

The Word on Workday

As previously mentioned, the Workday Team is continuing to optimize the overall system and related processes. Review updates to the following four strategic priorities for the Enterprise Business Solutions (EBS) team and central office staff to focus on through Fiscal Year 2020, as detailed below:

Optimization



- Workday 32 was released on March 9, 2019. The EBS team reviewed custom integrations and met with central offices to review processes and activities. [Click here for more information about the new Workday features and functionalities.](#)
- An assessment of the current challenges with the Finance Module with an emphasis on Grants, Assets and Financial Reporting has been completed and enhancements are in progress.
- The TALK FY19 Final performance reviews was launched. The review will be available March 1, 2019 to May 1, 2019. [Click here for a comprehensive list of completed and in-development system changes.](#)
- The UMS Quicklinks Worklet was updated to improve navigation of a variety of Security Role Request Forms.



Community Engagement



- UHealth Workday Roundtables have transitioned to virtual meetings moving forward. Communications have been distributed for the upcoming UHealth Virtual Roundtable scheduled on Thursday, April 11 at 2 p.m. specifically for UHealth roundtable members, Cost Center Managers (CCM), and Cost Center Sponsored Program Managers (CCSPM). The Superuser Certification program design is currently being finalized. This comprehensive program, launching in early May, will provide advanced training and department-level support for designated users on two role-based tracks – Expense Data Entry Specialist (EDES) and Procurement Data Entry Level Specialist (PDES).
- Grants Focus Group webinars were conducted in February, specifically for Principal Investigators (PIs) and Grant Administrators. Results will be shared in upcoming communications.

Strategic Plan Support



- Work on the Talent Management module – a new module that supports talent landscape, alignment of top talent with key business objectives, and development of tomorrow's leaders – started and will launch at the end of 2019

Analytical Capability



- Work was started on the Human Resource and Finance Dashboards to provide data visualization of key performance indicators related to assist leaders in monitoring and supporting their talent and operational needs.
- An analysis of user behavior in system usage was started. This initiative will improve operational efficiency of processes.

Workday Microlearning:

Bundle Resumes

On March 9, new Workday features and functionalities became available. As part of this update, faculty and 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 (screengrab below for reference).

To learn how to move, decline, or bundle resumes for multiple candidates, please review the [Manage Staff Candidate Pool tip sheet](#).

Learn more:

Training is available for Managers and Primary Recruiters. To register, log in to [ULearn](#) and search using the complete course name "Staff Workday Recruiting for Managers and Primary Recruiters."

For information on applying for a job, managing a candidate, and assigning roles, please review [Workday HR: Recruiting tip sheets](#), or visit our new career site ([miami.edu/careers](#)).

If you have questions related to hiring or applying, please contact your Recruiter or [HR Partner](#). For questions related to training, please contact the Workday team at: workday@miami.edu.

Workday Tips and Tricks

Don't stay in the clouds! Learn these Workday Tips and Tricks to complete your business processes or [click here to access Workday Tip Sheets and Tutorials](#).

Purchase Requisitions

- With the release of Workday version 32, you can define a Ship-To location with an associated Deliver-To at the header level. This will be useful for orders that need to be shipped from the supplier to a receiving dock or Information Technology (e.g., if a Procurement Data Entry Specialist needs to order a new computer for the Department Chair, the Ship-To will be Information Technology and the Deliver-To will be the Chair's workspace).

Difference Between Fields

Default Ship-To

If the goods/services will be shipped straight to a desktop location, the information in both the Ship-To and Deliver-To fields will be repeated with the Receiver or requisition's workspace information (the receiving dock or Information Technology).

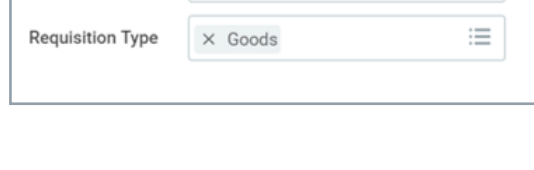
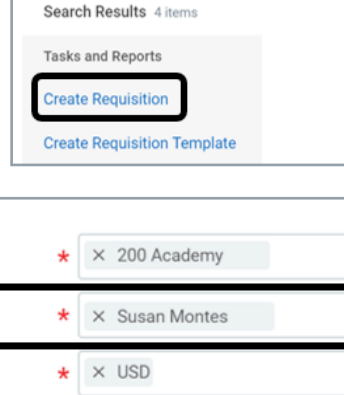
Default Deliver-To

The Receiver or requisition's workspace as designated by the supervisor in Workday.*

- *Note: If your current work space doesn't match the Deliver-To, please contact your supervisor or HR Partner to update this information Workday. To learn how to edit an employee's work space to reflect the floor and/or room/cubicle for their work address, [please refer to this tip sheet](#). Once the employee's work space is updated, all future purchase requisitions created will have the updated location. Previous requisitions will not automatically update.

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

- In the Workday search box, type **create req** and click on the magnifying glass icon.
- If no results appear, click **All of Workday** located in the left-hand column, at the bottom.
- Click **Create Requisition**.
- Find the Requester field and populate with the employee's name that will have desktop delivery. Complete all fields and click **OK**.



Scenario 1 - Ordering office supplies and prefer the delivery to come to a particular desktop, and individual will distribute to the department.

