You have been assigned the role of Cost Center Sponsored Program Manager (CCSPM) by your Cost Center Manager (CCM).* This message contains information specific to your role.

**BUSINESS PROCESSES YOU CAN APPROVE:**
- Create Change Order
- Create Expense Report
- Create Internal Service Delivery (ISD)
- Create Journal
- Create Payroll Accounting Adjustments
- Create Purchase Requisition
- Create Spend Authorization
- Create Supplier Invoice
- Verify Procurement Card (PCard) Transactions

**REQUEST SECURITY ROLE ACCESS**
To request a change in security role access in Workday, visit the Forms tab on the Workday website to download and complete the appropriate Security Roles Form(s).

*To identify your CCM, please view the Security Roles tip sheet.
If you have any questions, please contact the UMIT Service Desk: (305) 284-6565 or help@miami.edu

**REPORTS**
To find the following reports in Workday, type the name in the search field:
- FIN-ACC-Balance Forward/Balance Available by Worktag
- FIN-ACC-Balances by Worktag (Management)
- FIN-ACC-Enhanced Journal Line Detail
- FIN-ACC-Fund Account Summary by Organization
- FIN-ACC-Summary Balances by Program
- FIN-ACC-Transaction Audit P&L by Organization (Management Budget)
- FIN-ACC-Trial Balance by Worktag
- Find Ad Hoc Payment Lines by Organization
- FIN-FPA-Management Income Statement – FP&A by Organization
- FIN-GRA-Transaction Audit (Department)
- FIN-GRA-Clinical Trials Monitoring (Department)
- FIN-GRA-Enhanced Journal Line Detail by Award (Department)
- FIN-GRA-Find My Awards
- FIN-GRA-Find My Grants
- FIN-GRA-Find My Sub-Awards
- FIN-GRA-Grants Transaction Audit (Department)
- FIN-P2P-Find Expense Report Lines & Payment for Organization
- FIN-P2P-Match Exception with Reasons by Organization
- FIN-P2P-POs with Open Encumbrances by Organization
- FIN-P2P-Supplier Contract Lines by Organization
- FIN-P2P-Supplier Invoice Lines by Organization
- FIN-PAY-Expanding Costing Allocations
- FIN-PAY-Payroll Obligations
- FIN-PAY-Salary Detail
- FIN-PAY-Salary Detail by Award + CFB
- HCM-ADM-Active Employees
- My Awards Portfolio Dashboard

**TIP SHEETS & SMART WALK-THRU'S**
The following tip sheets and Walk-Thrus can be accessed within Workday by clicking the orange Need Help? icon.

**Tip Sheets:**
- Approvals
- Business Process Notification Preferences
- CCM Tasks – Verifying the Correct CCM
- Financial Data Model (FDM)
- My Awards Portfolio Dashboard
- Summary Balances by Worktag Dashboard
- Supplier Invoice Lines by Organization
- Workday Finance Reports Matrix

**Smart Walk-Thrus:**
- Assign Costing Allocation
- Assign Costing Allocation Tasks
- Close Purchase Order
- Create Internal Service Delivery (ISD)
- Create Journal
- Create Payroll Accounting Adjustment
- Create Requisition – Catalog Goods/Punch Out
- Create Requisition – Non-Catalog Items
- Create Supplier Invoice
- Create Supplier Request
- Creating an Expense Report
- Creating a Spend Authorization
- Delegate Inbox Items / Business Processes
- Delegate Task & Stop Delegation
- Grants: Create Payroll Accounting Adjustment
- Initiate a Change Order
- Locate Payment Details for a PO
- Match Exceptions
- Non-Employee and Student Reimbursement Form
- Reassign Travel Card Expense

**RESOURCES**
- Business Process Approval Workflows
- Data Audit - Cost Center - Company Crosswalk
- Frequently Asked Questions (FAQs)
- Tip Sheets & Interactive Guides
- Workday Updates

*Last Updated: August 2022*