WORKDAY PROCUREMENT DATA ENTRY SPECIALIST ROLE

You have been assigned the role of **Procurement Data Entry Specialist** by your Cost Center Manager (CCM).*

This message contains information specific to your role.

### Business processes you can initiate:
- Create Change Order
- Create Supplier Request/Invoice (formerly eChecks)
- Verify Procurement Card (PCard) Transactions

### UMH Specific:
- Create Purchase Requisition

### Tip Sheets:
- Close Purchase Order
- Create Change Order
- Create Supplier Request/Invoice for Check Requests
- Create Supplier Invoice for ACH Payment and Wire Transfer Requests
- Verify Procurement Card (PCard) Transactions
- Create Change Order (UMH)
- Create Purchase Requisition for Catalog Goods (UMH)
- Create Purchase Requisition for Non-Catalog Goods (UMH)
- Create Purchase Requisition for Services (UMH)

### Reports
To find the following **Reports in Workday**, search the name in the search bar:
- “Find Requisition Line and Line Splits for Organization”
- “Find Procurement Card Transaction Verifications”
- “Find Purchase Order Line and Line Splits for Organization”
- “Find Supplier”
- “Match Exception with Reasons”
- “POs with Open Encumbrances”
- “Supplier Invoice Lines by Organization”

### 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

### Training:
To register for Workday's curriculum (mixed – both instructor-led training (ILT) and computer-based (CBL) courses available), log into ULearn and search by the complete course name:
- Workday Financial Data Model (FDM) 101 CBL
- Workday: Procurement
- 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).

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*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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