**Workday Tips and Tricks**

**Important Links**

To order an item and have it delivered to someone else, please review the steps below:

1. Respective Ship-To Addresses:
   - In the drop-down menu, go to the Shipping Address tab and update the Default Ship-To Address field to the employee's name.
   - To remove UM Accounts Payable as the default Ship-To address, and select a valid Ship-To address from the drop-down menu.

**Workday Instructor-Led Training (ILT)**

- Electronic Workload & Accounting for Accounts Payable
- UM Quicklinks Worklet
- UM Quicklinks Worklet FAQs
- UM Quicklinks Worklet What’s New
- UM Quicklinks Worklet Financial Reporting
- UM Quicklinks Worklet Project Management
- UM Quicklinks Worklet Requests for Payment Management

**Workday Microworking:**

- Hiring and Recruiting
- Financial Controls
- Financial Reporting
- Projects & Grants
- Talent Management

**Frequently Asked Questions**

- Workday issues 24 hours a day, seven days a week. If you have a question or need immediate support, please contact workday@miami.edu or call 305-284-HELP (4357).

**System Changes**

- Financial Reporting has been completed and enhancements are in progress.
- Workday 32 was released on March 9, 2019. The EBS team reviewed custom integrations and met with financial leaders to discuss specific business needs.

**Don’t Stay In The Clouds, Get Workday Support**

- To find the latest news and access support options, visit https://workday.miami.edu.
- Do you need help with a recurring issue or a yearly process? Consider attending an upcoming KPI webinar for tips and tricks.

**New Available: Summary Balances by Workflow Reports Update**

- To learn how to move, decline, or bundle resumes for multiple candidates, please review the Manage Staff Candidate Pool tip sheet.
- Staff Managers, Recruiters, and Primary Recruiters can now select multiple candidates from the candidate grid, and view or print resumes and cover letters in bulk using the Bundle Resumes feature.

**Role-Based Resources**

- Faculty and Staff should look for updates and training opportunities in their respective roles.
- Human Resource Analysts should check the UM Workday HR Tip Sheet.
- ISP Analysts should check the UM Workday ISP Tip Sheet.
- ISP Manager should check the UM Workday ISP Manager Tip Sheet.
- ISP Accountants should check the UM Workday ISP Accountant Tip Sheet.
- ISP HR Partners should check the UM Workday ISP HR Partner Tip Sheet.
- HR Partners should check the UM Workday HR Partner Tip Sheet.
- Grants Administrators should check the UM Workday Grants Tip Sheet.
- Grants Focus Group webinars were conducted in February, specifically for Principal Investigators (PIs) and Sponsored Program Managers (CCSPM).
- 2 p.m. specifically for UHealth roundtable members, Cost Center Managers (CCM), and Cost Center Administrators.

**Security Role Request Forms**

- Grant Administrators. Results will be shared in upcoming communications.
- Security Role Request Forms.

**Analytical Capability**

- Work on the Talent Management module – a new module that supports talent landscape, alignment of top performers, and performance indicators related to assist leaders in monitoring and supporting their talent and operational needs.

**Optimization**

- As previously mentioned, the Workday Team is continuing to optimize the overall system and related processes.

**Community Engagement**

- The UM Quicklinks Worklet was updated to improve navigation of a variety of financial and system performance changes.
- The UM Quicklinks Worklet Financial Reporting and Project Management were updated to May 1, 2019.
- The UM Quicklinks Worklet Project Management includes a feature to get you the support you need.

**Workday Tip Sheets**

- Tip sheets, reports, and training options, have been updated and are available for the following roles:
  - Faculty
  - Staff
  - ISP Analyst
  - ISP Manager
  - ISP Accountant
  - ISP HR Partner
  - Grants Administrator
  - Grants Manager
  - Grants HR Partner

**Workday Webinars & Computer-Based Learning (CBLs)**

- Register for Workday instructor-led training or visit our new career site (workday.miami.edu) to review a list of available ILT and details of the specific business process to learn more.

**Learn more:**

- Running a report from a Workday dashboard.
- Submitting a question and receiving a response by email. Please contact workday@miami.edu.
- Review Workday Tip Sheets, reports, and training options.

**Get real-time assistance with Workday issues**

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