Web-Based Training Links for Affiliates and GT Temporary Staff

Overview

The web-based courses for Workday Financials Training are hosted on Georgia Tech HR's Brightspace/D2L site. Access to this site is limited to Georgia Tech staff only. To complete the web-based courses, affiliates and temporary staff will need to access the materials through the links included in this guide.

Considerations

Access to the web-based courses via these links is limited to affiliates and temporary staff only. This guide will be shared with applicable users upon request and should not be shared or copied.

Web-Based Training Materials for Affiliates/Temp Employees

Workday Overview and Basics

This course covers the basics of Workday, including topics such as: navigation, setting up your account to work for you, alerts and errors, getting set up with Workday Mobile.

By the end of this course, users will be able to:

- Understand the scope of the Workday system
- Identify key navigation practices
- Recognize the uses of the Workday Inbox and Notifications
- Set up Workday on your mobile device.

Key Concepts of the Foundation Data Model (FDM)

This course covers the basics of the Foundation Data Model (similar to a chart of accounts). It explains key concepts of Worktags, Hierarchies, and how to use our FDM Crosswalk to translate your current financial terminology into our new FDM Worktag values. **This course is required for those assigned the Accountant security role.**

By the end of this course, users will be able to:

- Understand Workday's Foundation Data Model (FDM)
- Distinguish Driver Worktags and Related Worktags
- Identify Ledger Accounts, Spend Categories, Revenue Categories, and Expense Items
- Utilize the FDM Crosswalk Tool
- Grasp the concept of Hierarchies.

Managing Transactions and Approvals in Workday

This course discusses the basics of a business process in Workday and covers what the difference between reviewing, approving, sending back, or denying is, and how to check on the status of your transaction.

By the end of this course, you will be able to:

- Navigate the Workday business process
- Identify key fields in the approval process
- Create inbox filters to manage your actions
- Manage your transactions
- Set up delegations

Reporting in Workday

This course goes over different ways you can run reports in Workday, demonstrate how to find which reports you can run, explain how to manipulate reports in Workday, and how to request new reports if none meet your business needs.

By the end of this course, you will be able to:

- Find reports in Workday
- Utilize report prompts
- Run reports
- Manipulate report data

Spend Authorizations and Expense Reports

This course explains how to complete spend authorizations and expense reports.

By the end of this course, you will be able to:

- Summarize expense processes in Workday
- Create a Spend Authorization
- Create an Expense Report

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By the end of this course, you will be able to:

- Prepare complex spend authorizations and expense reports for travel
- Understand expense line items
- Prepare a non-trip expense report
- Cancel or Close Spend Authorizations
- Understand Workday Reporting related to expenses.

Expenses for Expense Preparers

This course focuses on T&E Administrators (Expense Preparers in Workday) and dives into how to create expense reports for other employees and non-workers.

By the end of this course, you will be able to:

- Split accounting for expenses
- Establish non-workers in Workday
- Prepare expense reports for non-workers

Procurement Processes in Workday

This course covers the procurement process, focusing on how to create requisitions, how to locate the status of your requisition or purchase order, how to create a change order, and how to create receipts.

By the end of this course, you will be able to:

- Understand the requisition process
- Understand and navigate purchasing through Workday
- Understand the difference between receipt and returns

- Locate Requisitions and Purchase Orders and view their status
- Create a budget amendment for an organization

Supplier Invoice Requests

This video demonstrates how to request a supplier invoice.

Workday PCard Process and Approvals

This video walks users through the new PCard verification and approval process in Workday.

Grants Concepts in Workday

This course for Grants Managers covers the grants lifecycle from when an award is created to how the award is managed, reporting on billing, and award closeout.

By the end of this course, you will be able to:

- Understand the grants driver worktag
- Locate and view awards
- Understand and locate spend restrictions
- Request a new award line and grant

Business Assets in Workday

This course for Property Coordinators will cover Business Asset management for property coordinators and will cover asset registration, asset issuing and transferring, and requesting pickup from surplus.