I am an Accountant. I perform accounting functions for journals, adjustments within journals, and integrations. This role does not exist in Oracle (various roles for creating journals).

**Required Training:**
1. Introduction to Workday Financials - prerequisite
2. Accounting Journals and Accounting Adjustments

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**Accountant**

I am an Accountant. I perform accounting functions for journals, adjustments within journals, and integrations.

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**Security Role: Accountant**

**Tasks I Execute in Workday:**

- I can **create**
  - Accounting Journal (Manual and Bulk).
    - I can manually enter Journals for month end adjustments, depreciation, translation adjustments, and accrued liability for purchase items that have been received but not paid for. I can also perform bulk upload of Journals.
  - Accounting Adjustment. I can create an Accounting Adjustment to reclassify costs on the settled financial transactions.

- I can **reverse**
  - Accounting Journal. I can reverse (correct) a Journal Entry.

- I can **edit**
  - Journal Entry. I can edit a Journal Entry that has not been posted.

- I can **run reports** relevant to accounting, including (but not limited to)
  - Find Journals and Journal Lines. I can run the Find Journals report to search for Journals by user, journal status, fiscal periods, and other criteria.
  - General Ledger Balances
  - General Ledger Details
  - Trial Balance
  - FDM Reference Spotlight Reports. I can run FDM Reference Designated, Gift, Spend, and Revenue reports.

"My staff members come to me for help when they need an accounting adjustment created."
I am an Approver for Account Certification. I approve Account Certifications in Workday. I can note variances during the Account Certification process to prompt my Preparer to remediate any issues.

In today’s current state (Oracle), my role is Approver.

Security Role: Approver for Account Certification

The Approver for Account Certification role is automatically assigned each month based on the worktags included on each Account Certification. This role is assigned via integration and therefore role assignments will not be traditionally collected. Instead, the following roles will be used as part of the Account Certification process to determine the appropriate Approver for a given Account Certification:

- Grant Account Certifier
- Cost Center Manager
- Project Budget Manager
- Unit Gift Manager (non-allocated gifts)

Tasks I Execute in Workday:

- I can approve
  - Account Certification. I can approve an Account Certification to verify the legitimacy, appropriateness, and necessity of transactions recorded against my FDM worktags.

- I can remediate
  - Account Certification Variances. If errors are found in the Account Certification request, I can correct changes that ensure balance between Ledger Account Balance and the Amount to Certify for Account.

"In this role, I'm fiscally responsible for the accounts I'm assigned."
I am an Award Analyst. I am involved in reporting for awards.

Recommended Training:
1. Introduction to Workday Financials

Security Role: Award Analyst

Tasks I Execute in Workday:

- I can access
  - Reporting for Awards. I have access to reporting for awards on which the user is assigned a role. For example, I can assist Lead PI in analyzing report data for specified awards.

“My staff members come to me when they have questions about reporting for awards.”
I am a Cost Center Deposit Specialist. I receive Ad Hoc Bank Transactions in my inbox to record revenue deposits or expenditure credits. I also review and update the FDM worktags for my Ad Hoc Bank Transactions (AHBT).

There is no current role in Oracle.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Reviewing Ad Hoc Bank Transactions

Tasks I Execute in Workday:

- I can perform
  - Ad Hoc Bank Transactions.
  - I can review Ad Hoc Bank Transactions. I can make edits to Ad Hoc Bank Transactions I receive in my inbox to record revenue deposits or expenditure credits.

"Colleagues come to me if they need to enter an Expenditure Credit or deposit revenue."
Security Role: Cost Center Financial Analyst

I am a Cost Center Financial Analyst. I view financial reports.

Recommended Training:
1. Introduction to Workday Financials

Tasks I Execute in Workday:

- I can view
  - Financial Reports. I can view financial reports for assigned cost centers, including manager financial reports and metrics and spend analytics.

“My staff members come to me when they need help accessing financial reports.”
Security Role: Cost Center Fiscal Specialist

Tasks I Execute in Workday:

- I can **prepare**
  - Account Certification. I prepare Account Certifications to ensure that all transactions are appropriate, necessary, and supported by documentation.

- I can **remediate**
  - Account Certification Variances. If errors are found in the Account Certification request, I can note a variance and ultimately resolve the variance.

This role will be used as part of the Account Certification process to determine the appropriate Preparer for a given Account Certification.

“My staff members come to me when they need Account Certifications prepared.”
I am a Cost Center Manager. I approve financial transactions and Account Certifications.

