC SCM Extract Locations". Below the title, it says "Location Usages for Location Work Space". The table has 3428 items. The table columns are "Ship-To Location", "Deliver-To Location", "Reference ID", and "Location". The table is filtered to show only "Work Space" locations. A red box highlights the "Location" column, which contains the following entries:

Ship-To Location	Deliver-To Location	Reference ID	Location
THE VANDERBILT CLINIC (LOC00130)		LOC10359	10 S AA10S-EULA 10232 VUAH (LOC10359)
THE VANDERBILT CLINIC (LOC00130)		LOC11962	11 BURN CTR - JOHN LAMPMAN VUAH11041 (LOC11962)
1409 W BADDOUR PKWY (LOC02007)		LOC10071	1409 W BADDOUR PKWY (LOC10071)
2120 BELCOURT AVE (LOC00230)		LOC12632	2120 BELCOURT AVE STE 139 (LOC12632)
2135 BLAKEMORE AVE (LOC00216)		LOC15518	2135 BLAKEMORE AVE STE 162 (LOC15518)
2135 BLAKEMORE AVE (LOC00216)		LOC15519	2135 BLAKEMORE AVE STE 163 (LOC15519)

Filter by address, room, suite, floor as needed

Central VUMC Receivers

- Individuals who work in the receiving department.
- Receives all deliveries that come through VUMC and then will deliver to the Deliver-To Locations
- Has access to all receiving functions in Workday and can review all orders
- Uses a Handheld Device to complete many processes



RECEIVING ROLES

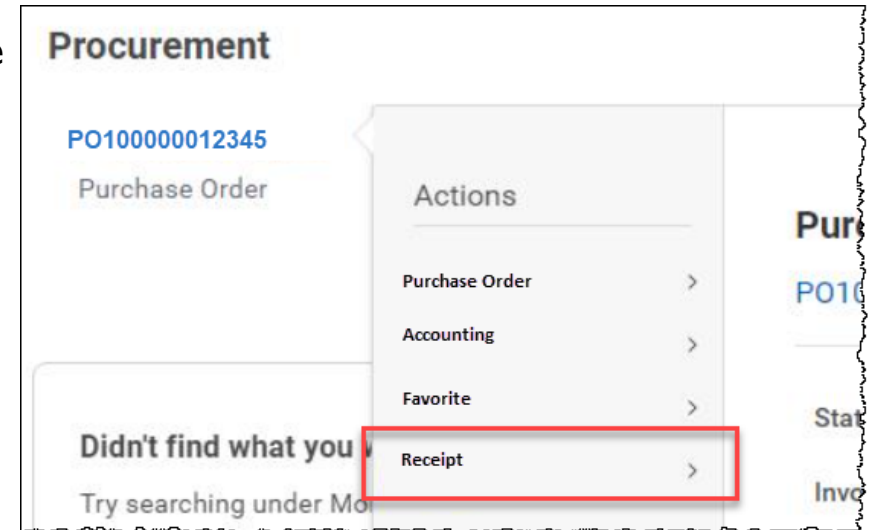


Non-Central VUMC Receivers

- Individuals who work in another department but may order or receive supplies for their department
- Receives only department-specific items
- Only have access to certain necessary functions in Workday
- Uses Workday to complete all processes

VUMC RECEIVER

- eProcurement Creators (Legacy) were given the **VUMC Receiver** role at Go-live
 - Request this security role assignment by submitting a Pegasus Ticket
- **If a PO was created for Goods or Services, creating a receipt is required**
 - Don't wait for invoice – create the receipt once received
 - For Goods:
 - Use quantity
 - For Services:
 - Use dollar amount (estimate amount received)
 - Disbursements needs to know it is ok to pay supplier – creating a receipt triggers the payment
 - Receipt Adjustments should be utilized to make changes to a receipt already processed



