

Completing the Finance Security Role Request Form

Employees that need the *Procurement Data Entry Specialist* role to close purchase orders, initiate change orders, or verify corporate card transactions can use this guide to obtain access for their cost centers. <https://workday.miami.edu>

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2. Complete the top section: TIP: Position Number can be found in Workday by clicking the Profile icon , then Overview .	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th colspan="2" style="text-align: center; font-size: small;">ROLE ASSIGNEE: (UM FACULTY OR STAFF)</th> </tr> </thead> <tbody> <tr> <td style="font-size: x-small;">Name: Michelle Roy</td> <td style="font-size: x-small;">UMID: C#####</td> </tr> <tr> <td style="font-size: x-small;">Phone: (305) 284-2209</td> <td style="font-size: x-small;">Email: mroy@miami.edu</td> </tr> <tr> <td style="font-size: x-small;">Position Number: 5#####</td> <td></td> </tr> </tbody> </table>	ROLE ASSIGNEE: (UM FACULTY OR STAFF)		Name: Michelle Roy	UMID: C#####	Phone: (305) 284-2209	Email: mroy@miami.edu	Position Number: 5#####									
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<p>a. Close POs, initiate change orders, and/or verify PCard transactions, scroll down and check the box for <i>Department Procurement Data Entry Specialist</i>.</p> <div style="text-align: center; margin: 10px 0;"> <input checked="" type="checkbox"/> Department Procurement Data Entry Specialist </div> <p>b. Verify Travel Card transactions, scroll down, and check the box for <i>Department Expense Data Entry Specialist</i>.</p> <div style="text-align: center; margin: 10px 0;"> <input checked="" type="checkbox"/> Department Expense Data Entry Specialist </div>																	
4. Complete the fields for each section as needed:	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <p>a. Type the cost center numbers that will need to be accessed for Closing Purchase Orders and initiating Change Orders.</p> <p>b. Type the end user's name that needs access.</p> </td> <td style="width: 50%; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; font-weight: bold; font-size: small;">Cost Center(s) CCXXXXX</td> <td style="text-align: center; font-weight: bold; font-size: small;">Print Name: Michelle Roy</td> </tr> <tr> <td style="font-size: x-small;">CC12345</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12346</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12347</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12348</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12349</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center; border-top: 1px solid black;">Signature</td> </tr> </table> </td> </tr> </table>	<p>a. Type the cost center numbers that will need to be accessed for Closing Purchase Orders and initiating Change Orders.</p> <p>b. Type the end user's name that needs access.</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; font-weight: bold; font-size: small;">Cost Center(s) CCXXXXX</td> <td style="text-align: center; font-weight: bold; font-size: small;">Print Name: Michelle Roy</td> </tr> <tr> <td style="font-size: x-small;">CC12345</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12346</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12347</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12348</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12349</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center; border-top: 1px solid black;">Signature</td> </tr> </table>	Cost Center(s) CCXXXXX	Print Name: Michelle Roy	CC12345		CC12346		CC12347		CC12348		CC12349			Signature
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5. Print and sign the document.																	
6. Scan and send to help@miami.edu for processing.																	

Example for both *Department Expense Data Entry Specialist* and *Department Procurement Data Entry Specialist*

<input checked="" type="checkbox"/>	Department Expense Data Entry Specialist	This role initiates expense reports and spend authorizations on behalf of other employees. This role initiates check requests to non-employees to reimburse for expenses related to University activities, including travel to campus.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; font-weight: bold; font-size: x-small;">Cost Center(s) CCXXXXX</td> <td style="text-align: center; font-weight: bold; font-size: x-small;">Print Name: Michelle Roy</td> </tr> <tr> <td style="font-size: x-small;">CC12345</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12346</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12347</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12348</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12349</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center; border-top: 1px solid black;">Signature</td> </tr> </table>	Cost Center(s) CCXXXXX	Print Name: Michelle Roy	CC12345		CC12346		CC12347		CC12348		CC12349			Signature
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<input checked="" type="checkbox"/>	Department Procurement Data Entry Specialist	This role initiates PCard transaction reconciliations and purchase requisitions on behalf of other employees. This role initiates a check request to pay suppliers.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center; font-weight: bold; font-size: x-small;">Cost Center(s) CCXXXXX</td> <td style="text-align: center; font-weight: bold; font-size: x-small;">Print Name: Michelle Roy</td> </tr> <tr> <td style="font-size: x-small;">CC12345</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12346</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12347</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12348</td> <td></td> </tr> <tr> <td style="font-size: x-small;">CC12349</td> <td></td> </tr> <tr> <td></td> <td style="text-align: center; border-top: 1px solid black;">Signature</td> </tr> </table>	Cost Center(s) CCXXXXX	Print Name: Michelle Roy	CC12345		CC12346		CC12347		CC12348		CC12349			Signature
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