

Instructions: To find a course in the Learning Exchange, enter the Course ID into the search bar. Quick Reference Guides (QRGs) are available on the Resources tab within the course, or below on the <https://vumc.org/myworkday/training-hub> webpage under Supplemental Quick Reference Guides.

Workstream	Course ID	Course Name	Supplemental Resources	Delivery Channel	Topics	Applicable Security Roles
HCM	WDES-100	Introduction to Workday	n/a	WBT	<ul style="list-style-type: none"> - Overview of Workday Homepage - Review search functionality - View Individual Role & Organization Hierarchy - Locate Inbox and Notifications - Using the searchbox 	All
FIN	WDES-101	FDM	1 QRG	WBT	<ul style="list-style-type: none"> -Introduction to the Foundational Data Model -Center numbers and account numbers 	All
ESS	WDES-102	Role-Based Security & Delegation	3 QRGs	WBT	<ul style="list-style-type: none"> - explanation of security roles - overview of available security roles - introduce concept of delegation - show steps to delegate responsibilities 	All
ESS	WDES-103	Workday Mobile	1 QRG	SIM	<ul style="list-style-type: none"> - Downloading the App - Login Credentials (MFA if applicable) - Detail of available functionality on mobile App 	All
HCM	WDES-104	Workday Help	n/a	SIM	<ul style="list-style-type: none"> - Workday Assistant - People Search - overview of Workday Help features - using Workday Help 	All
ESS	WDES-105	Workday Reports	1 QRG	SIM	<ul style="list-style-type: none"> - Overview of Reporting Functionality - List of suggested reports (Standard & Custom) - Setting up automated/subsription reporting 	All

FIN	WDFI-203-Q1	Gift Accounting - Departments	n/a	QRG	<ul style="list-style-type: none"> - Gifts combined on single ID - Distribute gift to multiple faculty members in department - Determine how much is left to spend - Moving across funds / Restricted Release - Gift Purpose 	Gift Financial Analyst, Gift Manager, Investment Pool Manager
FIN	WDFI-206	Analyze and Review Expenses for Finance	n/a	vILT	<ul style="list-style-type: none"> - Less potential for errors due to integrations - Goal is to understand financial performance of department - There is no reconciliation attestation - attestation occurs when users approve expenses - Review departmental financial performance - Best Practices for financial Review (Review GL activity, Revenue reconciliation, Payroll Review) - Identify Journal ID & Sources - Drill to details within reports - Review Dashboards, Standard reports & Custom reports 	Accountant, Common finance configurator
FIN	WDFI-207	Payroll Costing Allocations	1 QRG	QRG	How to create a Payroll Costing Allocation (PCA) in Workday. PCAs are replacing the legacy EDC process.	Manager
FIN	WDFI-207-Q2	Payroll Accounting Adjustments		QRG	How to create a Payroll Accounting Adjustment (PAA) in Workday. PAAs are replacing the legacy RDC process.	Manager

HCM	WDHR-101	Workday HR Overview	n/a	WBT	<ul style="list-style-type: none"> - Explain key functionality and benefits of Workday HCM - Discuss key change impacts from transition to Workday - Explain key HCM processes, including: <ul style="list-style-type: none"> • Absence • Benefits • Compensation • CoreHCM (Service Center) • Payroll • Recruiting • Talent Management 	All HCM roles
HCM	WDHR-102	Reporting for HR	1 QRG	QRG	-crosswalk for legacy HR reports to Workday reports	All HCM roles
HCM	WDHR-201	Time Off Requests	2 QRGs	WBT	<ul style="list-style-type: none"> -time tracking -time off accruals -time off requests -review and approval 	All HCM roles
HCM	WDHR-202	Requesting FMLA Leave (Employees)	2 QRGs	QRG	-How to enter FMLA leave in Workday	All
HCM	WDHR-401	Compensation Review & Adjustments	3 QRGs	WBT	<ul style="list-style-type: none"> - Submit Ad Hoc Compensation Changes for Direct Report - Request One-Time Payment for Direct Report - View Compensation History for Direct Report 	Manager
HCM	WDHR-501	Maintaining Personal Information	1 QRG	WBT	<ul style="list-style-type: none"> - Add/Change Profile Picture - Add/Edit Contact Information - Edit Personal Information (i.e DOB, Marital Status, ID Information, Disability Status, Gender Preference, etc.) - Add/Edit Emergency Contacts 	All
HCM	WDHR-506	Job Changes	3 QRGs	WBT	<ul style="list-style-type: none"> - Promotions - Reclassification of Positions (Job Change) - Standard Hours Change - Transfers - Leave of Absence 	Manager
HCM	WDHR-601	Employee Payroll	3 QRGs	WBT	<ul style="list-style-type: none"> -view payroll documents -update tax elections -payment elections 	All