In today's current state, my role is similar to Fiscal Administrator.

**Recommended Training:**
1. Introduction to Workday Financials
2. Cost Center Manager Approvals
3. Account Certification

"My staff members come to me when they need customer invoices approved."

**Security Role: Cost Center Manager**

**Tasks I Execute in Workday:**

- **I can approve**
  - Financial transactions. *I can approve financial accounting and revenue business processes, including accounting journals, customer invoices, and internal service deliveries.*

- **I can approve**
  - Account Certification. *I can approve an Account Certification to verify the legitimacy, appropriateness, and necessity of transactions recorded against my FDM worktags.*

- **I can remediate**
  - Account Certification Variances. *If errors are found in the Account Certification request, I can correct changes that ensure balance between Ledger Account Balance and the Amount to Certify for Account.*
I am a Customer Billing Specialist. I perform tasks related to creating and managing customers, invoices, and invoice adjustments.

In today's current state (Oracle), my role is UVA AR Billing Specialist.

Required Training:
1. Introduction to Workday Financials - prerequisite
2. Customer Accounts

Recommended Training:
1. Customer Contracts and Billing Installments

Security Role: Customer Billing Specialist

Tasks I Execute in Workday:

• I can create
  • Customers. I can create a customer to bill someone outside the University for goods/services provided.

• I can add / edit
  • Customer Contact. I can setup customer contacts if needed after a created customer has been approved.

• I can change
  • Customer Summary. I can change the customer's name, customer category, or status.

• I can adjust
  • Customer Invoice. I can adjust a customer invoice, using invoice adjustment or credit and rebill.

• I can request
  • Customer Portal. I can request that a Customer Portal be created on behalf of a customer.

• I can create, print & email
  • Customer Invoice. I can create, print and email a Customer Invoice by printing the Customer Invoice in Workday or pulling the PDF from the Invoice record in Workday once a customer is created and active in Workday.
  • Customer Statements. I can create, print and email a Customer Statement to remind customers about their outstanding invoices and provide details of their account activity.
  • Consolidated Customer Invoice. I can create, print, and email consolidated customer invoices for selected customers.

• I can manage
  • Document Delivery. I can setup and manage document delivery after a Customer has been created to enable the emailing of Customer Documents.

"My staff members come to me when they need customer invoices adjusted."
Customer Contract Specialist

I am a Customer Contract Specialist. I perform tasks related to the creation and management of Customers, Customer Contracts, and Invoices.

This role did not exist in Oracle.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Customer Accounts

Tasks I Execute in Workday:

- I can create
  - Customers. I can create a customer to bill someone outside the University for goods/services provided.
  - Customer Contract. I can create Customer Contracts allowing me to systematically manage contract amounts, billing, and invoicing for approved contracts.
  - Billing Schedule for Customer Contract. I can create a billing schedule to manage the billing installments established by the Contract's terms.
  - Customer Invoices for Billing Installments. I can create the invoices based on the billing schedule for Customer Contracts.

- I can add / edit
  - Customer Contact. I can setup customer contacts if needed after a created customer has been approved.

- I can change
  - Customer Summary. I can change the customer's name, customer category, or status.

- I can adjust
  - Customer Invoice. I can adjust a customer invoice, using invoice adjustment or credit and rebill.

- I can amend
  - Customer Contract. I can amend details of existing customer contracts to update information such as the contract amount, the contract status, and update Worktags to create a new version of the contract.

- I can create, print & email
  - Customer Invoice. I can create, print and email a Customer Invoice by printing the Customer Invoice in Workday or pulling the PDF from the Invoice record in Workday once a customer is created and active in Workday.
  - Customer Statements. I can create, print and email a Customer Statement to remind customers about their outstanding invoices and provide details of their account activity.
  - Consolidated Customer Invoice. I can create, print, and email consolidated customer invoices for selected customers.

- I can manage
  - Document Delivery. I can setup document delivery if needed after a created customer has been approved.

- I can request
  - Customer Portal. I can request that a Customer Portal be created on behalf of a customer.
I am an Expense Data Entry Specialist. I perform data entry and modifications for expense reports.

