Go-Live July 1

CMSD Workday Finance & Procurement Go-Live Checklist
5 Things You Need To Do for a Successful Transition
Your User ID and Password for Finance & Procurement is the same as HCM/Payroll

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1 Complete Required Workday Training

Instructor Led Procurement Training:

If you purchase goods and/or services for a school or department you will receive an invitation to attend training.

If you have not received an invitation or have missed your assigned training session, please contact:

- maria.monroig@clevelandmetroschools.org or
- angela.wolfe@clevelandmetroschools.org

Self-Serve Training: For employees who submit requests for reimbursement.

- Go to: http://www.clevelandmetroschools.org/Page/11869 to review Spend Authorization/Expense Reports job aids.

3 Review Job Aids, Training Materials and FAQs
Workday Website

Go to: http://www.clevelandmetroschools.org/Page/9154

Quick Links

Login to Workday@CMSD

– Training Materials / Job Aids

   Employee Self Service

   Manager & Timekeeper Self Service

   Finance & Procurement Self Service

Workday on Mobile

Tips & Tricks

What's New with Workday

FAQ's

Review training materials under the following categories:

- **Procurement** (Procurement Course, Procurement Process Flow, Job Aids)
- **Spend Authorization/Expense Reimbursement** (Spend Authorization Course, Spend Authorization Process Flow, Job Aids)

Review Q&As under all topics *from* Purchase Orders/Change Orders/Requisitions/Tracking Invoices *to* System Access & Training.

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2 Know Where to Go for Help

Helpdesk Support: 216.838.0440
Support Days & Hours: M-F, 6am-8pm

Types of Support provided:

- Workday issue diagnosis
- How to execute a Workday process
- Finance and Procurement self-service support

Finance & Procurement Go-Live Office Hours *(Limited Time Only)*

Available to help resolve errors, answer worktag and cost center questions, and assist with split or complicated transactions.

Downtown: July 5 - July 14, 9am-4pm

- July 5 - July 13: Rooms: 1781 and 1911A
- July 14: Room 1813

EPC: Rm 304 - July 24 - August 4, 9am-4pm

4 Principals & Cost Center Managers Only
Know How to Approve Procurement Transactions

Go to:
http://www.clevelandmetroschools.org/Page/11869 to review the following job aids.

- **11** Approve Requisition
- **15** Approve a Purchase Order–Change Order
- **18** Approve a Supplier Contract – Contract Amendment

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5 Complete This Step On or After July 1, 2017
Buyers Only – Verify Access to Create Purchase Orders
(Employees who purchase goods and/or services for a school or department)

Add or Confirm Your Procurement Worklets

New Workday Worklets

My Recent Purchase Orders | Purchases | My Requisitions

Follow instruction on the **Getting started:**
Use Tools and Navigator job aid at:
http://www.clevelandmetroschools.org/cms/lib05/OH01915844/Centricity/Domain/3808/ToolsNav-JA-26.pdf

Verify Access to Workday Procurement *(follow the steps below)*

STEP 1: Type Create Purc Order in search bar and hit enter.

   🏠 🔍 Create Purc Order

Home

STEP 2: If you see the Create Purchase Order option on the Tasks and Reports menu, you have verified your access. *If you do not see the Create Purchase Order option, contact the helpdesk to request access.*

Search Results 3 items

Tasks and Reports

Create Purchase Order