Financial Analyst Role

myworkday

You have been assigned the role of **Financial Analyst.** This document contains information specific to your role.

Allows you reporting and viewer access to the various business processes based on your specific role*.

- Gift Financial Analyst
- Cost Center Financial Analyst
- Grant Financial Analyst
- Project Financial Analyst

This is not a complete list

Quick Reference Guides are available within the Resources tab of the respective online module or by clicking the links below:

- Foundational Data Model (FDM)
- Reports
- Finance, Supply Chain, Grant Reports
- HR Reports

Online Training is available in the Learning Exchange by clicking the links below:

- WDES-100: Introduction to Workday
- WDES-101: Workday FDM
- WDES-105: Workday Reporting
- WDFI-102: Reporting for Finance
- WDFI-203-Q1: Gift Accounting for Departments
- WDFI-206: Analyze and Review Expenses
- WDFI-207: Payroll Costing Allocations

Smart Walkthrus are available for the following business processes by clicking **Show Me How** within Workday:

- Delegate Inbox Items/Business Process
- Create Expense Report
- Approve Expense Report
- Payroll Costing Allocation
- Create Purchase Requisition
- Approve Purchase Requisition
- Create Supplier Invoice
- Approve Supplier Invoice
- Create Journal Entry

Smart Walkthrus are continually being added.

Reports are available by typing the following report name* in the search field:

- Budget vs. Actual by Cost Center
- Budget vs. Actual by Revenue Category
- Expense Journal Lines
- Find Purchase Orders
- Find Supplier Invoices
- Income Statement
- General Ledger Activity Summary
- Ledger Detail
- Ledger Account Summaries Report
- Ledger Account Activity Summary

This is not a complete list. Note that access to report data is based on role in Workday

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Additional Information is available using the links below:

- *Security Role questions - submit a Pegasus ticket here*
- Cost Center Translator
- Reporting Crosswalk
- What's Changing with Workday
- Workday Training Hub
- Quick Reference Guides
- Training Questions: email BusinessEducation@vumc.org

Coming Soon