In today’s current state (Chrome River), my role is Super-Delegate.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Expense Reports for Expense Ambassadors (instructor-led) or Expense Reports (self-paced course in Workday Learning)

Tasks I Execute in Workday:

- **I can create**
  - Expense report for Worker. I can create a report entailing bonafide business expenses for workers including requesting reimbursements and reconciling credit card transactions.
  - Expense Report for Intercompany. I can create an intercompany expense report that differs from Self/Worker in the Expense Line level.
  - Spend Authorization for Intercompany/Worker. I can create a report for authorization to spend money and get approval to take the companion and be reimbursed by UVA.

- **I can view, edit, change, and cancel**
  - Expense Report. I can view, change, edit, and cancel existing expense reports depending on the status of the report.

- **I can view**
  - Reports. I can navigate through and view reports in Workday that are in progress, draft stage, or approved.

- **I can perform**
  - Expense Reporting and Authorization in the Workday App.

“My staff members come to me for help when data entry or modifications must be made for workers or intercompany expenses.”
Security Role: Expense Support Specialist

Tasks I Execute in Workday:

- I can approve
  - Expense Reports. I am the first approver of all expense reports. I have review capabilities and can edit all fields of an expense report. I can also return an expense report to its initiator to make updates if needed. I am the only security group who can review/edit during expense report approval.

As part of the approval process, I certify that worktags are correct, documentation is attached, and expenses are within policy (e.g., meal per diems are correct).

“My staff members come to me when they need expense reports reviewed and approved.”
Security Role: Grant Account Certifier

Grant Account Certifier

I am a Grant Account Certifier. I approve Account Certifications.

In today’s current state (Oracle), my role is Project Account Certifier.

Recommended Training:
1. Introduction to Workday Financials
2. Account Certification

This role will be used as part of the Account Certification process to determine the appropriate Approver for a given Account Certification.

Tasks I Execute in Workday:

- I can **approve**
  - Account Certification. I can approve an Account Certification to verify the legitimacy, appropriateness, and necessity of transactions recorded against my FDM worktags.

- I can **remediate**
  - Account Certification Variances. If errors are found in the Account Certification request, I can correct changes that ensure balance between Ledger Account Balance and the Amount to Certify for Account.

"My staff members come to me for help with Grant-related Account Certification approvals."
I am a Grants Compliance Reviewer. I review and approve payroll accounting adjustments.

Recommended Training:
1. Introduction to Workday Financials

Security Role: Grants Compliance Reviewer

**Tasks I Execute in Workday:**

- I can **review and approve**
  - Payroll Accounting Adjustments. When specific criteria are met, I approve Payroll Accounting Adjustment, Accounting Journal, Accounting Journal Intercompany, Accounting Journal Unpost Intercompany, Accounting Journal Unpost-Reverse, Period Activity Pay, and Request One-Time Payment events.

“My staff members come to me when they need payroll accounting adjustments reviewed and approved.”
I am a Grant Financial Analyst. I view and run reports for the Grants on which I am assigned and prepare Account Certifications.

**Recommended Training:**
1. Introduction to Workday Financials
2. Account Certification

**Tasks I Execute in Workday:**

1. **I can view and run**
   - Reports. I can view and run reports for the Grants on which I am assigned. I cannot initiate any business processes or receive any business processes for review or approval.

2. **I can prepare**
   - Account Certification. I prepare Account Certifications to ensure that all transactions are appropriate, necessary, and supported by documentation.

3. **I can remediate**
   - Account Certification Variances. If errors are found in the Account Certification request, I can note a variance and ultimately resolve the variance.

“My staff members come to me for help running reports for certain Grants.”

This role will be used as part of the Account Certification process to determine the appropriate Preparer for a given Account Certification.
I am a Grant Manager. I am responsible for the day-to-day management of grants.

In today's current state (Oracle), my role is Grant Manager.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Grants Management

My staff members come to me for help when they have questions about grant reports or grant spending.

Tasks I Execute in Workday:

• I can create
  • Budget Amendment. I can move budgets between object classes associated with spend categories, resulting in net zero budget change within the Grant.

• I can view and complete
  • Award Tasks. I can view the alerts related to the Award Tasks and take necessary actions on the Award Tasks.

• I can approve
  • Financial transactions. I can approve financial accounting and revenue business processes, including accounting journals, customer invoices, and internal service deliveries.

"My staff members come to me for help when they have questions about grant reports or grant spending."
I am an Internal Service Delivery (ISD) Data Entry Specialist. I perform edits and cancellation of ISD events.