RECEIVING NOTES

- Invoices should ideally be sent directly from Supplier to Disbursements
 - Invoices that are sent to Departments can continue to be sent to yumc_electronic_invoices@yumc.org
- Month and Year End Close
 - For received goods or services within timeframe of a month or year, Workday will do an automatic accrual for departments regardless of Accounts Payable processing it in time
- Quick Reference Guide
 - [WDSC-503-Q1 Create a Receipt](#)

workday | **VUMC BUSINESS EDUCATION** Create a Receipt

Central and Non-Central VUMC Receivers are required to create a receipt in Workday when receiving items. This step is required for goods and/or services invoices to be scheduled for payment. After creating a receipt, continue to send the invoice to yumc_electronic_invoices@yumc.org for the invoice to be processed for payment. Follow the steps below to Create a Receipt in Workday.

From the Workday Homepage:

1. Select the **Menu** button.
2. Choose the **Receiving App**.

Note: If the receiving app is not automatically listed for you, select **Add Apps** at the bottom of the list.

3. Select **Create Receipt**.
4. You can enter the **Document Number**, which could be a **Purchase Order** number, or type in the **supplier name** to filter for the Purchase Order. Select the **Appropriate Option**.

Note: If you the shipment was received in full, you can select the **Fully Receive** box as a shortcut.

5. Select **OK**.

From Create Receipt:

1. In the Create Receipt Task, you must input the **Quantity to Receive**.

Note: the **Quantity to Receive** cannot exceed the **Quantity Ordered** or the **Ordered Quantity Invoiced**. You can review the Total Quantity already received if the order is arriving in multiple shipments.

2. Choose **Select Files** under **Attachments** to upload a packing slip. You can also drag and drop the file into this space.

Note: review additional information about the order as needed before submitting.

3. Select **Submit**.
4. Email the invoice to yumc_electronic_invoices@yumc.org for the invoice to be processed for payment.

QUESTIONS?
Please email BusinessEducation@yumc.org.

VANDERBILT UNIVERSITY MEDICAL CENTER 03-15-2023

CAPTURE GOODS DELIVERY

Received by Central Receiving
(Supply Chain)



Label created indicating final Deliver-to Location
(Supply Chain)



Delivered to Requestor
(Supply Chain)



Requestor captures the delivery in Workday,
acknowledging the delivery
(Requestor)

Requestor sees goods have been delivered
(Requestor)



Capture Proof

Received By: Artie Fischel (1111111)

Deliver-To: Mount Juliet, TN

Signee: Artie Fischel

Memo: Delivered 8/8/22

pxels-rodnae-productions-7363116.jpg
✓ Successfully Uploaded!

Confirm Delivery

Goods Delivery Run: GDT0000033-1 Open

PURCHASE ORDER STATUS

- Within a PO you can see the following statuses:
 - PO Payment
 - Documented as **Status**
 - Invoice
 - Receiving
 - Tracking
- The **Business Documents** column at the goods/services line level will show any attached invoices/documents for that line.

The screenshot displays the 'View Purchase Order' interface. At the top, a navigation bar includes tabs for 'Status', 'Issued', 'Invoice Status', 'Partially Invoiced', 'Receiving Status', 'Partially Received', 'Tracking Status', and 'Accepted'. The 'Status' tab is highlighted with a red box. Below this, the interface is divided into three main sections: 'Summary', 'Terms and Taxes', and 'Contact Information'. The 'Summary' section shows details for Purchase Order PO10000040300, including the company (Vanderbilt University Medical Center), supplier (ARGON MEDICAL DEVICES INC), and document date (05/19/2023). The 'Terms and Taxes' section lists payment terms (Net 45) and shipping method (FEDEX STAN). The 'Contact Information' section provides details for the bill-to and ship-to addresses, both located in Nashville, TN. Below these sections, there are tabs for 'Goods Lines', 'Process History', 'Printing Runs', and 'Balances'. The 'Goods Lines' tab is active, showing a table with 2 items. The table has columns for Packaging String, Memo, Location, Business Document Lines, Project, Grant, Gift, Program, *Cost Center, *Fund, *Operating Entity, Work Order, Additional Worktags, and Splits. The 'Business Document Lines' column for the first item (EA/1) is highlighted with a red box, showing a list of documents: POA1026838 - for PO10000040300 - Line 1 (Accepted) and REQ1038906.