HCM	WDHR-700	Initiate Hire (outside of recruitment process)	n/a	n/a	- Hire an employee that through a channel other than recruiting (i.e rehire, consultant to perm employee, employee hired as result of personal connections) - All new hire processes, including background review, I9 Verification, manager preboarding activities	Manager
HCM	WDHR-701	Recruiting	3 QRGs	WBT	-overview of recruiting process -post a position -screen candidates -locate scheduled interviews	Manager
HCM	WDHR-706	Refer Candidate to Position	n/a	QRG	refer candidate	All
HCM	WDHR-707	Internal Recruiting	n/a	QRG	- locate open positions of interest - set search paramaters for open positions - apply to an internal, open position	All
HCM	WDHR-709	Track Employee Referrals in Workday	n/a	QRG	track employee referrals	All
HCM	WDHR-710	Onboarding a New Employee	n/a	WBT	- Manager Onboarding Activities (i.e. suggestions of people to meet with, scheduling lunch, getting IT resources ordered, etc.)	Manager
HCM	WDHR-801	Manage Assigned Goals for Employees	n/a	QRG	-How to manage goals assigned to you in Workday Performance Management	All
HCM	WDHR-801-W1	Goal Setting in Workday for Employees	QRG	WBT	-How to set goals in Workday Performance Management	All
HCM	WDHR-801-W2	Annual Performance Review in Workday for Employees	QRG	WBT	-Steps to complete a performance review in Workday Performance Management	All
HCM	WDHR-802-W1	Goal Setting in Workday for People Leaders	1 QRG	WBT	-Goal setting for managers in Workday Performance Management	Manager
HCM	WDHR-802-W3	Giving Feedback in Workday for People Leaders	1 QRG	WBT	-Using Workday Performance Management to give feedback to employees	Manager
HCM	WDHR-802-W2	Reviewing Feedback in Workday for people leaders	n/a	WBT	-Reviewing feedback in Workday Performance Management	Manager
HCM	WDHR-802-W5	Annual Performance Review in Workday for people leaders	n/a	WBT	-Annual Review processfor managers using Workday Performance Management	Manager