In today's current state (Oracle), my role is Internal Service Delivery (ISD) Data Entry Specialist.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Internal Service Delivery

Security Role: Internal Service Delivery (ISD) Data Entry Specialist

Tasks I Execute in Workday:

• I can **create**
  - ISD Event. *I can create ISD events that record information related to ISP provisions.*
  - Internal Catalog (Add Catalog Load Item, Maintain Existing Catalog Item). *I can create a catalog item of ISDs into my Workday Catalog.*

• I can **view**
  - Accounting for ISD. *I can view the accounting logs for ISDs entered in Workday.*

• I can **change**
  - ISD. *I can change information entered regarding ISDs in Workday.*

• I can **request**
  - Cancellation of Existing ISD. *I can request for ISDs to be cancelled should they be incorrect.*

• I can **run reports**
  - Available for ISD. *I can run reports and view specific entries of an ISD in a Workday Catalog.*

"My staff members come to me for help when ISDs need to be created, edited, or requested."
I am an Internal Service Provider Manager. I approve Internal Service Delivery and Catalog Load.

Recommended Training:
1. Introduction to Workday Financials

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Security Role: Internal Service Provider Manager

Tasks I Execute in Workday:

• I can approve
  • Internal Service Delivery and Catalog Load. *I can approve Internal Service Deliveries (ISDs) and Catalog Loads.*

“My staff members come to me when they need an Internal Service Delivery approved.”
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Security Role: Multi Funding Source Access

Tasks I Execute in Workday:

This ACM is created for MFS access for Capital Projects team (Company level role required for MFS setup and processing).

I hold Multi Funding Source Access.

Recommended Training:
1. Introduction to Workday Financials
I am a P2P $10K Requisitioner. I can create purchase requisitions up to $10K without the requisition routing for FDM approvals and can approve purchase requisitions up to $10K if the requisition line is for the cost center in which I have spend authority. I also hold the Procurement Shopper role.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Purchase Requisitions, Purchase Orders and Supplier Invoice Requests

Tasks I Execute in Workday:

- I can create
  - Purchase Requisitions. I can create a purchase requisition in Workday to procure goods and supplies as per UVA’s need from the UVA Marketplace integrated in Workday. If the requisition total is less than $10K in the cost center in which I have spend authority, then it will skip FDM approvals.
    - Note: If the P2P $10K Requisitioner submits a requisition that is greater than $10K, the requisition will route for FDM approvals based on the worktags used on the requisition (P2P Approver, Grant Manager, Unit Gift Manager, or Project Budget Specialist). If the requisition is less than or equal to $10K and the requisition line is for a cost center for which they do NOT have the P2P $10K role assignment, then it will route to the cost center’s P2P $10K Requisitioner for approval. It will not route for more FDM approvals after.

- I can approve
  - Purchase Requisitions. I have purchase requisition approval authority up to $10K for purchases made within cost center that I am assigned to.

“My staff members come to me when they need purchase requisitions up to $10K approved.”
I am a P2P $5K Requisitioner. I can create purchase requisitions up to $5K without the requisition routing for FDM approvals and can approve purchase requisitions up to $5K if the requisition line is for the cost center in which I have spend authority. I also hold the Procurement Shopper role.

**Required Training:**
1. Introduction to Workday Financials – prerequisite
2. Purchase Requisitions, Purchase Orders and Supplier Invoice Requests

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**Tasks I Execute in Workday:**

- **I can create**
  - Purchase Requisitions. I can create a purchase requisition in Workday to procure goods and supplies as per UVA’s need from the UVA Marketplace integrated in Workday. If the requisition total is less than $5K in the cost center in which I have spend authority, then it will skip FDM approvals.
    - Note: If the P2P $5K Requisitioner submits a requisition that is greater than $5K, the requisition will route for FDM approvals based on the worktags used on the requisition (P2P Approver, Grant Manager, Unit Gift Manager, or Project Budget Specialist). If the requisition is less than or equal to $5K and the requisition line is for a cost center for which they do NOT have the P2P $5K role assignment, then it will route to the cost center’s P2P $5K Requisitioner for approval. It will not route for more FDM approvals after.

- **I can approve**
  - Purchase Requisitions. I have purchase requisition approval authority up to $5K for purchases made within cost center that I am assigned to.

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"My staff members come to me when they need purchase requisitions up to $5K approved."
Security Role: P2P Approver

Tasks I Execute in Workday:

- I can **approve**
  - Spend Transactions. *I can approve expense reports, supplier invoice requests, change orders, and spend authorizations.*

“*My staff members come to me when they need Spend transactions approved.*”
I am a Payroll Accounting Adjustment Specialist. I perform accounting adjustments to current and historical payrolls.

