Roles to Review

EXPENSE SUPPORT SPECIALIST

First approver for expense reports for area. Certify that worktags are correct, documentation is attached, and expenses are within policy guidelines. may edit the expense report during the approval process

- Approve expense reports
- Review/edit all fields of an expense report
- Return expense reports to initiators

GRANT MANAGER

Manage grants including moving budgets between object classes associated with spend categories; view alerts related to Award tasks; approve financial accounting and revenue business processes, including accounting journals, customer invoices, and internal service deliveries

- Create budget amendments
- View and complete award tasks
- Approve financial transactions

P2P APPROVER

Approve spend transactions such as expense reports, supplier invoice requests, change orders, and spend authorizations

- Approve expense reports
- Approve supplier invoice requests
- Approve change orders
- Approve spend authorizations

UNIT GIFT MANAGER

Perform gift requests through Workday Extend; run reports on gifts assigned; approve Account Certifications to verify the legitimacy, appropriateness, and necessity of transactions recorded against FDM worktags

- Create Gift Requests
- Run reports
- Approve operational transactions and manual journals on assigned gift worktags
- Approve Account Certifications

PROJECT BUDGET SPECIALIST

Responsible for reviewing and approving Project-related transactions and for preparing Account Certifications to ensure that all transactions are appropriate, necessary, and supported by documentation

- Review and approve Project-related transactions
- Prepare Account Certifications
- Remediate Account Certification Variances

SENIOR DEPARTMENT FINANCE APPROVER

Approve expense report exceptions and requisitions over $250,000, delegation requests, and quarterly reconciliations; approve requests for Workday security roles

- Approve Expense Report exceptions
- Approve requisitions over $250,000
- Approve delegation requests
- Perform quarterly reconciliations
- Approve requests for Workday security roles