Important: Principal Investigator (PI) Role Added to Approval Loops

As of Monday, October 23, in response to feedback from research faculty, the Principal Investigator (PI) role in Workday was configured with an approval step in the approval workflow for the following business processes:

- Purchase Requisitions, Change Orders, Ad Hoc Payments, Check Requests, And Procurement Card Reconciliations
- Travel and Expense reimbursement (Workday process - Expense Report)
- Interdepartmental requisitions (Workday process - Internal Service Delivery (ISD) Documents)

Please note this change will only impact new business processes initiated on or after Monday, October 23.

Upon receiving the task in their inbox, PIs can either:
1. **Approve/Send Back/Deny Task** – This allows a PI to choose to approve, send back, or deny the submission

OR
2. **Delegate Task** – This allows a PI to give access to another user to initiate and/or approve tasks in Workday on their behalf.

To learn how to access and complete tasks, please view this tip sheet.

This change will also be communicated to your Cost Center Sponsored Program Manager (CCSPM) and Cost Center Manager (CCM). A webinar will be available at the end of October to cover these updates. Details on this webinar will be communicated next week.

If you have any questions, please contact the UMIT Service Desk: (305) 284-6565 or help@miami.edu.

Thank you.

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