In today’s current state (Oracle), my role is UVA LD Specialist.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Payroll Accounting – Accounting Adjustments

Tasks I Execute in Workday:

- I can create
  - Payroll Accounting Adjustments. I can create Payroll Accounting Adjustment for Workers in the Company/Company Hierarchy or Cost Center/Cost Center Hierarchy for which they are assigned.
  - Historical Payroll Accounting Adjustment. I can adjust salary expenses originally posted in Oracle.

- I can request
  - Accounting Adjustment for Self. I can request an accounting adjustment as Workday considers self-adjustment a conflict of interest.

"My staff members come to me for help when payroll accounting values need to be adjusted."
I am a Payroll Costing Manager. I perform costing allocations for workers across all companies and apply HCM business processes where assigned. This role did not exist in Oracle.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Payroll Accounting – Costing Allocation
3. Payroll Accounting – HCM Subtasks

"My staff members come to me for help when employees across companies need payroll assignment or altering."

Tasks I Execute in Workday:

- I can assign
  - Costing Allocation. I can Assign Costing Allocation for ALL workers, regardless of their company and will receive an inbox task on applicable HCM business processes (e.g., Hire, Add Job, and Change Job) for the Cost Center/Cost Center Hierarchy for which I have been assigned.
  - Worker-Position-Earning Costing Allocation. I can assign a costing allocation for a specific earning that a worker will receive on their position so that it is costed to a specific set of FDM worktags separately from how other earnings will be costed.
  - Position Restriction Costing Allocation. I can assign a position-oriented costing allocation.

- I can request
  - Costing Allocation for Self. I can request a costing allocation as Workday considers self-requesting a conflict of interest.

- I can review
  - Period Activity Pay Costing Overrides. I can enter costing overrides on Period Activity Pays so that they are appropriately costed.
  - One Time Payment Costing Overrides. I can enter costing overrides on One Time Payments so that they are appropriately costed.
I am a Payroll Costing Specialist. I perform payroll costing allocation within the company I am assigned.

In today's current state (Oracle), my role is UVA LD Specialist.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Payroll Accounting – Costing Allocation

"My staff members come to me for help when employees within my company need payroll update or assignment."
I am a Petty Custodian. I perform and submit requests for replenishment of a petty checking account.

In today's current state (Oracle), my role is Petty Custodian.

Required Training:
1. Introduction to Workday Financials – prerequisite
2. Petty Cash Account Replenishment

“My staff members come to me for help when they need to submit a request for petty cash replenishment.”

Tasks I Execute in Workday:
- I can create
  - Create Miscellaneous Payment Request. I can request a replenishment of my petty cash account after it is has been established and initially funded.
Preparer for Account Certification

I am a Preparer for Account Certification. I prepare Account Certifications in Workday. I also remediate variances when noted during the Account Certification process.

In today’s current state (Oracle), my role is Fiscal Contact.

Security Role: Preparer for Account Certification

The Preparer for Account Certification role is automatically assigned each month based on the worktags included on each Account Certification. This role is assigned via integration and therefore role assignments will not be traditionally collected. Instead, the following roles will be used as part of the Account Certification process to determine the appropriate Preparer for a given Account Certification:

• Grant Financial Analyst
• Cost Center Fiscal Specialist
• Project Budget Specialist

Tasks I Execute in Workday:

• I can **prepare**
  • Account Certification. I prepare Account Certifications to ensure that all transactions are appropriate, necessary, and supported by documentation.

• I can **remediate**
  • Account Certification Variances. If errors are found in the Account Certification request, I can note a variance and ultimately resolve the variance.

"Colleagues will come to me if they have questions about account certification."
I am a Procurement Shopper. I submit requisitions, create a change order, and view various procurement reports.

In today's current state (Oracle), my role is PO Shopper $1.

**Required Training:**
1. Introduction to Workday Financials – prerequisite
2. Purchase Requisitions, Purchase Orders & Supplier Invoice Requests

**Security Role: Procurement Shopper**

**Tasks I Execute in Workday:**

- **I can create**
  - Requisition Worktags Template
  - Requisition. I can create a purchase requisition in Workday to procure goods and supplies as per UVA’s need from the UVA Marketplace integrated in Workday.

