Please note the "Workday Finance Update" will transition to a bi-monthly update for 2018. For continued updates about Workday Finance, please visit the Workday Finance Website.

Workday Finance Next Steps

Workday Finance went live in September of last year. The Workday leadership team appreciates all those that participated in this important initiative. A special thank you to stakeholders, leaders, faculty, and staff who spent countless hours preparing for the transition to the Workday Finance system before go-live.

Since go-live, we have received valuable feedback from faculty and staff across the University. To address those concerns, the Enterprise Resource Planning (ERP) Executive Steering Committee (ESC) announced four key areas of focus for the project based on this feedback. For reference, please see the announcement here.

In this post-launch phase, the project team is working diligently to optimize Workday system capabilities and stabilize the overall system and processes.

Workday Drop-In Labs are scheduled on the Coral Gables, Medical, and Rosenstiel School of Marine and Atmospheric Science (RSMAS) campuses through the end of February 2018. Drop-in labs are a great way to get hands-on-experience 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).

Role-based training will continue to be available through 2018. Please visit the Workday Finance Training Catalog to review the list of available training classes.

Workday Security 102: Cost Center vs. Driver Worktag Roles

This ninety-minute recorded webinar provides an overview of how roles are assigned to individual units, Cost Centers or Cost Center Hierarchies vs roles assigned to Driver Worktags, and Workday Security Roles in Reports, the University of Miami's dynamic business Intelligence (BI) portal. To launch this Computer-Based Learning (CBL) module, visit ULearn and search for the keywords: "Security Roles."

This webinar is specifically for Cost Center-assigned roles (Finance Reviewers, Cost Center Managers, Cost Center Sponsored Program Managers, Senior Business Managers, and Senior Business Officers). Please note this recorded webinar is not intended for those who only have initiating roles (e.g. Purchase Data Entry Specialists, Accountant, Receivers, Deposit Specialists, etc.).

Business Intelligence (BI) Update

This one-hour session covers valuable information about standard and Ad Hoc reports, provides an overview of reports with Budget, Eliminations, Obligations, and Commitments, and also provides a review of phase 2 and 3 with CaneLink student and Workday Human Capital Management (HCM) data.

To launch this Computer-Based Learning (CBL) module, visit ULearn and search for the keywords: "BI Update."

Workday Finance Grants 102 Training

This one-hour training covers valuable information about Award vs Grants in Workday, billing and invoicing, budget, subawards, reports, and using Grants in HCM/Payroll transactions.

To launch this Computer-Based Learning (CBL) module, visit ULearn and search for the keywords: "Grants 102."

Role-Based Resources

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

- Accountant
- 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.

Meet the Team

Each month, the Workday Finance Team would like to introduce you to two members of the team. This month, meet Arletti Bichara and Rafael Toll.

Arletti is an ERP Developer on the Grants Team, with a focus on conversions. She extracts data from the legacy Sponsored Programs Management (SPM) system and builds iLoads into Workday. She also has post-production duties involving business process updates and reassignments. Arletti was born in Cuba, but left at the age of six. She spent her next four years in Puerto Rico before eventually moving to Miami. She made Miami home base, staying local to further her education at UM, which she proudly describes as "the best university in the world". Arletti has a bachelor's degree in business administration and a master's degree in computer information systems. When Arletti is not working, she enjoys travelling, gardening, and cheering on her two teenagers at their soccer tournaments. Her kids have been playing soccer from an early age and now travel throughout Florida and out-of-state for competition. For a good movie, Arletti prefers a character-driven story based on true events and noted the blockbuster hit, Titanic is one of her favorites. Arletti's secret joy is singing along to dance, pop, and freestyle music.

Rafael is an ERP Business Analyst on the Integrations Team. He supported the transition from Ariba and FRS to Workday and continues to support integrations for procurement, JAGGAER, travel reimbursement, facilities, SPM, and HCM. Rafael was born and raised in Guantanamo City, Cuba. He earned his bachelor's degree in electrical engineering from Universidad de Oriente in Santiago de Cuba, his master's degree in management of information systems from Florida International University, and his professional teaching certifications in math and computer science through Florida and Miami-Dade College. At home, Rafael doubles as a handyman and gardener. He takes care of his wife's collection of more than 50 roses, and other succulent plants, and grows tomatoes, bell peppers and lettuce. No matter the task, Rafael can't work without playing classical or similar subliminal background music. While his favorites are Bach, Enigma, Secret Garden, and Kitaró, he is also a firm believer that all music genres have moments of greatness, from Debussey (a 19th century French composer) to Pitbull. Rafael also enjoys traveling and going on short hikes. His last hike was in Cinque Terra, Italy.

