WORKDAY DEPARTMENT PROCUREMENT DATA ENTRY SPECIALIST ROLE

You have been assigned the role of **Department Procurement Data Entry Specialist** by your Cost Center Manager (CCM).* This message contains information specific to your role.

BUSINESS PROCESSES YOU CAN INITIATE:

- Create Purchase Order
- Create Change Order
- Create Supplier Invoice
- Create Supplier Request
- Verify Procurement Card (PCard) Transactions

TRAINING
To register for Workday training, click on the course links below:

- **Workday: FDM** - *CBL*
- **Workday: Check Requests** - *CBL*
- **Workday: Reporting for Data Entry Specialists** - *CBL*

For training on Workday's procurement processes, please contact your purchasing department:

- **Purchasing (Academy/MSOM)**
- **UHealth Supply Chain Services**

REPORTS

- Find Procurement Card Transaction Verifications
- Find Purchase Order Line and Line Splits for Organization
- Find Purchase Orders
- Find Requisition Line and Line Splits for Organization
- Find Suppliers
- Match Exception with Reasons *(FIN-P2P-Match Exception with Reasons by Organization)*
- *My Requisitions*
- POs with Open Encumbrances by Organization *(FINP2P-POs with Open Encumbrances by Organization)*
- Supplier Invoice Lines by Organization *(FIN-P2PSupplier Invoice Lines by Organization)*

REQUEST SECURITY ROLE ACCESS

To request a change in security role access in Workday, visit the **Forms** tab on the Workday website to download and complete the appropriate Security Roles Form(s).

TIP SHEETS & SMART WALK-THRUS

The following tip sheets and Walk-Thrus can be accessed within Workday by clicking the orange **Need Help?** icon:
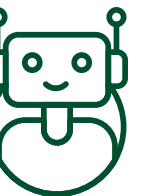**Tip Sheets:**

- Correct Company Selected on PCard Verification
- Correct Company Selected on a Purchase Requisition
- Find Purchase Order Line and Line Splits for Organization
- POs with Open Encumbrances by Organization
- Supplier Invoice Lines by Organization
- Workday Finance Reports Matrix

Smart Walk-Thru:

- Close Purchase Order
- Create Requisition – Catalog Goods/Punch Out
- Create Requisition – Non-Catalog Items
- Create Supplier Invoice
- Create Supplier Request
- Initiate a Change Order
- Locate Payment Details for a PO
- Match Exceptions
- Verify Procurement Card (PCard)Transactions

RESOURCES

- **Business Process Approval Workflows**
- **Frequently Asked Questions (FAQs)**
- **Tip Sheets & Interactive Guides**
- **Workday Updates**
- **Data Audit - Cost Center - Company Crosswalk**
- **Reports in Workday**

Transform your workday U

*To identify your CCM, please view the **Security Roles** tip sheet.
If you have any questions, please contact the UMIT Service Desk: (305) 284-6565 or **help@miami.edu**

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