Weekly Wrap-up

Dear Hamilton Community,

As we come together to navigate our ongoing initiatives, we want to take a moment to pause and reflect on the contributions of a remarkable individual who was instrumental in our journey.

In Memory of Marty Sweeney

Marty Sweeney, Director of Enterprise Information Systems, dedicated over 21 years to Hamilton College, playing a pivotal role in our technological advancements, including the implementation of Workday. His collaborative spirit and talent for making complex technical concepts accessible benefited faculty, staff, and students alike. Marty's commitment to enhancing our campus community will leave a lasting impact, and he will be deeply missed.

Let us keep his contributions in mind as we continue our work together.

Now, we invite you to delve into the rest of this newsletter, where we'll explore the next steps in our procurement processes and how we can build on the strong foundation he helped establish.

Featured Training Topic

Procurement & Purchasing

We're here to provide the resources and clarity you need to keep everything running smoothly, from supplier invoices to purchase orders and everything in between.

Resources:
- [Purchasing/Procurement Video](#)
- [Corporate Procurement Card Video](#)
- [Job Aids](#)

## Workday Wisdom: Mastering Related Actions

If you need to **update** a Procurement Card Transaction or revise a Supplier Invoice Request in Workday, the **Related Actions** feature is your go-to tool for efficiently finding and modifying these records.

Why Use Related Actions?
The **Related Actions** feature in Workday helps you efficiently manage procurement and payable items without needing to start over. Whether you're verifying transactions or updating invoices, this tool allows you to quickly make edits and keep your work

streamlined.
Here's how to access the **Related Actions** menu when managing these processes.
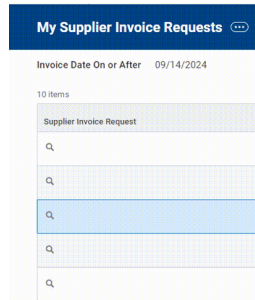
Modifying Supplier Invoice Requests

To view your Supplier Invoice Requests, search "*My Supplier Invoice Requests*," then filter as needed. Hover to the right of the magnifying glass to find the **Related Actions** icon.

For full detailed instructions, check out the Job Aid section on **Viewing Supplier Invoice Requests**.
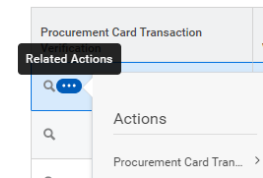
Editing or Completing Procurement Card Transaction Verification

Select *Procurement Card Transaction Verifications* on the *Purchases* app. Hover to the right of the magnifying glass icon next to the draft transaction to display the **Related Actions** icon.
For full detailed instructions, check out the Job Aid section on **Viewing Procurement Card Transaction Verifications**.

Coming Soon: Open Enrollment

Mark your calendars for **November 4–15**! This year, Open Enrollment will be completed through Workday. More information will be shared soon by the Human Resources team. Get a sneak preview of the **2025 Benefits Guidebook here**.

When is Itemization used?

Itemizing, or splitting accounts, is only necessary when you need to divide the cost of a single expense line across multiple funding sources—such as different funds, cost centers, or programs. This feature is available in both **Expenses** as *Itemization* and **Purchases** as *Splits*, but it's **not required for every transaction**.

If an expense is funded from **multiple sources**, you'll need to use the itemization tool. **For most purchases, you do not need to itemize.** Avoid over-complicating reports by individually allocating costs for every single item unless required. Splitting lines **is** necessary on a PO if there are line items that would be partially received.

Itemization Option in an Expense Report
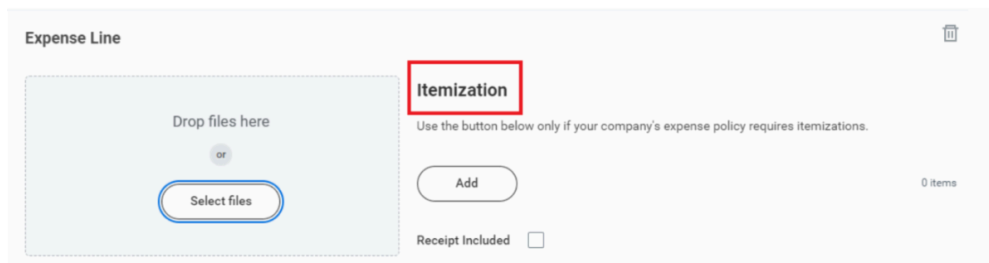
Split Option in a Supplier Invoice Request

Lines 1 item									
Spend Category	Quantity	Unit Cost	Unit of Measure	Extended Amount	Amount	Billable	Memo	Internal Memo	Splits
	0	0		0		☐			

Thank you for staying engaged with the latest updates. As we work to enhance and streamline our processes, we encourage you to utilize the available resources to help you navigate Workday with ease.

Next week, we will share valuable updates on new assistance and guidance tools within the Workday platform. Stay tuned for tips and resources designed to help you navigate the system even more efficiently! If you need any assistance in the meantime, please don't hesitate to reach out.

Wishing you a wonderful Workday!

Maureen H. Scoones
Workday Change Manager

315-859-4178
mscoones@hamilton.edu

Shelly L. Hall
Documentation and End User Training Specialist

315-859-3454
slhall@hamilton.edu

Lauren E. Waszkiewicz
Communications and Training Coordinator

315-859-4677
lwaszkie@hamilton.edu

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