HCM	WDHR-808	Performance Improvement	1 QRG	WBT	-talent profiles -initiate performance reviews -set organizational goals -cascade employee goals throughout org	Manager (Based on HCM Supervisor Org),
HCM	WDHR-808	Performance Improvement	1 QRG	WBT	initiate performance improvement plan	Manager
HCM	WDHR-810	Update Talent Profile	1 QRG	WBT	- locate talent profile - add/edit data within talent profile - provide one or two sentence description of talent profile and it's purpose	All
HCM	WDHR-811	Offboarding	1 QRG	WBT	- Initiate termination of direct report (death, resignation, involuntary termination, retirement) - Initiate Termination Payment to Terminated Employee (i.e. Severance) - Eligible for Rehire - Long Term Disability Terminations - Contingent Workers - Document the definition of Termination Date (don't reference current HR system, but hilight the change) - Exit Surveys	Manager
HCM	WDHR-900	Initiate Self-Termination	n/a	QRG	This guide explains how an employee may voluntary resign, or self-terminate, from their current position.	All
FIN	WDPL-201	Capital Planning		TBD	-Using the Capital Planning tool in Workday to identify and plan for captial purchases	TBD
R&G	WDRG-101	Introduction to Research and Grants in Workday	n/a	WBT	-Brief welcome video to Research and Grants Curriculum	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-102	Research and Grants Basic Roles and Terms (Under Construction)	1 QRG	QRG	Frequently used terms in the Workday Awards module and the assigned Workday roles that users will have. (Course will be available/complete approx. 2/13/23)	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-102-Q1	Grant and Awards Roles in Workday	1 QRG	QRG	VUMC Users in the Grants and Research Department are assigned Roles in Workday. The Roles have varying responsibilities and access. The table below is an overview of the Roles, the Domain Security, and the Business Processes for each role.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-102-Q9	View Award and Award Lines in Workday	1 QRG	QRG	-VUMC employees that work on sponsored programs can review Awards and Award lines in Workday. This functionality allows employees with the role of Grants Manager or Grant Budget Specialist to monitor an award's budgeting, funding amount, award tasks and any changes that occur within the award. Follow the steps below to view an award and the award lines.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-103	Research and Grants Training Resources	n/a	WBT	Brief video of training documents and websites for learners.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-120a	Effort Certification for Certifiers in Workday	1 QRG	WBT	Research Grants and Contract Basics in Workday for Departmental users.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-120b	Effort Certification for Grant Managers in Workday	2 QRGs	WBT	This contains a web-based training and two quick guides detailing the Workday Quarterly Effort Certification process for those certifying their effort on federally-funded awards and administrators (with the Workday security role of Grant Manager) who are assisting them. The Grant Manager role in Workday also approves quarterly certification when effort distribution changes are made during the certification process.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-104	Grant Notifications in Workday	n/a	WBT	Grants and Awards in Workday generate Actions, To-Dos, and Award Tasks for employees with roles assigned on an award. Actions, To-Dos, and Awards Tasks are sent as notifications to an Employee's Workday Inbox or Notifications.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-105	Managing Awards Tasks	1 QRG	QRG	How to view award tasks and manage their due dates in Workday	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-102-Q7	Review and Approve Subaward (supplier) Invoice	1 QRG	QRG		Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-102-Q8	Research Roles	1 QRG	QRG		Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-102-Q9	Viewing Awards & Award Line Details	1 QRG	QRG		Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-103	**For Review** WDRG-103: Effort Certification	n/a	WBT	This is for internal VUMC review of the	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-104	Reporting for Research & Grants	1 QRG	QRG	Reporting crosswalk for research and grants	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-105	Managing Award Tasks	1 QRG	vILT	How to view award tasks and manage their due dates. Audience: Departments	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-106	(IN DEVELOPMENT) Demo: View an Award Record	n/a	WBT	This course is expected to be available by 2/15/23. System demo of viewing each tab of an award record)	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-107	PEER-Coeus-Workday Integrations	n/a	WBT	How award information is disseminated from Coeus to Workday and PEER Action Requests.