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.

Last Updated: April 2021