

OCTOBER

Spotlights:

On Sunday, October 29, Workday Finance went live at University of Miami Hospital (UMH). Changes include:

- McKesson will be used for clinical purchases
- Workday will be used for capital and non-clinical purchases, expense reimbursements and P-Card reconciliations
- Lawson will be used for general ledger

This implementation will improve the ordering of non-clinical supplies at UMH and appropriate expense reimbursements. Please read the "Workday 1.5" section to learn more.

A special thank you to Cost Center Managers (CCMs), the Finance Business Process Initiators (FBPIs), Senior Business Officers (SBOs), and the Finance User Network (FUN) who have continued to assist post go-live. The Workday Finance project team is working closely with central offices and departments to identify additional training and any configuration changes, if applicable.

As of Monday, October 30, the UMIT Service Desk has processed more than 2,802 tickets, and have resolved 2,632 total tickets for 949 unique users across the University. The Workday Finance team, Workday Human Resources Information System (HRIS) team, Business Intelligence (BI) team, and Change Management team, in cooperation with the UMIT Service Desk, continue to monitor Service Desk tickets and issues centrally to assist in any way possible.

If you missed training before go-live, please visit the [Workday Finance Training Catalog](#) to review the list of available training classes through October.

- Theresa Ashman



Help and Support

Drop-In Labs to practice business processes will be available on the Coral Gables, Medical, and the Rosenstiel School of Marine and Atmospheric Science (RSMAS) campuses through the end of November. Drop-in labs are a great way to get hands-on experience in Workday.

For the full schedule of Drop-In Labs, please click [here](#) (please note: you do not have to register to attend a Drop-In Lab).

If you have any questions, click [here](#) to review frequently asked questions (FAQs) about Workday Finance.

For further assistance, please contact the UMIT Service Desk: (305) 284-6565 or help@miami.edu. Please provide as much detail as possible to ensure your incident is triaged effectively.



Role-based Resources

Role-based resources are now available for the following Workday roles:

- Accountant
- Deposit Specialist
- Expense Data Entry Specialist
- ISP Analyst
- ISP Manager
- Procurement Data Entry Specialist
- Receiver

To learn more information specific to other Workday roles, click [here](#).



Changes to Workday HCM

The following changes are in progress but will most likely be completed in November:

Onboarding - Timekeeper Link: Currently, new employees do not receive timekeeping instructions for the Workday system. Configuration is taking place to provide instructions to those employees that will be required to enter time in the Workday system as part of the Onboarding process.

Assign Costing Allocation: Currently there are no communicated guidelines for Costing Allocation end dates. To ensure data integrity, particularly with respect to the annual merit increase process, HRIS will be modifying this business process to ensure Costing Allocation end dates are within the respective fiscal year.



Workday 1.5

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Resources:

- Click [here](#) to review tip sheets currently available to assist in completing Workday business process related to UMH.
- UMH Host to Lawson Crosswalk
 - Click [here](#) for a list of identified contacts to initiate Workday non-clinical and capital purchases and appropriate expense reimbursement.
- UMH Drop-In Labs
 - Drop-In labs are a great way to get hands-on assistance in the Workday system. For the full schedule, please click [here](#) (Please note: you do not have to register to attend a Drop-In Lab).



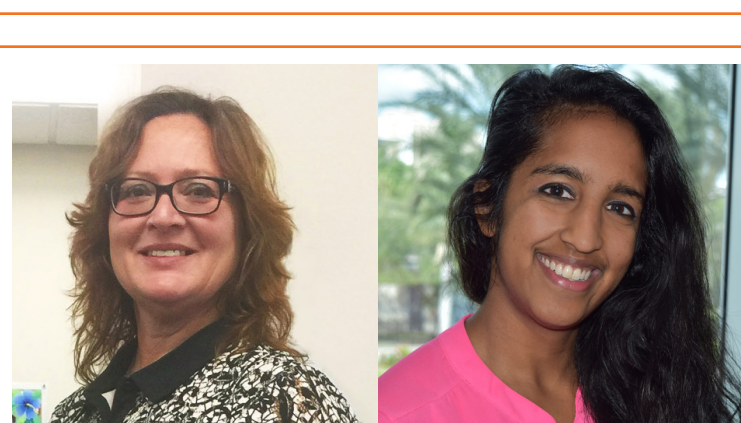
Register for Workday Finance Training

Please continue to encourage your staff to attend training.

Visit the [Workday Finance Training Catalog](#) to review the list of available training classes.

Sessions are offered on the Coral Gables, Medical, and the Rosenstiel School of Marine and Atmospheric Science (RSMAS) campuses through the end of November.

Important: You will not be able to register until you complete the **required** Workday Financial Data Model (FDM) 101 online Computer Based Learning (CBL) module. To register, visit [ULearn](#) and search for the keyword: "FDM101," or by the complete course name: "Workday FDM 101." Completion of the previously offered FDM 101 webinar satisfies this requirement.



Diana Arnal

Ayushi Argwala

Meet the Team

Each month, the Workday Finance Team would like to introduce you to two different members of the team. This month, meet Diana Arnal and Ayushi Argwala.

