

Workday FAQs

<http://workday.miami.edu>

Need Training?

Check out the [Drop-In Labs](#) for on the spot assistance and [ULearn](#) for formal classroom training

Conversion Tools

[Conversion Tools](#) (not Internet Explorer friendly)

FRS to FDM <ul style="list-style-type: none"> FRS Account Number and Description FRS Department Number and Description FRS Sub-Department Number and Description 	FDM to FRS <ul style="list-style-type: none"> Workday FDM Driver Worktag ID and Description Workday Cost Center ID and Description
FRS Sub-Object to FDM <ul style="list-style-type: none"> FRS Sub Object Code and Description 	FDM to FRS Sub-Object <ul style="list-style-type: none"> Workday Spend Category ID and Description

Terminology

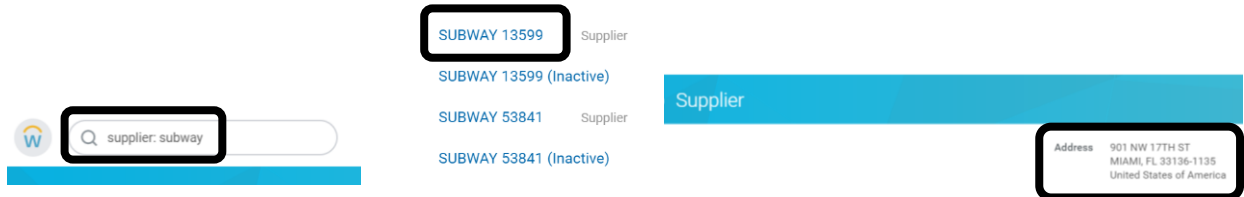
- **Spend Category** formerly known as “Sub Object Codes.”
- **Cost Center Manager** - Who is my cost center manager? To find the name of your cost center manager view this tutorial.
https://my.it.miami.edu/wda/erpsec/tipsheets/ESS_Basics_SecurityRoles.pdf
- **Security Roles** - Click the following link for the tutorial on how to look up your security roles.
https://my.it.miami.edu/wda/erpsec/tipsheets/ESS_Basics_SecurityRoles.pdf
- **Process History** formerly known as the “Approval Flow” In order to have visibility to transactions within a Cost Center (accessing requisitions created by others), the user will need the appropriate security in Workday. Purchasing has access to all requisitions created in Workday.
- **Requisition Types** (Checkout > Information tab)
What’s the difference between **Goods, Services, and Service Contracts**?

Goods	Services
Catering	All Standing Purchase Orders (goods and services)
Supplies – clerical, lab, technical	Agreements, Consulting, Contracts
Uniforms	Cleaning of uniforms & laundry service
Dry Ice / Gas Cylinders – one time order	1 Time maintenance (ex: annual tree trimming)
Printing	Dry Ice / Gas Cylinders – (weekly delivery of a standing order)
	Car washes and tree trimming

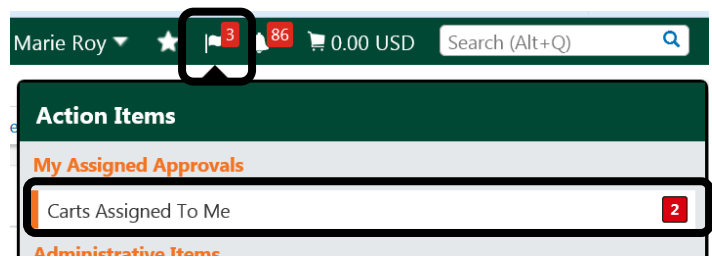
Creating Purchase Requisitions

[View All Tutorials](#)

- Searching for a supplier? Try searching for “Find Supplier” or “Supplier: Subway” or “Supplier: 901.”



- Carts can now be assigned to others and assigned to you. To see if a cart has been assigned to you, go into the catalogs / UMarketplace and click the flag icon (upper right).



- Copying a Umarketplace Previous Cart (use caution as price changes may result in needing to edit or create a new purchase req.) **Purchases > Connect to Supplier Website > (review) OK > Connect > Shop** (left column) > **My Carts and Orders** > Choose from **View Carts, View My Orders (last 90 Days)** or **View My Orders (Ex: last 5 Orders)**
- Copying a Umarketplace Favorites Cart (use caution as price changes may result in needing to edit or create a new purchase req.) **Purchases > Connect to Supplier Website > (review) OK > Connect > Shop** (left column) > **Shopping > View Favorites**
- Does the requisition contain both goods and services from 1 vendor? If the lines can't be itemized (you don't know the exact cost and number of charges) create the lines as services. See the following examples. Note, creating a requisition containing both goods and services will result in 2 Purchase Orders, even if both lines are for the same supplier.

