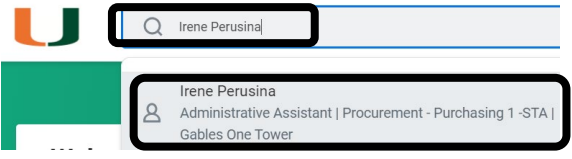
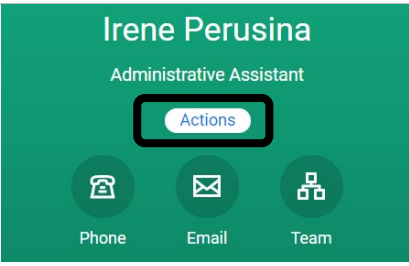


# Security Roles - Process PCard Transactions for Another Employee in Workday

<http://workday.miami.edu>

The security role *Department Procurement Data Entry Specialist* ("PDES") is required to process PCard transactions for another employee. Access is granted only for the cost centers specified on the [Security Role Request Form - Finance](#).

Check for Access									
1. Log into Workday.	<a href="https://workday.miami.edu">https://workday.miami.edu</a>								
2. <b>Type the cardholder's name</b> in the search box and <b>select it from the drop-down</b> menu.									
3. Click <b>Actions</b> .									
4. <b>For Expenses (Travel Card)</b> From the left side, find and hover over <b>Expenses (Travel Card)</b> .	If the option <b>Create Expense Report for Worker</b> appears, then you already have access and can scroll down to see any pending transactions.								
Obtain Access by Completing a Security Role Request Form (Finance)									
5. Find the <a href="#">Security Role Request Form - Finance</a>									
6. Complete the top section: <b>TIP:</b> <i>Position Number</i> can be found in Workday by clicking the <b>Profile icon</b> , then <b>Overview</b> .	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d3d3d3;"> <th colspan="2" style="text-align: center; padding: 2px;">ROLE ASSIGNEE: (UM FACULTY OR STAFF)</th> </tr> </thead> <tbody> <tr> <td style="padding: 2px;">Name: Michelle Roy</td> <td style="padding: 2px;">UMID: C#####</td> </tr> <tr> <td style="padding: 2px;">Phone: (305) 284-2209</td> <td style="padding: 2px;">Email: mroy@miami.edu</td> </tr> <tr> <td style="padding: 2px;">Position Number: 5#####</td> <td style="padding: 2px;"></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#####	
ROLE ASSIGNEE: (UM FACULTY OR STAFF)									
Name: Michelle Roy	UMID: C#####								
Phone: (305) 284-2209	Email: mroy@miami.edu								
Position Number: 5#####									
7. <b>For Travel Card Access:</b> Scroll down and check the box for <b>Department Expense Data Entry Specialist</b> .	<b>For PCard Access:</b> Scroll down and check the box for <b>Department Procurement Data Entry Specialist</b> .								
<input type="checkbox"/> Department Expense Data Entry Specialist	<input type="checkbox"/> Department Procurement Data Entry Specialist								

<p>8. Complete the fields for each section as needed:</p> <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>	<p><b><u>Cost Center(s)</u></b>  <b><u>CCXXXXX</u></b></p> <p>CC12345  CC12346  CC12347  CC12348  CC12349</p>	<p><b>Print Name:</b>  <u>Michelle Roy</u></p> <p>_____  Signature</p>
<p>9. Print and sign the document. _____</p>		
<p>10. Scan and send to <a href="mailto:help@miami.edu">help@miami.edu</a> for processing.</p>		