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

Complete the Finance Security Role Request Form

1. Complete the **Security Role Request Form - Finance**

2. Complete the top section:
   - **TIP:** Position Number can be found in Workday by clicking the Profile icon, then Overview.

3. For access to:
   - a. Close POs, initiate change orders, and/or verify PCard transactions, scroll down and check the box for **Department Procurement Data Entry Specialist**.
   - b. Verify Travel Card transactions, scroll down, and check the box for **Department Expense Data Entry Specialist**.

4. Complete the fields for each section as needed:
   - a. Type the cost center numbers that will need to be accessed for Closing Purchase Orders and initiating Change Orders.
   - b. Type the end user’s name that needs access.

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**
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