Workday Procurement Data Entry Specialist Role

You have been assigned the role of **Procurement Data Entry Specialist** by your Cost Center Manager (CCM).* This message contains information specific to your role.

Business processes you can initiate:

- Close Purchase Order
- Create Change Order
- Create Supplier Invoice
- Create Supplier Request
- Verify Procurement Card (PCard) Transactions

Training

To register for Workday training, click on the course links below:

- **Workday: FDM** - ***CBL***
- **Workday: Procurement** - ***ILT***
- **Workday: Check Requests** - ***Curriculum***
- **Workday: Reporting For Data Entry Specialists** - ***CBL***

Reports

To find the following reports in Workday, type the name in the search field:

- Find Procurement Card Transaction Verifications
- Find Purchase Order Line and Line Splits for Organization
- Find Purchase Orders
- Find Requisition Line and Line Splits for Organization
- Find Suppliers
- Match Exception with Reasons (*FIN-P2P-Match Exception with Reasons by Organization*)
- My Requisitions
- POs with Open Encumbrances by Organization (*FIN-P2P-POs with Open Encumbrances by Organization*)
- Supplier Invoice Lines by Organization (*FIN-P2P-Supplier Invoice Lines by Organization*)

Tip Sheets:

- **Close Purchase Order**
- **Correct Company Selected on a PCard Verification**
- **Find Purchase Order Line and Line Splits for Organization**
- **Locate Payment Details for a PO**
- **PO's With Open Encumbrances by Organization**
- **Supplier Invoice Lines by Organization**
- **Workday Finance Reports Matrix**

Smart Walk-Thrus:

- Create Requisition – Catalog Goods/Punch Out
- Create Requisition – Non-Catalog Items
- Create Supplier Invoice
- Create Supplier Request
- Initiate a Change Order
- Match Exceptions
- Verify Procurement Card (PCard) Transactions

Support Resources:

Business Process Approval Workflows
Frequently Asked Questions (FAQs)
FRS/FDM Conversion Tool
Interactive Guides
Reports in Workday
Tip Sheets and Tutorials

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**.

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Transform your workday