workday.
UPDATE

Transform your workday

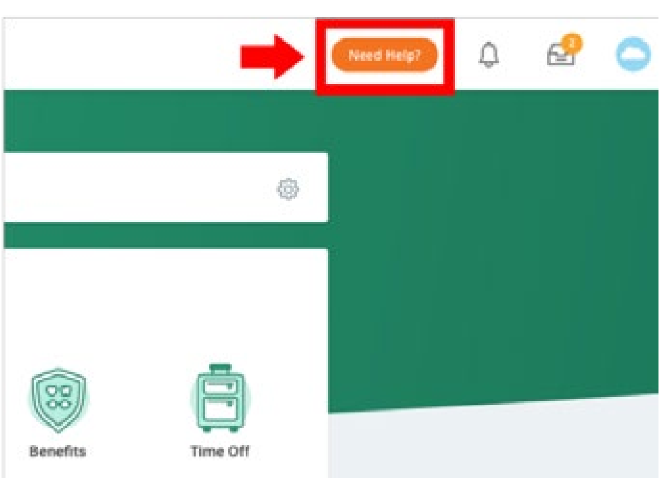
The Latest Workday News, Announcements, and System Updates **November 2019**

More *WalkMe for Workday* Interactive Navigational Guides Coming Your Way

The first phase of ***WalkMe for Workday***, the new smart tool that intuitively explains Workday business processes (BPs), launched in late October with 22 *Smart Walk-Thrus*. Additional *Smart Walk-Thrus* will be available beginning in November as part of ***WalkMe for Workday*** phase two.Similar to the first phase, this next batch of *WalkMe Smart Walk-Thrus* explains BPs across the following categories – Expenses, Procurement, HR, and Basic – and also adds *Walk-Thrus* for the category of Payroll Accounting.

Luz Gutierrez, a clinical program coordinator in the Department of Pathology at the Miller School, recently clicked on a *WalkMe Smart Walk-Thru* for the first time – and loved it.

"I haven't been doing many Change Orders recently and drew a blank on how to do it," Gutierrez explained. "I went to WalkMe, and I love how each step of the process pops up to guide you. WalkMe is a super tool for people when it comes to Workday."



The WalkMe for Workday plugin was installed automatically on most University computers. Those with Macs were instructed on how to install the plugin themselves. The orange "Need Help?" icon on your Workday page indicates availability. Click it to open a drop-down menu of available guides.

The following *Smart Walk-Thrus* were added in November are: Grants: Assign Costing Allocation; Grants: Create Payroll Accounting Adjustments; Create Supplier Request/Invoice for Check Requests; Assign Costing Allocation; Assign Costing Allocation Tasks; Create Payroll Accounting Adjustment; and Request Time Off.

Over the next several months, more than 20 additional interactive *WalkMe Smart Walk-Thrus* will become available, including a few that will use a Chatbot function.
WalkMe smart guides will continue to complement existing Workday tip sheets and, ultimately, replace them.

A WalkMe for Workday survey will be sent in December to gauge feedback from those who have used the tool in order to optimize this new process.

For any questions, please contact the UMIT Service Desk at: (305) 284-6565 or help@miami.edu.

My Awards Portfolio Dashboard – Grants Data at the Click of a Button

The My Awards Portfolio Dashboard, which launched November 1, provides a complete solution to Awards tasks. Now, a range of Workday roles can view aggregated award data and an overview of research reports at one easy location.

Tracy Ehrlich, senior manager with Sponsored Programs, accessed the new dashboard recently and was delighted by the trove of information available – all at the click of a button.

Workday Roles with Access:
Principal Investigators
Co-Principal Investigators
Grant Managers
Cost Center Managers
Cost Center Sponsored Managers

"When the new dashboard came up on my desktop and all of my InfoEd Proposal Development [University' grants routing and tracking system] awards for several fiscal years were there – well, that's very exciting for me," said Ehrlich, who manages grants for all the College of Arts and Science departments (except psychology). "Previously you had to go through a range of reports to get all this. I can just imagine if my boss or the dean gets it on their desktop, it's going to be a great tool."

The Office of Research Administration (ORA) and Enterprise Business Solutions (EBS) teams partnered to create this dynamic update that facilitates the retrieval and analysis of University research portfolios.

My Awards Portfolio Worklets	
My Active Awards	*Identifies the budget vs. actuals for a PI's active awards.*
My Expiring Awards	*Identifies the PI's expiring awards.*
My Award Proposals	*Identifies all award proposals for a PI regardless of status.*
Tasks Awaiting My Approval	*Identifies various business processes awaiting the PI's approval.*
My Award Purchases	*Identifies purchases for the PI's active awards.*
Clinical Trials	*Identifies the cash, actuals, and cash balance for a PI with Clinical Trials.*

To learn more, please view this My Awards Portfolio tip sheet.

If you have one of the above specified Workday roles but cannot see the dashboard, contact workday@miami.edu.

For questions about the data and/or Sponsored Projects, please contact ORA at 305-284-9733 or email ORA-SI@miami.edu.

Workday Microlearning: Enhanced Journal Line Detail Report

DID YOU KNOW?