Diana Arnal is an Enterprise Resource Planning (ERP) Developer with the Integrations team. She is a technical resource currently focused on the development of Workday integrations. She also oversees integrations work on the Boomi platform and other projects such as the implementation of FAMIS cloud and FUSION, among others.

The Workday Finance implementation is Diana's third implementation in the past five years. Diana was raised in Bronx, New York until she relocated to Miami, Florida with her family when she was eleven. The transition left her with a unique accent influenced by Cuban parents and the remnant of living in an Italian neighborhood.

Diana earned her Bachelor's Degree in Computer Science from the University of Florida and her Master's Degree in Management Information Systems from Florida International University. When she is not at work, Diana enjoys spending time with her husband, Will, and their two rescued dogs, Jessie and Jia. Will and Diana watch football games together in a symbiotic Cane/Seminole relationship. Diana has also always had a passion for running, having completed two marathons and numerous half-marathons and triathlons.

Ayushi Argwala is a Deloitte Consultant for the ERP Change Management Team. She determines curriculum requirements and training logistics for knowledge transfer before and after implementation, while also identifying a mitigation strategy for common issues and potential system fixes. Ayushi commutes weekly from Dallas, Texas. Though her family has its roots in India, Ayushi was born and raised in Texas. She remained in Texas to earn her Bachelor's Degree in Finance from the University of Texas at Austin.

Away from the office, Ayushi enjoys running, traveling through national parks, and exploring the local restaurants in each city that she visits. Her music preference is country and hip-hop. To someone looking for a good read, Ayushi recommends any John Grisham novel. Her review of John Grisham passionately stamps him as "a phenomenal writer with unique stories." Ayushi is thinking ahead to 2018 and has already made a New Year's Resolution to learn how to cook – she wants to expand her expertise beyond PB&J and tacos.



Workday Finance Tips and Tricks

Investigator (PI) Role Added to Approval Loops

As of Monday, October 23, in response to feedback from research faculty, the Principal Investigator (PI) role in Workday was configured with an approval step in the approval workflow for the following business processes:

- Purchase Requisitions, Change Orders, Ad Hoc Payments, Check Requests, and Procurement Card Reconciliations
- Travel and Expense reimbursement (Workday process - Expense Report)
- Interdepartmental requisitions (Workday process - Internal Service Delivery (ISD) Documents)

Please note this change will only impact new business processes initiated on or after Monday, October 23.

Upon receiving the task in their inbox, PIs can either:

1. **Approve/Send Back/Deny Task** – This allows a PI to choose to approve, send back, or deny the submission
- OR
2. **Delegate Task** – This allows a PI to give access to another user to initiate and/or approve tasks in Workday on their behalf.

To learn how to access and complete tasks, please review this [tip sheet](#).

The report FIN-ACC-Cost Center for all Drivers is now available for all employees. This report returns driver Worktags (Grant, Basic Gift, Endowed Gift, Project, Program) for Cost Center(s). To learn how to run reports in Workday, click [here](#).

Business Intelligence (BI) Reports: October 2017 Release

To learn about new fields and reports available in the October 2017 release, including how to run the Journal Transaction History and Journal Posted Details reports, click [here](#).

Create New Expense Report

Learn how to create an Expense Report to request reimbursement for expenses, reconcile Travel Card transactions, itemize or split cost for items, and find related reports, please review this [tip sheet](#).

Delegation

To learn how to delegate your inbox, assign other employees to start tasks on your behalf, delegate a task, stop delegation, and act on someone's behalf (instructions for delegates), please review this [tip sheet](#).

Reimbursements

To reimburse an individual who is a one-time visitor to the University of Miami and is not likely to be reimbursed again, complete the [Non-Employee and Student Expense Reimbursement Form](#) (Please note: this form is not meant for processing taxable payments [e.g. honoraria]).

Tip: If reimbursing the same student or non-employee more than once, use the Check Request business process. To learn how to request a check, including creating a payee in Workday and setting up a payment, click [here](#).

Finance Reports in Workday

To learn how to run reports in Workday and about Finance reports available by security role, please review this [tip sheet](#).

Security Roles

To learn about Security Roles and role assignments, please view this [tip sheet](#). Note: All security roles can only be requested by Cost Center Managers or Senior Business Officers.

Verify Procurement Card (PCard) Transactions

To learn how to reconcile purchasing card (PCard) transactions (for yourself or on behalf of other employees), split costs between multiple Spend Categories or Driver Worktags, and find related reports, please review this [tip sheet](#).

Download: Workday Finance Security Role Request Form - Initiator & Reviewer Roles

This form is used to request a change in an employee's security role access for **Initiator & Reviewer Roles** (e.g. Department Accountant, Finance Reviewer) in Workday. Please complete the form and scan and email to help@miami.edu using your UM email account.

Download: Workday Finance Security Role Request Form- Approver Roles

This form is used to request a change in an employee's security role access for **Approver Roles** (e.g. Cost Center Manager, Program Manager) in Workday. Please complete the form and scan and email to help@miami.edu using your UM email account.

To learn more tips and tricks, please click [here](#).

Important Links

- [Log in to Workday](#)
- [Finance Advisory Board](#)
- [Finance Advisory Councils](#)
- [Training Resources](#)
- [Workday Finance Frequently Asked Questions](#)
- [Communications](#)

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

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