Meet the Team

Sandra Storrod

Sandra is originally from the Virgin Islands, but currently lives in Miami, Florida. She earned a Bachelor’s degree in business administration from the University of Miami. Sandra is passionate about helping others and enjoys spending time with her family. She also enjoys going to the beach, traveling, and watching movies. Sandra is a great resource for anyone looking for advice on financial matters.

Role-Based Resources

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

• Accountant
• Department Accountant
• Financial Analyst
• Financial Manager
• Financial Officer
• Financial Planner
• Financial Secretary
• Financial Specialist
• Financial Support
• Financial Analyst
• Financial Manager
• Financial Officer
• Financial Planner
• Financial Secretary
• Financial Specialist
• Financial Support

To view tip sheets related to University of Miami (UM) financial processes, please click here or search for the keywords: “Workday Reporting.”

Grant Reports, and Award Role Assignments by

This one-hour webinar covered valuable information on grant reports and award role assignments by the University of Miami (UM). The webinar provided an overview of the financial management processes and best practices for managing grants and awards.

To register, please visit Workday Finance. Please review this tip sheet. Note: Failure to act upon the Supplier Account Match Event may result in the delay of Supplier payment.

Changes to Workday

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

Help and Support

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

Changes to Workday

The University of Miami (UM) has modified the business process to include the following changes to Workday:

1. Introduction of new roles: The University has introduced new roles to improve financial management processes.
2. Increased transparency: The new roles provide greater transparency in the financial management process.

To learn how to access and complete the Workday Request Form - Initiator & Reviewer Roles, please view this tutorial. To view this tip sheet, please click here.

The Workday Sponsors recently announced the following changes to Workday:

1. Introduction of new roles: The University has introduced new roles to improve financial management processes.
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TIPS AND TRICKS

Understanding Workday Reporting Webinar Series

Workday Reporting Webinar Series is a series of webinars that provide valuable information on Workday reporting.

• How to access Workday Reporting Webinar Series
• How to view Workday Reporting Webinar Series

Workday Match Exceptions

Match Exception (variance) exists between a Supplier and an Account Match Event task in Workday when a Supplier is not matched to an Account.

• CCs and CCSPMs to take one of the following actions:
  1) Initiate a Match Exception Override which requests the Supplier to take action.
  2) Request a Match Exception Override which requests the Supplier to take action.

To view tip sheets related to University of Miami (UM) financial processes, please click here or search under “Procurement.”

Locate Payment Details for a PO

To locate payment details for a Purchase Order (PO), please follow these steps:

1. Log in to Workday.
2. Click on the “Supplier” tab.
3. Click on the “PO” tab.
4. Click on the “Details” tab.
5. The payment details will be displayed.

To view this tip sheet, please click here.

Creating Expense Reports

Learn how to create an Expense Report, for Reimbursements and Reimbursement Requests.

To view this tip sheet, please click here.

Creating Receipts

Learn how to create Receipts to record goods or services purchased.

To view this tip sheet, please click here.

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Workday Communications

To view workday communications, please click here.