WORKDAY EXPENSE DATA ENTRY SPECIALIST ROLE

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

Business processes you can initiate:
- Create Expense Report
- Create Spend Authorization
- Check Supplier Request/Invoice (formerly eChecks)

Tip Sheets:
- Create Expense Report
- Create Expense Report (UMH)
- Create Expense Report for Per Diem
- Create Expense Report for Per Diem (UMH)
- Create Expense Report from Spend Authorization
- Create Spend Authorization
- Create Supplier Request/Invoice for Check Requests
- Non-Employee and Student Reimbursement Form
- Workday Finance Reports Matrix

Reports
To find the following Reports in Workday, search the name in the search bar:
- “Find Expense Report Lines for Organization”
- “Find Spend Authorization Lines for Organization”

Training:
To register for Workday’s curriculum (mixed – both instructor-led training (ILT) and computer-based learning (CBL) courses available), log into ULearn and search by the complete course name:
- Workday Financial Data Model (FDM) 101 CBL
- Workday: Expenses
- Workday: Check Requests (Formerly eChecks)
- Workday Foundational Concepts CBL

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

Support Materials:
- Frequently Asked Questions (FAQs)
- FRS/FDM Conversion Tool
- Business Process Approval Workflows
- Tip Sheets and Tutorials
- Finance Reports in Workday
- Workday Finance Glossary

*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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