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-108	(IN DEVELOPMENT) Creating an Award	n/a		This course is expected to be available by 2/15/23 Video describing award set up in Workday	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-109	Intro to Award Budgets	n/a	WBT	Introduction to subsequent courses on award budgets and a note about pre-award spending	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-110	Creating and Amending Research Award Budgets	1 QRG	WBT	This simulation and quick guide detail how to create and amend award budgets in Workday. Audience: Departments	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-111	(IN DEVELOPMENT) Adding Award Lines - PEER Action Request			This course is expected to be available by 3/15/23 Directions for creating a PEER action request for adding additional award lines to a grant or contract (will be available/complete approx. 3/15/23) Audience: Departments	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-112	WDRG-112 Cost Transfers			Brief informational video about cost transfers in Workday	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-113	(IN DEVELOPMENT) Demo: Transaction Review and Approval			This course is expected to be available by 2/17/23 System demo of reviewing and approving a transaction on a grant Worktag	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-116	Cost Share for Sponsored Programs (All Employees)	1 QRG	WBT	The is an overview of the changes being made to Cost Share management in Workday. The course contains a video and an attached resource, which is a table of the types of Cost Share in Workday compared to historical Cost Share categories at VUMC. After completing this module, you will be able to: identify the changes to VUMC cost sharing with the implementation of Workday. explain how salary limitations, or salary over the cap, is managed in Workday. distinguish between mandatory and voluntary committed cost share.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-117	Encumbrances	n/a	WBT	How expenses are encumbered and what expenses can be encumbered in Workday	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-118	Pcard Charges for Research in Workday (under construction)		WBT	<i>This course is expected to be available</i>	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-119	Effort Certification Introduction	n/a	WBT	This is a brief introduction to the quarterly effort certification process for employees with effort on federally-funded awards.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-122	Subawards in Workday	n/a	WBT	This video is on the Subaward process	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-123	Request a New Supplier in Workday - Research and Grants	n/a	WBT	Workday allows anyone in the Research and Grants Department to request a new supplier if an existing supplier does not carry needed items. The employee initiates the supplier request and then a manager must approve the request before it is forwarded to a Supplier Contract. Follow the steps in the training to initiate a request for a new supplier.	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-124	Review and Approve Subaward (Supplier) Invoice	n/a	WBT	Locate, review, and approve (or send back) subaward invoices. Audience: Departments	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-125	(IN DEVELOPMENT) Award Closeouts in Workday			This course will be available by 3/15/23	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-126	(IN DEVELOPMENT) Reporting for Research & Grants				Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-127	(IN DEVELOPMENT) Grant Management Dashboard			This course will be available by 3/15/23. Description and screen shots of reports found in the Grant Management Dashboard	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
SCM	WDSC-101	Workday Supply Chain Overview	n/a	WBT		All SCM roles
SCM	WDSC-202	Supplier Master	1 QRG	WBT		
SCM	WDSC-301	Inventory Management - Replenishment, Storage & Movement	3 QRGs	WBT		Inventory Specialist, Inventory Analyst, Inventory Cost Analyst, Inventory Administrator, Inventory Accountant
SCM	WDSC-302	Inventory Management - Cycle and Physical Counts	3 QRGs	WBT		Inventory Specialist, Inventory Analyst, Inventory Cost Analyst, Inventory Administrator, Inventory Accountant
SCM	WDSC-501	How to Purchase	2 QRGs	WBT	-overview of requisition and approval process -requisition types -request materials and services (non-clinical) -request materials and services (clinical)	VUMC Item Master, Procurement Administrator, Buyer, Services Coordinator, Procurement Administrator
SCM	WDSC-503	Receiving	4 QRGs	QRGs	-record receipt of material -create tracking label -determine drop off/putaway locations -invoice reconciliation manage backorders -detail process for managing returns	VUMC Receiver, Supplier Contract Specialist, Inventory Administrator, Inventory cost analyst
SCM	WDSC-601-Q3	Supplier Invoice Request	n/a	QRG	-supplier invoice request	All

SCM	WDSC-606	Expense Reporting	2 QRGs	WBT	<ul style="list-style-type: none"> - Add Manual Expenses - Concur Travel Expenses - Setting Payment Election - Add PCard Expenses & T&E Expenses - Add Mileage - Upload Receipts - Select proper fund for expense item - Itemization of Nightly Hotel Charges - Allocations (unable to split by %) -approval routing (including grant manager) - Delegate creation of Expense Reports -approval of expense reports 	All
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