Welcome to the Workday Knowledge Base. Search or browse Workday Training materials and FAQs below.

For more resources, visit: Modernization Initiative website | Workday Training Catalog | About Workday Training

Workday Training Reference Guides

Reference Guides walk you through Workday processes step-by-step. Browse by category below, or use the search box above to look for key words.

The Reference Guides below are subject to change as Workday for WSU is refined during sustainment, and afterward, twice-yearly system updates. Please be wary of storing outdated training materials locally, and always check back here for the most up-to-date and accurate materials.

Workday Reference Guides are meant to provide step-by-step guidance at the highest level for each business process, with emphasis on standardization.

All Employees

Employee Self-Service and Manager Self-Service

In Workday, tasks anyone can complete are called Employee Self-Service. Tasks managers must complete are called Manager Self-Service. By default, all WSU employees will have access to Employee Self-Service, and those who are in a management role will have access to Manager Self-Service.

- Apply for Internal Posting
- Change Benefits
- Complete Federal Withholding Elections
- Complete Payment Elections
- Create Spend Authorization
- Delegation
- Employee Request a Leave of Absence
- Enter and Correct Time
- Modify Personal Information
- Request Overtime
- Request Work Schedule
- Submit Resignation

Finance

Accounting
- Accounting Journal Reversal
- Cost transfer
- Create Accounting Journals
- Debt
- Period Close
- Request FDM Element

Assets
- Dispose Asset
- Issue Asset
- Register Asset
- Remove Asset
- Share Asset
- Transfer Asset

Budgets
- Create Budget Amendment
- View Position Budget
- Tools and Navigation
- Using Workday Reports
- View and Print W-2 Year End Form
- View Your Payslip
- Workday Inbox and Notifications
- Workday Mobile

Customer Contracts and Receivables
- Create Customer
- Create Customer Contract
- Create Customer Deposit
- Create Customer Refund
- Record Cash Sale

Endowments
- Investment Pool Adjustment
- Investment Pool Purchase
- Investment Pool Sale
- Investment Pool Transfer
- Investment Statement Event
- Treasury

Travel and Expenses
- Create Expense Report
- Create Spend Authorization

Human Resources

Academic
- Add and Update Academic Appointments

Benefits
- Change Benefits

Compensation
- Change Default Compensation
- Period Activity Pay
- Request Comp Change
- Request Onetime Payment
- Request Post Termination Compensation

Recruiting
- Add and Update Academic Appointments
- Apply for Internal Posting
- Create Job Requisition
- Freeze Job Requisition
- Manage Job Application
- Post Job Requisition
- Refer a Candidate

Time, Leave, and Absence

Grants
- Award Budget Amendment
- Award Budget to Actuals Dashboard Reports
- Award Closeout
- Awards Grants Troubleshooting
- Correct Amend Award
- Create Award
- Create Billing Schedule for Awards
- Create Request for Overdraft Grant Transfer
- Create Sponsor Invoice
- Create Sponsored Account Request
- Effort Certification
- Letter of Credit Draw Down Event
- Record Customer Payment and Create Customer Deposit

Endowments
- Investment Pool Adjustment
- Investment Pool Purchase
- Investment Pool Sale
- Investment Pool Transfer
- Investment Statement Event
- Treasury

Travel and Expenses
- Create Expense Report
- Create Spend Authorization

Customer Contracts and Receivables
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- Create Customer Contract
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- Create Customer Refund
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- Create Billing Schedule for Awards
- Create Request for Overdraft Grant Transfer
- Create Sponsor Invoice
- Create Sponsored Account Request
- Effort Certification
- Letter of Credit Draw Down Event
- Record Customer Payment and Create Customer Deposit
• Employee Request a Leave of Absence
• Employee Request and Correct Time Off
• Enter and Correct Time
• General Time and Absence
• Initiate and Approve Leave of Absence
• Manage Time and Absence
  HR Partner
• Manage Time and Absence
  Manager
• Manage Time and Absence
  Timekeeper
• Manage Time Behalf Employee
• Request Overtime
• Request Work Schedule

**Staffing**

• Add Additional Job
• Change Job
• Change Job and Add Job
• Create Close Position
• Create External Committee Member
• Hire New Employee or Contingent Worker
• Manage Union Membership
• New Hire Onboarding
• Submit Resignation

**Payroll**

• Assign Costing Allocation
• Assign Pay Group
• Assign Pay Group for Position Restrictions Event
• Change No Retro Prior To Date
• Complete Federal Withholding Elections
• Complete Pay Group
• Complete Payment Elections
• Complete State and Local Withholding Elections
• Create Initial Payroll Commitments
• Create Payroll Accounting Adjustments
• View and Print W-2 Year End Form

**Procurement**

• 1099 Miscellaneous adjustments
• Contract Request
• Create a Recurring Supplier Invoice
• Create Ad Hoc Bank Payment
• Create and Change Purchase Order
• Create New Internal Service Provider
• Create Receipt
• Create Requisition
• Create Return
• Create Supplier
• Create Supplier Contract
• Create Supplier Contract Amendments
• Create Supplier Invoice
• Create Supplier Invoice Request
• Create Supplier Request
• Credit Card Administration
• Internal Service Delivery
• Mass close procurement documents
• Order From Supplier Connection
• Remit To Supplier Connection
Browse Frequently Asked Questions (FAQs) by category

General questions about the Modernization Project

- How can I stay up-to-date on Modernization project information?
- How is the Modernization Team structured?
- How is the project being funded?
- How long will Deloitte stay with WSU to support the implementation?
- How much will the project cost?
- How will the switch to Workday affect WSU students?
- What are you trying to modernize?
- What is the timeline for implementing the Workday software?
- What will happen to the Modernization Team after workday has been implemented?
- When will I receive training?
- Which systems will be impacted?
- Who can I contact if I have questions?
- Who is Deloitte?
- Will the BPPM and/or policies be revised?
- Will this project involve everyone at WSU, regardless of their location?
- Will WSU run parallel systems?

About Workday

- Does Workday provide accessibility support? What kinds?
- ESG SFTP and WinSCP Support
- I work with fiscal staff and we need to purchase desktop scanners to scan and clean up images. Is there a certain brand of scanners that work best with Workday?
- Occasionally, my department must scan fragile images or images irregular in shape. What make or model of scanners would work

Modernization Project Extension

- Does this change the scope of the project?
- How and when did you decide to extend the timeline?
- How can I stay up-to-date on Modernization project information?
- How does this affect the Change Network?
- How does WSU’s project compare to other universities’ major software implementation projects?
- What are the business implications – how will this affect general operations?
- What is the new timeline?
- What will you work on until launch?
- When will I get training?
- Why does this take so long?
- Why extend the project 6 months, as opposed to more or less time?
- Why is the project being extended?
- Will the consulting firm stay for the remainder of the project?
- Will there be project staffing changes?
- Will this cost more money?

The future state

- How many years of data will be transferred to the new system?
- How will implementing Workday impact my paycheck or how I report time?
- How will implementing Workday impact staffing?
- How will performance management change?
- What is our data warehouse/reporting strategy?
best for this case? How are these makes or models different from other scanners WSU uses?

- What browsers support Workday on mobile devices?
- What is Workday?
- What model of scanners should my department use if we just need to scan regular images? How much do the models cost and what are the differences between them?
- Which browsers can I use Workday with on my computer?
- Will Workday be customized for WSU?
- Will Workday support multiple languages?
- Workday supports the latest version of browser X, but WSU has only certified the previous version of browser X. What am I supposed to do?

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