

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



## The Word on Workday

The Enterprise Business Solutions (EBS) Team, in collaboration with central offices (Human Resources, Accounts Payable, Controller's, Financial Planning & Analysis (FP&A), Medical Finance, and the Office of Research Administration (ORA)), have continued to work on system stabilization efforts through a variety of Workday support option:

- Coral Gables, Medical, and Rosenstiel School of Marine and Atmospheric Science (RSMAS Roundtables
- Ask the Expert Webinars
- [Workday Drop-In Labs](#)

Though change is never easy, we'd like to extend a special thank you to those involved in stabilization efforts.

- ☀ Click [here](#) to give your suggestions on how the EBS team, central offices, and departments can improve their outreach efforts.

In an effort to better prioritize, consolidate, and understand system issues, Workday Roundtables and stakeholder alignment meetings were held in July 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:

### Tip Sheets and Tutorials

- The [Create Expense Report](#) has been updated to provide specific instructions when reconciling Expense Report Lines pertaining to Travel Card Transactions. Note: Per [University Policy](#), personal expenses should not be incurred on a University Travel Card.
- Human Resources [Workday Tip Sheets and Tutorials](#) were created and updated.

### Website

- [Role-Based Resources](#) under the Workday Finance Training Role Matrix website were updated.

### In Development

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

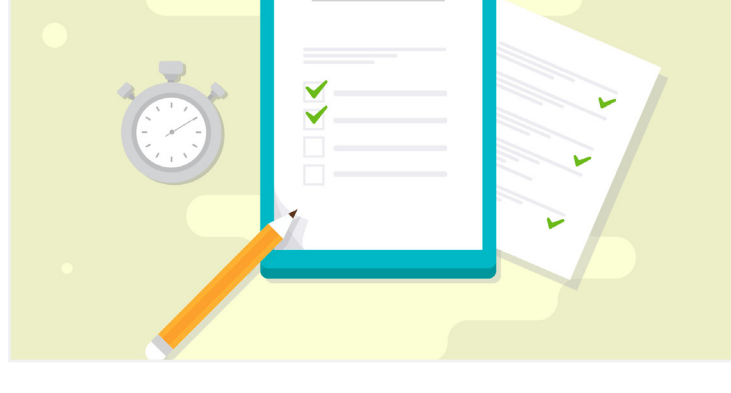
The EBS team is working closely with central offices and departments to identify additional training and configuration changes, as necessary.



## A New and Improved Hiring System is Coming Soon to the U

The University of Miami will be implementing a new recruitment system for staff before the end of this year. Workday Recruiting is an online recruitment system built to streamline the recruitment and hiring process that will reduce hiring time, improve efficiency, consistency, and process tracking at the U. For reference, please see the announcement [here](#).

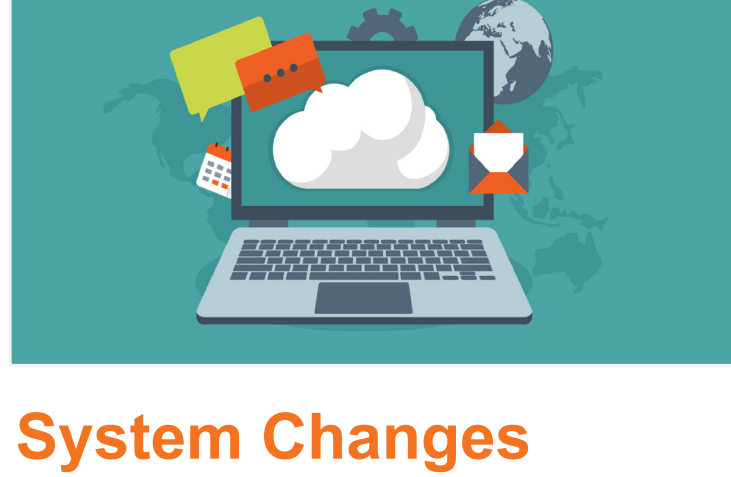
You can preview the system by visiting the [Careers at UM](#) website and clicking on "Faculty Positions."



## Now Available: Supplier Onboarding Process Webinar

This one-hour session will provide a basic understanding of the supplier onboarding process. To register, please log in to [ULearn](#) and search for the keywords: "Supply Chain –Supplier Onboarding Webinar."

Please note classes are available through the end of August. For questions pertaining to Supplier Onboarding training, please contact Heidi Tyre, IT Training Manager, at [htyre@miami.edu](mailto:htyre@miami.edu).



## System Changes

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



## New Workday Website Coming Soon!

Something great is in the works! A new unified Workday website will be launched in September 2018. Stay tuned for the latest information on Workday HR- and Finance-related updates.



## July: Workday Ask the Experts Materials

This one-hour webinar provided an overview of P-Card/Travel Cards and covered the following topics:

- P-Card/Travel Card Policy
- Travel Card Reconciliation
- PCard Reconciliation

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 Ask the Experts Session."



## 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](#)
- [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.

- **Change Job: New Position, Same Manager**  
Learn how to move an employee from their current position into a different position within the same supervisory organization. To view this tip sheet, click [here](#) or search under "Human Resources."
- **Designating Essential Personnel**  
Learn how to designate an essential worker. A "Designated Essential Worker" is an employee who will work before, during, and/or after an emergency or natural disaster. To view this tip sheet, click [here](#) or search under "Human Resources."
- **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."
- **Manage Education**  
Learn how to view/add/edit/remove education. To view this tip sheet, click [here](#) or search under "Personal Information."
- **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."
- **Search**  
To learn about Workday's search bar, which is visible and available on every page, click [here](#) or search under "Basics." Note: While viewing search results in Workday, you can limit search results by clicking on a search category on the left, e.g. Organizations, People, etc., or use the All of Workday search category to search everywhere within Workday.
- **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](#).

## 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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