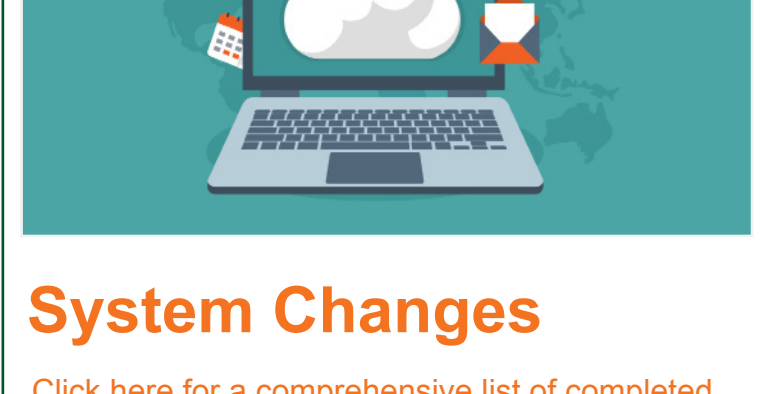
Scenario 2 - Ordering a computer on behalf of another employee and you need the delivery to go to their desktop. Note: The Requestor is the other employee's name.

To remove UM Accounts Payable as the default Ship-To address, and select a valid Ship-To address from the drop-down menu, go to the Shipping Address tab and update the Default Ship-To Address field to the receiving dock or Information Technology. If you prefer to have the goods/services shipped straight to a desktop location, the information in both the Ship-To and Deliver-To fields will be repeated with the Receiver or requisition initiator's workspace information.

Respective Ship-To Addresses:

- For UM Academy-funded – Coral Gables/Medical campuses:**
1365 Memorial Dr., Ungar 136, Coral Gables, FL 33146-2508 USA
- For UM Academy-funded – RSMAS campus:**
4600 Rickenbacker Cswy., Marine Tech LSSR G48, Miami, FL 33149-1031 USA
(or search "4600 G48" in Workday.)
- For UHealth IT Related Products:**
1051 NW 14th St., Floor 01, Room 140, Miami, FL 33136-2111 USA

For technical support, please contact the UMIT Service Desk at (305) 284-6565 or help@miami.edu.



System Changes

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



Don't Stay in The Clouds, Get Workday Support!

There are a variety of immediate Workday support options to get you the support you need!

Workday Tip Sheets and Tutorials

- Review [Workday Tip Sheets and Tutorials](#) for assistance in completing a business process or running a report.

Call
Get real-time assistance with Workday issues 24 hours a day, 7 days a week. Please contact the UMIT Service Desk at: (305) 284-6565.

Email
Submit a question and receive a response by email. Please contact the UMIT Service Desk at: help@miami.edu.

If you are experiencing difficulties completing a business process or running reports due to system performance, please email screenshots and details of the specific business process to workday@miami.edu.

Additional Workday Support

Request a Workday Drop-In Lab

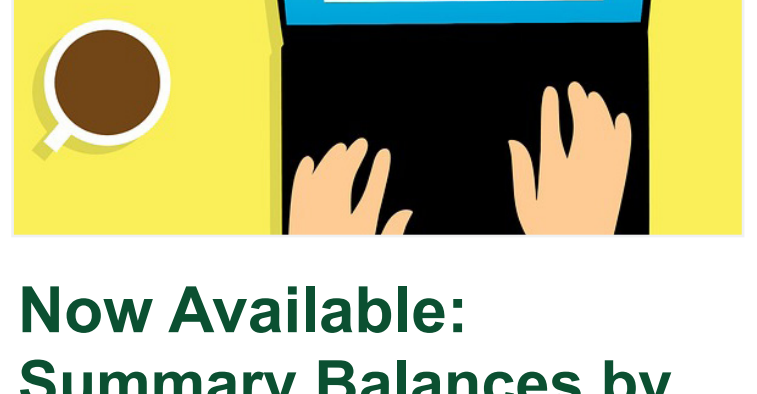
Get one-on-one assistance in completing a business process or running a report from a Workday expert. To learn more about requesting a Drop-In Lab in your area click [here](#), or email workday@miami.edu.

Workday Instructor-Led Training (ILT)

Register for Workday instructor-led training (ILT) courses. Visit the [Workday Finance Training Catalog](#) to review a list of available ILT training.

Workday Webinars & Computer-Based Learning (CBLs)

Register for Workday webinar sessions, and computer-based learning (CBLs). Visit the [Workday Finance Training Catalog](#) to review a list of available webinars this month.



Now Available: Summary Balances by Worktag Reports Update

As of March 20, new versions of the Summary Balances by Program, and Summary Balances by Gift reports are available to be run in [Workday](#).

What's New?

- The **Balance Forward** and **Balance Forward Balance** columns have been added in both reports to provide visibility of Driver Worktags with Balance Forward totals (sample below for reference).

These reports are used to get a quick day-to-day view of reports/analyze selected Programs and Gifts. Funds with Balance Forward totals include:

- Fund 20 – Unrestricted Designated Funds
- Fund 21 – Dependent Reserve Funds
- Fund 35 – Agency Funds
- Fund 50 – Temporary Restricted Funds

Dashboard Available

To learn how to add the Summary Balances by Worktag Dashboard, and/or a worklet on your Workday homepage to get a quick view of balances for all your Program, Project, and Gift Driver Worktags, please review this [tip sheet](#).

To learn how to run additional reports in Workday, and about Finance reports available by security role, please review this [tip sheet](#).



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](#).

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.

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