

The new Workday Update combines Human Resources and Finance Workday news, which will be distributed on a monthly basis.



## The Word on Workday

In this post-launch phase, the Workday project team has now transitioned into a combined Workday support team under the name Enterprise Business Solutions (EBS). This team brings together Human Resources and Finance functional experts to optimize system capabilities and performance.

In an effort to better prioritize, consolidate, and understand system issues, Workday Roundtables and stakeholder alignment meetings were held in June with faculty, staff, finance business officers, and central office leadership from the Coral Gables, Medical, and Rosenstiel School of Marine and Atmospheric Science (RSMAS) campuses. Participants presented a list of issues to discuss during these meetings, which resulted in a prioritized action list for the EBS team. The following items have been resolved or queued for further development:

### Reports

- Created and updated reports to assist in the year-end closing process. For more information, please read the Workday Tips and Tricks section.
- Created new [Workday Finance Reporting Tip Sheets and Tutorials](#).

### Website

- Updated [Role-Based Resources](#) under the Workday Finance Training Role Matrix website.
- Added a [Business Process Approval Workflows](#) document under the Workday Finance Resources tab. Review this document to learn who can initiate, approve, and review a number of business processes, e.g. Create Journal, Create Expense Report, and Create Purchase Requisition.

### In Development

- Click [here](#) to learn about completed and in development system changes.

A special thank you to those involved in Workday Roundtables. The EBS team is working closely with central offices and departments to identify additional training and configuration changes, as necessary.



## System Changes

Click [here](#) for a comprehensive list of completed and in-development system changes.



## June: Workday Ask the Experts Materials

This one-hour webinar provided an overview of [Reports](#), the University of Miami's dynamic Business Intelligence (BI) portal and covered the following topics:

- Accessing Reports
- Security
- Available Reports
- Future Developments

The webinar is now available as a Computer-Based Learning (CBL) module. To view the CBL, visit [ULearn](#) and search for the keywords: "Ask the Expert" or by the complete course name: "Workday Finance Ask the Experts Session."



## Updated Role-Based Resources

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

- [Accountant](#)
- [Cost Center Manager](#) \*New
- [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](#).

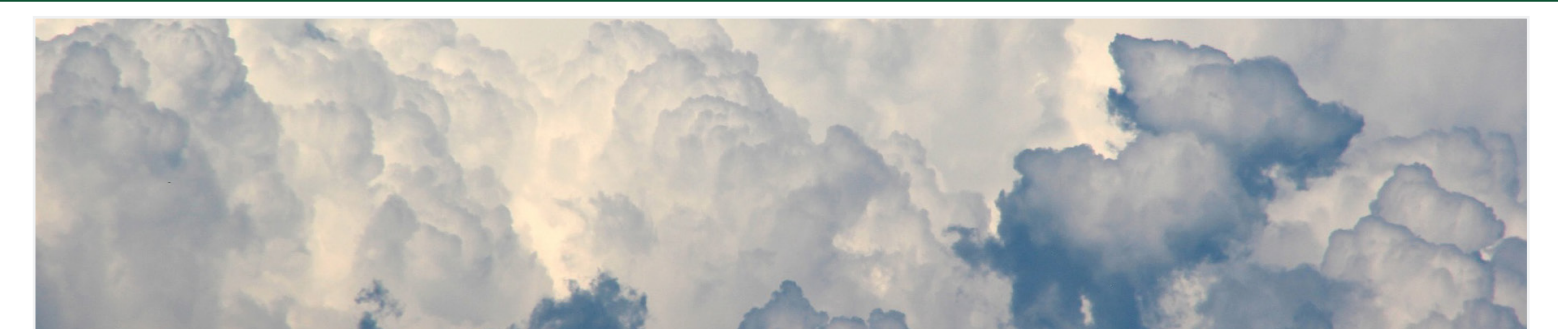


## Workday Tips and Tricks

Click [here](#) to access Workday Tip Sheets and Tutorials or search the name of the tip sheet in the specified category.

- **Assign Costing Allocation**  
Learn how to initiate this business process, add an Allocation, and more. Costing Allocations (Salary Distribution) allocates a worker's salary across one or more Driver Worktags. To view this tip sheet, click [here](#) or search under "Payroll Accounting."
- **Complete Manager Evaluation**  
Learn how to complete the performance review form, acknowledge that you have completed the TALK discussion with your employee, and print your employee's final performance review. To view this tip sheet, click [here](#) or search under "Performance Review."
- **Locate Payment Details for a PO**  
Learn how to verify that invoices have been paid against a Purchase Order (PO) and locate details about the payment, including the check number, check date, and payment amount. To view this tip sheet, click [here](#) or search under "Procurement."
- **Match Exception**  
Learn how to review a Match Exception from your Workday Inbox and either correct the Match Exception or request a Match Exception Override. To view this tip sheet, click [here](#) or search under "Procurement."
- **POs with Open Encumbrances by Organization**  
Learn how to identify Purchase Orders (POs) that have remaining/open balances by one or more Cost Centers, Cost Center Hierarchies, or Driver Worktags. To view this tip sheet, click [here](#) or search under "Reports."
- **Workday Finance Reports Matrix – Updated**  
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 "Reporting."
- **Workday Finance: UMH**  
To view tip sheets related to University of Miami Hospital (UMH), click [here](#), or search under "UMH Specifics."
- **Workday Forms**  
Review [Workday Forms](#) to request supervisory organizations, roles, and reports in Workday.

To learn more tips and tricks, please click [here](#).



## Don't Stay in The Clouds, Get Workday Support!

There are a variety of immediate Workday support options to get you the support you need!



Review [Workday Tip Sheets and Tutorials](#) for assistance in completing a business process or running a report.



Get real-time assistance with Workday issues 24 hours a day, 7 days a week. Please contact the UMIT Service Desk at: (305) 284-6565.



Submit a question and receive a response by email. Please contact the UMIT Service Desk at: [help@miami.edu](mailto:help@miami.edu).

### Additional Workday Support



Get one-on-one assistance in completing a business process or running a report from a Workday expert. For the full schedule, please click [here](#). (Note: you do not have to register to attend a Drop-In Lab.)



Register for Workday instructor-led training (ILT) courses. Visit the [Workday Finance Training Catalog](#) to review a list of available ILT training.



Register for Workday webinar sessions, and computer-based learning (CBLs). Visit the [Workday Finance Training Catalog](#) to review a list of available webinars this month.

If you are experiencing difficulties completing a business process or running reports due to system performance, please email screenshots and details of the specific business process to [workday@miami.edu](mailto:workday@miami.edu).

## Important Links

- [Log in to Workday](#)
- [Training Resources](#)
- [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](mailto:help@miami.edu).

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