Ask the Experts Webinar - Friday, February 2 at 11 a.m.

This one-hour webinar will provide an overview of how to process changes to a Purchase Order (PO), reimbursements, and verifying Procurement Card (PCard) Transactions. To register, please visit ULearn and search for the keywords: "Ask the Expert."

This session is specifically for Cost Center Managers (CCM), Senior Business Managers (SBM), Senior Business Officers (SBO), Finance User Network (FUN) members, Financial Reviewers (FR), Procurement Data Entry Specialist (PDES), Expense Data Entry Specialist (EDES), and Cost Center Sponsored Program Managers (CCSPM).

Workday Finance Tips and Tricks

Click here to access Workday Finance Tip Sheets and Tutorials or search the name of the tip sheet in the specified category.

- **Assign Cart in UMarketplace**
  Learn how to assign a cart to someone else in UMarketplace, retrieve a cart that has been assigned to you in UMarketplace, and/or complete the cart in Workday. To view this tip sheet, click here or search under "Procurement."

- **Business Intelligence (BI) Report: December 2017 Release**
  Learn about new fields and reports available in the December 2017 release, including how to run the Financial Budget Management and GAAP Financial Budget Management reports. To view this tip sheet, click here or search under "Reporting."

- **Create Change Order**
  Learn how to process changes to a Purchase Order (PO) that has already been issued for goods or services. To view this tip sheet, click here or search under "Procurement."

- **Create Receipt**
  Learn how to create Receipts to record goods and services received. To view this tip sheet, click here or search under "Expenses."

- **Create Expense Report**
  Learn how to create an Expense Report for yourself or on behalf of other workers, request reimbursement for expenses, reconcile Travel Card transactions, itemize or split cost for items, and find related reports. To view this tip sheet, click here or search under "Expenses."

- **Create Spend Authorization**
  Learn how to create a Spend Authorization for yourself and/or on behalf of other workers, request a cash advance for University-related travel expenses, or how to find related reports. To view this tip sheet, click here or search under "Expenses."

- **Delegation**
  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). To view this tip sheet, click here or search under "Basics."

- **FIN-PAY-Salary Details Report**
  Learn how to view the breakdown of gross pay per employee over one or more pay periods for a pay group by Worktags in Workday. To view this tip sheet, click here or search under "Reports."

- **Salary Detail Report**
  Learn how to run reports on employees who have any portion of their salary paid by a specific combination of Cost Center and Driver Worktag in *Reports* (reports.miami.edu). To view this tip sheet, click here or search under "Reports."

- **Finance Reports in Workday**
  Learn how to run reports in Workday, and about Finance reports available by security role. To view this tip sheet, click here or search under "Reports."

- **Principal Investigator (PI) Navigation**
  Learn how to access and complete tasks including Approve/Send Back/Deny Task, or Delegate Task. To view this tip sheet, click here or search under "Basics."

- **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). To learn how to access and complete the form, and follow up on requests that have been submitted, please review this tip sheet.

  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.

- **Verify Procurement Card (PCard) Transactions**
  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/or find related reports. To view this tip sheet, click here or search under "Basics."

- **Workday Finance: UMH**
  To view tip sheets related to University of Miami Hospital (UMH), click here, or search under "UMH Specifics."

- **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 then scan and email the completed form 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 then scan and email the completed form to: help@miami.edu using your UM email account.

To learn more tips and tricks, please click here.

Help and Support

The Workday Finance Security Role Matrix is available on the Workday Finance website under Workday Finance Training. Please review this page to learn about role visibility, assignments, and implications.

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

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

Changes to Workday HCM

Faculty eRecruiting: In December, the Workday HCM team implemented the eRecruitment module in Workday to enhance faculty recruitment efforts by streamlining the hiring process, and improving the efficiency and transparency of recruitment tasks. The Workday HCM team is currently working on the configuration for Staff eRecruiting, set to launch in the summer of 2018.

Important Links

- Log in to Workday
- Finance Advisory Board
- Finance Advisory Councils
- Training Resources
- Workday Finance Frequently Asked Questions
- Communications

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

Connect

To subscribe to this message, please contact us at: workday@miami.edu using the subject line "Subscribe to Workday Finance Update."