



Process Optimization Feedback & Resources

Website Content

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About This Resource

As part of the Finance Services Transformation, finance staff from Danforth Schools and Central Fiscal Units (CFUs) participated in process optimization meetings to share feedback on current financial processes, identify challenges and explore opportunities for improvement.

The project team is reviewing the feedback gathered through these discussions and identifying next steps. For some of the questions raised, existing university guidance, policies or resources are already available. This page brings those resources together in one place and provides additional clarification on common questions raised during the process optimization meetings.

This page will continue to be updated as additional feedback is reviewed and addressed.

Supplier Setup & Changes

How can I determine whether a supplier already exists in Workday?

Before requesting a new supplier, users can verify whether the supplier already exists in Workday. Guidance for verifying suppliers is available through Workday@WashU.

Resource: [Supplier Accounts in Workday](#)

Who is responsible for communicating with suppliers?

The school, department or unit that has the relationship with the supplier is responsible for supplier communication and follow-up.

How can I track a supplier request after it has been submitted?

Requests submitted through Workday can be viewed through the **My Requests** in the Requests application. Additional information about the Requests application is available in the Workday Applications reference guide.



Resource: [Workday Applications](#)

What should I do when supplier information needs to be changed?

Supplier changes and payment requests are separate processes in Workday. If a supplier change is identified during the payment process, a separate Supplier Change Request must be submitted.

Resource: [Supplier Change Request](#)

Why can supplier setup sometimes take longer than expected?

Accounts Payable processes supplier setup requests as they are received, but completion depends on receiving all required forms and documentation from the supplier. All required information must be received before setup can be completed.

Resource: [Paying for Goods and Services](#)

Purchasing & Supplier Invoices

Where can I find requests I have already submitted?

Requests submitted in Workday can be viewed through **My Requests** in the Requests application. Requests submitted to the Workday Support Team through ServiceNow are available under **My Items** in the ServiceNow portal.

Resource: [Workday Applications](#)

When should a Supplier Invoice Request be used?

Supplier Invoice Requests are intended for specific circumstances when a purchase order is not appropriate. Existing Workday guidance provides information about when and how to use a Supplier Invoice Request.

Resource: [Create Supplier Invoice Request](#)

What documentation is required when creating a purchase order?

Documentation requirements are built into the purchase order process to maintain an appropriate audit trail. The Workday purchase order tutorial provides guidance on creating a purchase order and submitting supporting documentation.

Resource: [Create Purchase Order](#)



ProCard

Where can I find guidance on appropriate ProCard use and requirements?

WashU's Procurement Card Program provides guidance on appropriate ProCard use and requirements, including information to help determine when a ProCard is an appropriate payment method for a purchase. ProCard activity is also audited centrally throughout the year.

Resources:

[Procurement Card Program](#)

[Procurement Card Application](#)

How are ProCard limit changes handled?

Requests for ProCard limit changes are submitted through Workday and reviewed and processed as they are received.

Resource: [Workday Applications](#)

Internal Service Deliveries (ISDs)

Who receives an ISD for review?

ISDs are routed to the Cost Center Internal Service Delivery reviewer, with additional reviews based on the worktags included in the transaction, consistent with other financial transactions.

Can reviewers make corrections directly to an ISD?

Existing Workday guidance outlines the ISD review process, including how corrections should be handled.

Resource: [Review Internal Service Delivery](#)

What should I do if an ISD approval needs to go to someone other than the usual approver?

Workday delegation is intended primarily for temporary situations. Depending on the circumstances, a security assignment or use of an ad hoc approver may be more appropriate.

Resource: [Manage Delegations](#)

How frequently should ISDs be initiated?

WashU's updated Internal Service Provider Policy includes guidance on the expected frequency for initiating ISDs.

Resource: [Internal Service Provider Policy](#)



Customer Contracts, Billing & Cash Sales

Where can I find guidance on customer contracts and recurring billing?

Workday provides functionality for customer contracts, billing schedules and invoices. Existing guidance explains how billing schedules and invoices can be created through customer contracts.

Resource: [Customer Contracts in Workday](#)

Are updates being made to customer contract guidance?

Yes. Workday documentation is currently being updated, and additional guidance identified through the process optimization meetings will be incorporated into those updates.

Should invoicing follow the same schedule across all areas?

No. Some variability in invoicing schedules is necessary to meet different university needs.

When should I use a customer invoice rather than a cash sale?

Existing Workday guidance explains when and how customer invoices should be used. Cash sales are used when a customer invoice is not needed.

Resources:

[Customer Invoices in Workday Reference Guide](#)

[Record Cash Sale](#)

Are individual customers associated with cash sales?

No. Cash sales are not attributed to an individual customer. Transactions that need to be associated with a customer are handled through a customer invoice.

Resource: [Record Cash Sale](#)