



Workday Tip Sheets: General Navigation

Audience	Tip Sheet Name
All Employees	Getting Started in Workday for Employees
	Determine Primary Institution and View Multiple Jobs
	Download the Workday Mobile App
	Notification Preferences
	Update Profile Picture
	Add Education
	Workday Icon Glossary
All Managers	Getting Started in Workday for Managers
	Delegations in Workday
ERP Team Members	Workday Community Overview

Workday Tip Sheets: Human Capital Management (HCM)

Functional Area	Audience	Tip Sheet Name
Absence	All Employees	Absence Calendar and Balances
		Considerations for Leave of Absence
		Request and Return Leave of Absence for Employees
	HR Support Roles	Absence Audits and Reports
		Request and Return Leave of Absence for HR Team
Benefits	All Employees	Change Benefit Elections, Dependents, or Beneficiaries
	HR Support Roles	Benefits Management
Compensation	All Managers and Above	Compensation Planning
		Compensation Worker Assignments
		One Time Payment and Allowance Plans

	HR Support Roles	Period Activity Pay Assignments and Management
		Compensation Changes
HCM Core	All Employees	Submit Resignation
		Update Personal Information
	All Managers and Above	Change Job for Managers
		Employee Separation for Managers
	HR Support Roles	Academic Appointments
		Change Job for HR
Employee Separation for HR Partners		
Onboarding	HR Support Roles	Hire and Onboarding
Payroll	All Employees	Payroll 101
	HR Support Roles	Payroll Reports and Audits
Recruiting	All Employees	Applying to Internal Career Opportunities
	All Managers and Above	Create Job Requisition
		Recruitment Process
	HR Support Roles	Evergreen Requisitions
		Initiating an Offer
		Job Requisition Approval
Managing Positions		
Reporting	All Employees	Report Navigation
Talent	All Employees	Complete Evaluation for Managers and Employees
		Launch Performance Evaluation
	HR Support Roles	Performance Reviews

Time Tracking	All Employees	Correcting Time Off Requests for Employees
		Entering Time in Workday
		Time Entry 101
		Requesting Time Off
	All Managers and Above	Approving Time Entries
		Manage Time Off Requests
		Review and Approve Time Off Requests
		Time Entry and Correction on Behalf of an Employee

Workday Tip Sheets: Financial Management (FIN)

Functional Area	Audience	Tip Sheet Name
Accounting	Finance Support Roles	Accounting Adjustments
		Banner-Workday Crosswalk
		Create and View Journals
		Creating or Editing Cost Allocations
		Key Accounting Concepts
		Review Trial Balance
Assets	All Employees	Business Assets Overview
	All Managers and Above	Tracking Business Assets
Banking	All Employees	Create Miscellaneous Payment Request
	All Managers and Above	Review and Approve Miscellaneous Payment Requests
Budgets	Finance Support Roles	Budget Management
Endowments	Finance Support Roles	Gifts and Contributions

Expenses	All Employees	Create, Edit, and Close Spend Authorizations
		Create Expense Reports
		Create Procurement Card Expense Reports
	All Managers and Above	Review and Approve Expense Report for Managers
		Review and Approve Spend Authorizations
FINS Core	All Managers and Above	Foundation Data Model 101
Procurement	All Employees	Create Requisition
	All Managers and Above	Notable Procurement Reports
		Requisition Approval
Suppliers	All Managers and Above	Create Supplier Invoice Requests
	Finance Support Roles	Create Supplier Contracts