



The Wonderful World of Workday

Requester shortcuts and potholes

Invoices, POs, and requisitions, oh my! We'd like to help you avoid the potholes, and successfully navigate the shortcuts in your Wonderful World of Workday journey. Let's get started. For more information, visit the dedicated Supply Chain page on the Workday SharePoint site: [Supply Chain Management](#).



Shortcut: Paying invoices that pre-date Workday.

- Use the Workday task "Create Supplier Invoice Request."
- Use this job aid: [SCMJA Submit Supplier Invoice Requests](#).



Shortcut: Paying invoices in hand without a purchase order dated 4/1-present.

- Create a requisition to get a purchase order.
- Use the service type and create the requisition for an estimated amount for the remainder of the year for that supplier. This will create a draw-down purchase order number.
- Write the purchase order number on the invoice in-hand and send it to LCMCAP@lcmhealth.org. New invoices for that supplier will use the same purchase order number until all the funds are exhausted.
- Provide the PO number to the supplier for all future invoices.



Shortcut: Creating new purchase orders or services (including for draw-down purposes).

- Create a requisition. For draw-down purposes, enter the requisition for the estimated amount for a period of time.
- When you use the services, provide the PO number to the supplier, so the PO number appears on future invoices to be processed and can be paid in a timely manner.
- See the job aid to create a requisition: [Procurement Requester: Create a Requisition](#).



Pothole: Avoid errors on your ship-to and/or deliver-to address.

- Use your requesting entity when you create a requisition.
- Use this job aid: [Requesting Goods and Services](#).
- If your requesting entity is not there or you are unsure what to pick, put in a ticket at [Workday Support Center](#).
- Access the [New Requesting Entity Request form](#).



Pothole: Avoid creating a requisition from the Requisitions App.

- Create a requisition by typing in the task in the Workday homepage search bar or
- Create a shortcut for the task in your menu.



Pothole: Avoid common misuses by selecting the correct requisition type.

- **Service and Draw Down**– Use this requisition type for actual services or to set up a draw down purchase order.
- **Special Order** – Use this requisition type for supplies, services, and capital outside the realm of normal supplies, services, or capital. For supplies that are non-catalog, use the supply type.
- **Bill Only** – Use this requisition type for **implants only**.
- **Blanket/Standing (Goods only)** -- Use this requisition for standing orders or items that will be shipped several times within a specific period.



Pothole: Avoid changing the address on the punchout site. Leave as is.

- Whatever has been selected as the deliver-to or ship-to address on the requisition in Workday is where it will be delivered.

Have more questions?

Optional office hours calendar invites will be forwarded to you shortly. Feel free to attend any or all sessions to get your questions answered by our LCMC Health Supply Chain data team.

Monday, April 17 1:00p-2:00p [Click here to join the meeting](#)

Tuesday, April 18 2:00p-3:00p [Click here to join the meeting](#)

Thursday, April 20 1:00p-2:00p [Click here to join the meeting](#)

Need additional support? Visit the [Workday Support page](#) for options.

As we continue to identify challenges, we will make enhancements and changes. Please be on the lookout for additional communications.



Scan the QR code with your mobile device for a shortcut to the Workday Quick Links site!