

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:

- Create Change Order
- Create Supplier Request/Invoice (formerly eChecks)
- Verify Procurement Card (PCard) Transactions

UMH Specific:

- Create Purchase Requisition

Tip Sheets:

- [Close Purchase Order](#)
- [Create Change Order](#)
- [Create Supplier Request/Invoice for Check Requests](#)
- [Create Supplier Invoice for ACH Payment and Wire Transfer Requests](#)
- [Locate Payment Details for a PO](#)
- [Correct Company Selected on a PCard Verification](#)
- [Verify Procurement Card \(PCard\) Transactions](#)
- [Create Change Order \(UMH\)](#)
- [Create Purchase Requisition for Catalog Goods \(UMH\)](#)
- [Create Purchase Requisition for Non-Catalog Goods \(UMH\)](#)
- [Create Purchase Requisition for Services \(UMH\)](#)

Reports

To find the following [Reports in Workday](#), search the name in the search bar:

- “Find Requisition Line and Line Splits for Organization”
- “Find Procurement Card Transaction Verifications”
- “Find Purchase Order Line and Line Splits for Organization”
- “Find Supplier”
- “Match Exception with Reasons”
- “POs with Open Encumbrances”
- “Supplier Invoice Lines by Organization”

Training:

To register for Workday’s curriculum (mixed – both instructor-led training (ILT) and computer-based (CBL) courses available), log into [ULearn](#) and search by the complete course name:

- Workday Financial Data Model (FDM) 101 CBL
- Workday: Procurement
- Workday: Check Requests (Formerly eChecks)
- Workday Foundational Concepts CBL



Request Security Role Access

To request a change in security role access in Workday, visit the [“Forms”](#) tab on the Workday Finance website to download and complete the appropriate Security Roles Form(s).



Support Materials:

- [Frequently Asked Questions \(FAQs\)](#)
- [FRS/FDM Conversion Tool](#)
- [Business Process Approval Workflows](#)
- [Tip Sheets and Tutorials](#)
- [Finance Reports in Workday](#)
- [Workday Finance Glossary](#)

*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.