Packaging String	Memo	Location	Business Document Lines	Project	Grant	Gift	Program	*Cost Center	*Fund	*Operating Entity	Work Order	Additional Worktags	Splits
EA/1		Ⓞ VCH3 PROC CATH OWNED2 RM 3220 (LOC11503)	POA1026838 - for PO10000040300 - Line 1 (Accepted) REQ1038906					CC00319 MCJCHV Cath / EP Lab	FD001 General Fund	OEMCJCHV Monroe Carell Jr Children's Hospital at Vanderbilt		Function Code: FC23023 Institutional Support - General Administration	

CANCELLATIONS, BACK ORDERS, RE-ORDERS ETC.

- For any of these reasons, if you want to cancel a PO, you should reach out to the Buyer directly via email or vumcprocurement@vumc.org to tell them you want a PO to be cancelled
- Actions to take in these scenarios is based on the way the Supplier is going to react to what I do
 - **Example:** Goods were never received by VUMC and Supplier agrees goods were never shipped

PARTIAL PAYMENTS

Invoices **CANNOT** be partially paid
Purchase Orders **CAN** be partially paid

- These partially paid orders are listed as such in the **Status** field in a PO header.
- For example, imagine there is a blanket order with \$10,000 worth of goods.
 - There have been two invoices created, one for \$500 and another for \$600.
 - The \$500 invoice has been paid and has been received against the \$10,000 PO (which is now in partially paid status)
 - The \$600 invoice has not yet been paid so it is currently a match exception because it is still pending a receipt.

RECEIPT ADJUSTMENT

- The quantity of goods/services received can be edited via a **Receipt Adjustment**
- For example, a blanket order of \$50,000 has been made and all \$50,000 of goods were received accidentally instead of just the \$5,000 of goods that have actually been delivered.
 - This creates an additional \$45,000 expense to your cost center and an additional \$45,000 liability instead of \$5,000.
 - Create a receipt adjustment for \$45,000 so that the received value is reduced to \$5,000.

The screenshot displays the 'View Receipt' page in Workday. The main header shows 'View Receipt' for RCT1039386 for PO100000033971. The interface is divided into several sections:

- Header:** 'View Receipt' with a search bar for 'Find Purchase Orders' and a 'Create Adjustment' button for PO100000033971.
- Left Panel:** 'Purchase Orders' (PO100000033971) and 'Supplier' (GUY BROWN MANAGEMENT LLC). Below this is a 'Goods Lines' section with a search bar and a table of 2 items.
- Right Panel:** 'View Receipt' details including Status (Approved), Company (Vanderbilt University Medical Center), Supplier (GUY BROWN MANAGEMENT LLC), Purchase Order (PO100000033971), Purchase Order Type (Supplies), Currency (USD), and Document Date (05/16/2023).
- Bottom Panel:** 'Receipt Lines' table with 2 items.
- Line Information Panel:** A detailed view of a line item showing 'Quantity to Receive' (22), 'Quantity Ordered' (22), 'Ordered Quantity Invoiced' (22), and 'Total Quantity Already Received' (22).

Company	Receipt Line or Return Line Description	Spend Category	Extended Amount
Vanderbilt University Medical Center	BIC Round Stic Xtra-Life Ballpoint Pen, Medium...more	SC270 Office Supplies	94.16
Vanderbilt University Medical Center	Scotch Sure-Start Shipping Packing Tape, 1.88"W...more	SC270 Office Supplies	14.06

Item Description	Quantity to Receive
BIC Round Stic Xtra-Life Ballpoint P... 031307 Pack	22/22 Pack
Scotch Sure-Start Shipping Packing ... 896404 Pack	1/1 Pack

Field	Value
Quantity Ordered	22
Ordered Quantity Invoiced	22
Total Quantity Already Received	22
Manufacturer Part #	GSM609BE
Supplier Item Identifier	031307
Memo	031307