workday

Weekly Wrap-up

Happy Tuesday Everyone,

For the next two weeks, we're diving deep into all things procurement! Whether you're a seasoned pro or just getting started, we've got valuable insights and updates to help streamline your procurement processes in Workday.

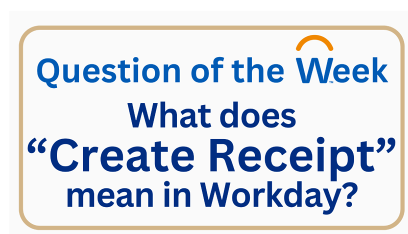
Featured Training Topic

From managing purchase orders to handling supplier invoices and everything in between, we're here to make sure you have the resources and clarity you need to keep things running smoothly.

Resources:

- Purchasing/Procurement Video
- Corporate Procurement Card Video
- Job Aids

What does "Create Receipt" mean in Workday and do I need to add an attachment?



We understand that the term "Create Receipt" can be confusing because a "receipt" can refer to either a statement acknowledging confirmation of *payment* or that *goods have been received*. In Workday, when you "Create Receipt" for goods, you're confirming that the items have been delivered — not uploading a physical purchase receipt.

The receipt process should be completed **when the goods arrive**, not delayed until the task appears. For this step, you just need to enter the quantity or amount of what was received, with no attachment required.

But what about paper receipts?

Paper receipts are not uploaded in the "Create Receipt" step in procurement. You only need to attach receipts to expense reports and when verifying procurement card transactions.

A flowchart outlining the procurement process in Workday is attached for reference. If you have additional questions, feel free to contact our support team or check out the **job aid for step-by-step instructions.**

Who to Contact:
Procurement Office vs. Workday Support

Contact the Procurement Office for issues related to purchase orders, vendor inquiries, furniture purchases, requesting quotes, and procurement policies.

They are your go-to resource for understanding the procurement process and addressing any related concerns.

Contact Workday Support for assistance with performing tasks within the Workday platform, such as navigating features, creating receipts, or verifying transactions.

We can guide you on using the system effectively and troubleshooting any technical issues you might encounter.

Brief Update: My Procurement Card Transaction Verifications

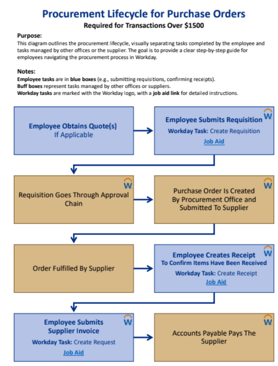
You may have noticed that the heading for *My Procurement Card Transaction Verifications* currently says "Do Not Use." Rest assured, this is being resolved soon, and you do not need to worry about it. Continue to verify your transactions as normal, and we'll provide an update once this minor issue is fixed.

Procurement Lifecycle in Workday

The procurement lifecycle in Workday follows a **structured** process, ensuring efficient handling of orders and payments.

The attached flow charts provide a clear visual guide to the full procurement lifecycle, illustrating the steps for purchases with and without a Purchase Order (PO). They highlight the distinct r**esponsibilities of employees** and those managed by other offices or suppliers.

Tasks assigned to employees, such as submitting requisitions and confirming receipts, are displayed in blue boxes, while tasks handled by other offices or suppliers are shown in buff-colored boxes. Workday-specific tasks are marked with the Workday logo, and links to job aids are included for detailed instructions at each Workday stage.



That wraps up this week's focus on procurement! We hope these resources and insights help you navigate Workday with more confidence and efficiency. Make sure to check your inbox next week as well for part two, where we hone in on Related Actions, Credit Card Transactions, and more!

Have a wonderful Workday!

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