GOODS – all charges can be itemized, are predictable and will exactly match the invoice

REQ / PO	INVOICES
Line 1 - 100 Licenses	50 each + 25 each + 25 each
Line 2 - Maintenance	1 time fee of \$100

SERVICES - maintenance and related supplies will be needed. The amounts and cost are unpredictable.

REQ / PO	INVOICES
Line 1 – \$10,000 maintenance as needed for FY18	\$500 serviced on 6/1/17 Additional emergency services and replacement parts will be needed throughout the year.

Default Shipping Address

To use a different address, click the “X.” Search for the correct address as follows (street address space room number) Ex for 1320 S. Dixie Suite 400.34 search “1320 400.34”

Spend Categories - Common (formerly “Sub Object Codes”)

[Spend Category Conversion Tool](#) (not Internet Explorer friendly)

SUB OBJECT CODES	SPEND CATEGORIES
3233 Chemical	SC08200 Chemicals
3218 Clerical Supplies	SC08218 Clerical Supplies
3229 Copy / Pub /Print-Supplies	SC08229 Photocopy, Publishing, & Printing Supplies
3223 Equipment Supplies	SC08203 Equipment Supplies (non-housekeeping)
3213 Food Supplies	SC08208 Food Supplies
3619 Meetings -Subsistence	SC08619 Food / Beverage during the a business meeting
3623 Food Service	SC08623 Food Service – Interdepartmental charges for catering from UM Dining Services
3624 Entertain - FoodBevRec	SC08624 Entertainment – Food, Beverage, Reception
3234 Gas Cylinders	SC08234 Gas Cylinders
3800 Hotel Conf & Seminars	SC08800 – Hotel Conferences & Seminars
3219 Instructional Supplies	SC08219 Instructional Supplies
4268 Managed Equip Maintenance	SC08047 Managed Equipment Maintenance
5105 Non Food Supplies	SC08621 Goods Services for Personal Use
3811 Other Outside Svcs.	SC08811 Outside Services
5904 Printing	SC08229 Photocopy, Publishing, & Printing Supplies
3227 Promotional Materials	SC08227 Promotional Materials
3225 Technical Supplies	SC08225 Technical Supplies Other

Checking Order Status

[Tutorial for Checking Status](#)

Quickstart: To view the current pending approver: Click the **cloud icon** > **Inbox** > click the **requisition #** > scroll down to **Process History** > Go to the **Status** column and find **Awaiting Action** > the approver’s name appears on the right.

Approving

[Tutorial for Approving](#)

- **WARNING** – Clicking “Deny” will completely delete the order. Once denied, the requisition can no longer be viewed or accessed.

- To view the pending approver: Click the **cloud icon** > **Inbox** > click the req > scroll down to **Process History** > Go to the **Status** column and find **Awaiting Action** > scroll to the right for the approver's name.
- To approve: Click the **cloud icon** > **Inbox** > **Actions** Tab > find and click the **requisition #** > **review details**.
- To **Delegating approval** (options are *Immediate Email*, *Daily Digest Email*, or *Disable*)
Cloud icon > **My Account** > **Change Preferences** > Alerts (Lower left column) > find and adjust the "Send Notification via Channels" field.

Payment

- Suppliers, send invoices to umiamiap@miami.edu.
- Departments, send invoices to Accounts Payable in Workday by clicking "Quicklinks" then "Invoice Submission Form – Accounts Payable."

Change Orders

[Change Order Tutorial](#)

- Initiating a Change Order must come from the CCM (Cost Center Managers) or PDES (Purchase Data Entry Specialist)
- To create a Change Order, find the Purchase Order (not requisition) in Workday, then click the related actions menu and choose "Purchase Order", then "Create Change Order."

Purchase Order Close

[Purchase Order Close Tutorial](#)

- PO Close can't be re-opened. Instead, create a new Purchase Requisition.

Contacts

- **Security Role Changes** - If changes need to be made to the CCM role, contact the ERP team at itsupportcenter@miami.edu
- ERP Finance website - <http://workday-finance.it.miami.edu>