- **I can approve**
  - Supplier Invoice. I can approve supplier invoices over $10,000 that are tied to the PO for which I am the requester. This acknowledges the “receipt” of the goods. I can add an attachment if needed.

- **I can act on**
  - Assigned Cart. I can create a requisition for UVA Marketplace items that an Employee as Self has put into a shopping cart.

- **I can change**
  - Supplier Invoice Request. I can cancel or edit an existing supplier invoice request and copy an existing request to create a new supplier invoice request using the *My Supplier Invoice Requests* report
  - Purchase Requisition. I can change a purchase requisition that has been initiated.
  - Purchase Order. I can change via a change order and make edits to existing purchases such as quantity, costs, and worktags.

**Note on approval:**

Users that hold the Procurement Shopper role but do NOT hold P2P $10K or $5K Requisitioner role do not have any spend authority. In other words, the requisitions they submit will always route for FDM approvals based on worktags used on the requisition (P2P Approver, Grant Manager, Unit Gift Manager, or Project Budget Specialist).

"My staff members come to me when they need to purchase goods or services."
I am a Project Budget Manager. I am responsible for a portfolio of Projects and second level Project-based approvals and can approve Account Certifications.

Recommended Training:
1. Introduction to Workday Financials
2. Account Certification

Tasks I Execute in Workday:

- **I can approve**
  - Project-based Approvals. **I can approve second level Project-based approvals.**

- **I can approve**
  - Account Certification. **I can approve an Account Certification to verify the legitimacy, appropriateness, and necessity of transactions recorded against my FDM worktags.**

- **I can remediate**
  - Account Certification Variances. **If errors are found in the Account Certification request, I can correct changes that ensure balance between Ledger Account Balance and the Amount to Certify for Account.**

This role will be used as part of the Account Certification process to determine the appropriate Approver for a given Account Certification.

“My staff members come to me for help with second level Project-based approvals.”
Security Role: Project Budget Specialist

I am a Project Budget Specialist. I am responsible for reviewing and approving Project-related transactions and for preparing Account Certifications.

Recommended Training:
1. Introduction to Workday Financials
2. Account Certification

Tasks I Execute in Workday:


- I can **prepare** Account Certification. I prepare Account Certifications to ensure that all transactions are appropriate, necessary, and supported by documentation.

- I can **remediate** Account Certification Variances. If errors are found in the Account Certification request, I can note a variance and ultimately resolve the variance.

This role will be used as part of the Account Certification process to determine the appropriate Preparer for a given Account Certification.

“My staff members come to me when they need Project-related transactions reviewed and approved.”
Senior Department Finance Approver

I am a Senior Department Finance Approver. I perform Expense Report exception approvals.

Recommended Training:
1. Introduction to Workday Financials

Security Role: Senior Department Finance Approver

Tasks I Execute in Workday:

- I can approve
  - Expense Report Exceptions. I am responsible for approving all expense report exceptions and requisitions over $250,000, and for approving Delegation requests and quarterly reconciliations.

“My staff members come to me when they need Expense Report exceptions approved.”
I am a Sponsored Programs Manager (Cost Center). I approve Grant Award business processes.

**Recommended Training:**
1. Introduction to Workday Financials

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**Tasks I Execute in Workday:**

- I can **approve**
  - Grant Award Business Processes. I can view grant functions for assigned cost centers and approve grant award business processes.

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“My staff members come to me when they need Grant Award business processes approved.”
I am a Unit Gift Manager. I perform Gift Requests through Workday Extend, run reports on gifts assigned, and approve Account Certifications.

In today’s current state (Oracle), my role is Gift Manager.

**Required Training:**
1. Introduction to Workday Financials – prerequisite
2. Gift Creation

**Recommended Training:**
1. Account Certification

**Security Role: Unit Gift Manager**

**Tasks I Execute in Workday:**

- **I can create**
  - Gift Request (using Workday Extend process). I can create requests, run reports, and view Gift attributes and Gifts assigned to their Cost Centers including navigation to their hierarchies.

- **I can approve**
  - Account Certification. I can approve an Account Certification to verify the legitimacy, appropriateness, and necessity of transactions recorded against my FDM worktags.

- **I can remediate**
  - Account Certification Variances. If errors are found in the Account Certification request, I can correct changes that ensure balance between Ledger Account Balance and the Amount to Certify for Account.

**“My staff members come to me for help when there are gifts to be requested or viewed.”**

This role will be used as part of the Account Certification process to determine the appropriate Approver for a given Account Certification.