



Congratulations!

[Workday Finance](#) went live on September 1. This project enabled the University to improve the delivery of Finance services, and provides our faculty, staff, and students with the tools they need to be successful at UM.

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 continue to provide valuable feedback post go-live.

As of Wednesday, September 27, the UMIT Service Desk has processed more than 1,100 tickets, and have assisted 543 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.

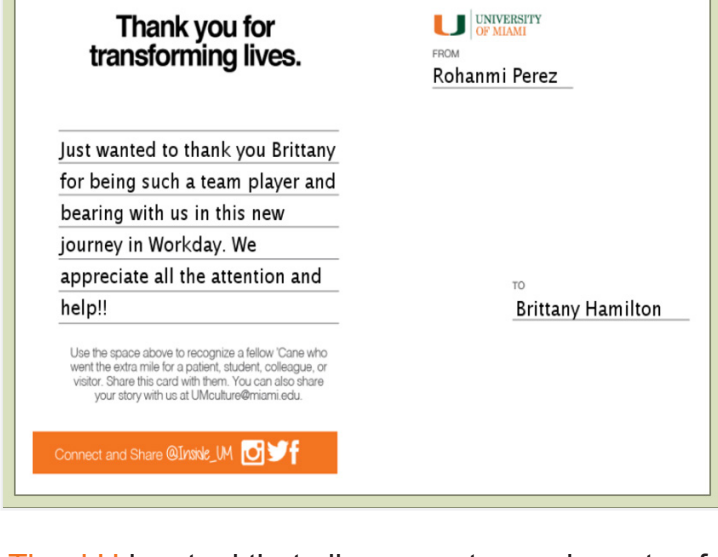
- Theresa Ashman



Who's behind help@miami.edu?

The UMIT Service Desk is staffed by Service Desk technicians who respond to help@miami.edu and assist with Workday issues 24 hours a day, 7 days a week. Service Desk Technicians support users and if necessary, assign tickets to Workday Finance team members.

The UMIT Service Desk continues to provide great customer service and is a great partner to many other areas, especially the Workday team! Here's an example of a ThankU from Rohanmi Perez, a Nursing Manager, to Brittany Hamilton, a Service Desk technician.



[ThankU](#) is a tool that allows you to send a note of gratitude to any UM employee. Click here to show your appreciation by sending someone a ThankU about your Workday experience.



What happens to Intedepartmental Requisitions (IDR's)?

- IDR's are handled two ways in Workday: through Internal Service Providers (ISP) and through accounting journals.
- A list of approximately 70 ISP's were identified for September 1 and those areas are continuing to be trained on the new functionality. For areas that are not an initial ISP, but who charge other areas for goods or services, please discuss with your Cost Center Manager to assign the role of Accountant to the people who perform this task and advise them to take the Accounting Journals training. To register, log in to [ULearn](#) and search using the following keyword: "Journals."



Meet the Team

Each month, the Workday Finance Team would like to introduce you to two different members of the team. This month, meet Maria Molina and Ekanth Malladi.

Maria Molina is the ERP Functional Lead for Workday Finance Project Team. She leads post-production support for the University Community as related to business processes currently in production such as Payroll accounting adjustments, costing allocations, and organization assignments. Maria is originally from Leon, Nicaragua and moved to Miami, FL when she was 15. She earned her Bachelor's degree in Business Administration from Florida International University and continued her education at the University of Miami, earning graduate certificates in Accounting and Business. When Maria is not at work, she enjoys spending time with her two teenage sons and the rest of her family. She especially enjoys time with her 6-year-old niece – the only girl of the family. Maria's favorite time in history is the 80s. She loves the movies, the fashion, and, most of all, the music. Maria loves trying out new dishes and reading Spanish literature. The last book she read was, "Cien años de soledad (One Hundred Years of Solitude) by Gabriel Garcia Marquez. She's read it multiple times and recommends it to anyone that enjoys embracing their imagination.

Ekanth Malladi is a Deloitte Integration Consultant for the Workday Finance Project. He designs and builds integrations between Workday and other legacy system and vice versa. His focus includes Accounting, Ad Hoc Bank Transactions, Expenses, Payments, Procurement, and Reporting in Workday. Ekanth's responsibilities also include Financial Tenant Build and serving as a technical liaison between the UM Functional Team and Legacy System. Ekanth commutes every week from Tampa, FL, but was raised in Hyderabad, India. He lived in India for 23 years until deciding to further his career in the States. Ekanth earned his Bachelor's Degree in Electrical Engineering and Electronics from Pondicherry University in Pondicherry, India. When he's not at work, Ekanth enjoys spending time with his family at the beach, cooking, watching cricket, and going on road trips. Most recently, he went on a road trip to Oregon and Washington. Ekanth enjoys pop and jazz music and his favorite genre of movie is horror/thriller. Ekanth's literature of choice is Indian Mythology.

Important Links

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



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 October. 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 gets triaged effectively.



Workday Finance Tips

- Correct Company Selected on a Purchase Requisition**
Purchase Requisitions must be submitted using driver worktags that are consistent with the Company you are using. To learn how to correct the Company selected on a Purchase Requisition, please view 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.
- Costing Allocations**
All add job business processes, new hire and transfers are routing to Cost Center Managers (CCMs) for a costing allocation in Workday. Although the business process allows CCMs to complete the costing allocation without a Driver Worktag entry, this field is mandatory to successfully submit the costing allocation. For information on how to Assign Costing Allocation in Workday, please view this [tip sheet](#).

Failure to complete the costing allocation without a Driver Worktag entry may result in:

- Charges not appearing for the respective program, grant, etc.
- The Composite Fringe Benefit (CFB) being incorrectly calculated or charged
- If the employee is being terminated, transferred, or if there is a retro payment involved, the payroll process will be in error and will not allow the entire payroll to proceed

- Finance Reports in Workday**
To learn how to run reports in Workday and about Finance reports available by security role, please view 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** 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** in Workday. Please complete the form and scan and email to help@miami.edu using your UM email account.



Impact for UHealth

UHealth, including the University of Miami Hospitals and Clinics (UMHC), Ann Bates Leach Eye Hospital (ABLEH), University of Miami Hospital (UMH), and the University of Miami Medical Group (UMMG), will be impacted by the Workday Finance implementation as follows:

September 1:

- UMHC and ABLEH will use Workday for capital and non-clinical purchases, expense reimbursements, and P-Card reconciliation. McKesson will continue to be used for clinical purchases and Lawson will be used for general ledger.
- UMMG will use McKesson for clinical purchases and will use Workday for all other in-scope functionality.
- DOLFIN will continue to be available and will be populated with Workday FDM data beginning September 1. The new dynamic business intelligence (BI) portal, [Reports](#), also includes UHealth financial data.
- UMH will use Workday for the same purchases UMH personnel currently use Ariba/UMeNet today.

October 29:

UMH will be impacted as follows:

- 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



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 October.

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.