This comprehensive report displays one or multiple journal lines, over 50 columns of data - and all at a glance!

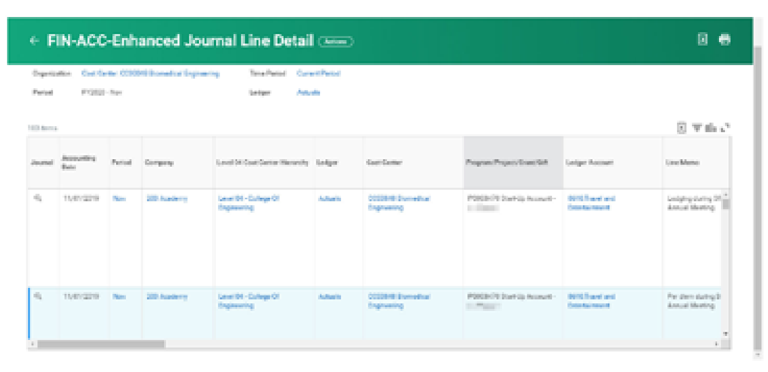
Enhanced Journal Line Detail Report: *Your All-in-One Financial Report*

Available to a wide range of Workday roles. Click here for tip sheet.

·Complete required prompts

·Download report info to Excel

·Easy to sort



Required Prompts > **Organization, Period, Time Period**

Optional Prompts > **Book; Journal Number; Status; Accounting; Date Range; Source; Originated or Approved By; Ledger Accounts; Amount Range; Worktags and whether the journal line is related to an Adjustment; Recurring, Reversed or Intercompany Journal**

Jaggaer/UMarketplace, Use Chrome Browser

MIAMI MARKETPLACE

University and staff who access UMarketplace, powered by Jaggaer, are reminded to use the Chrome browser. The newest Jaggaer release, launched in early November, no longer supports access via Internet Explorer versions 6-10.

Coming Soon: Super User Certification Program Series 3 - Including Two New Training Tracks

Workday Super User Certification Program Series 3, which will launch in January and runs through May 2020, will offer two new training tracks: Human Resources Business Process Initiator (HR BPI) and Cost Center Manager (CCM).

Nominations for HR BPI will open in December 2019 and for CCM in January 2020. More information about these tracks and Series 3 will be shared soon.

Series 2, which runs from September 2019 to January 2020, enrolled 53 new Super Users, 28 for the Expense Data Entry Specialists (EDES) training track and 23 pursuing the Procurement Data Entry Specialists (PDES) track.

Next Workday Roundtable Meeting

Be advised that the Gables and UHealth Workday Roundtables, which previously occurred separately, are being consolidated into a single quarterly Workday Roundtable Meeting. The next meeting will take place Thursday, February 13, 2020. Please mark your calendars.

Attendees will have the option to attend either in person or virtually. More details will be shared in January, including location details and a link to attend virtually.

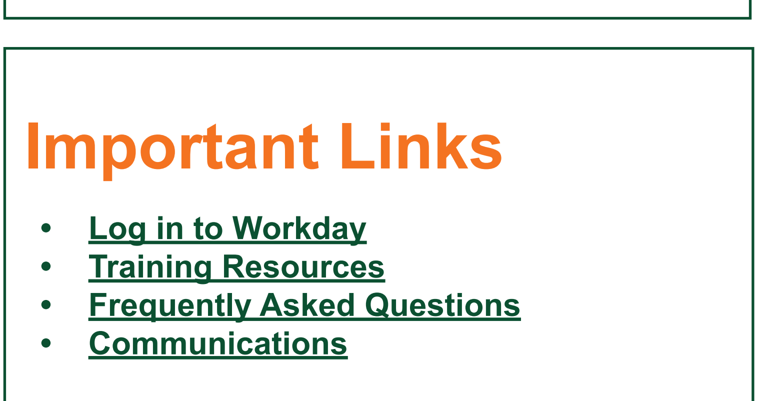
Transform your workday

Be advised there will be no Workday Update for December. Stay tuned for the first new edition in 2020.

To stay current on the latest Workday announcements, news, and updates, be sure to subscribe to the monthly Workday Update newsletter.

System Changes

Click here for a comprehensive list of completed and in-development system changes.



Important Links

- **Log in to Workday**
- **Training Resources**
- **Frequently Asked Questions**
- **Communications**

Role-Based Resources

Role-based resources, including relevant tip sheets, reports, and training options, have been updated and are available for the following Workday roles:

- Accountant
- Cost Center Manager
- Cost Center Sponsored Program Manager
- Deposit Specialist
- Expense Data Entry Specialist
- ISP Analyst
- ISP Manager
- Procurement Data Entry Specialist
- Receiver

To learn more information specific to other Workday roles, please click here.

If you have questions related to Workday, please contact the UMIT Service Desk at:
(305) 284-6565 or **help@miami.edu**.

Connect

We value your feedback. Got an idea to share? A Workday item you'd like to know more about?
To subscribe to this message, please contact us at: workday@miami.edu
using the subject line "Subscribe to Workday Update."