

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
ESS	WDES-106	Workday Brainstorms	1 QRG	SIM	<ul style="list-style-type: none"> - define a brainstorm - show how to access an existing brainstorm - show how to use a brainstorm 	Central Office Admins

FIN	WDFI-102	Reporting for Finance - Central Office	n/a	QRG	Crosswalk of Legacy Financial Reports with reports and dashboards available in Workday	Business Asset Accountant, Business Asset Manager, Cash Analyst, Cash Manager, Accountant, Accounting Manager, Close Manager, Expense Analyst, Expense Data Entry Specialist, Expense Partner, Tax Manager.
FIN	WDFI-201	Intercompany Accounting	1 QRG	WBT	- What constitutes a company (inner company v. inner worktag) - eliminations	Tax Manager, Business Asset Operations Lead, Revenue Specialist, Accountant, Accounting Manager, Cost Center Financial Analyst, Cost Center Manager, Accounting EIB Security Group
FIN	WDFI-203	Gift Accounting	n/a	vILT	- Setup Gift ID - Attributes on Gift IDs - Type of Accounting Implications for various attributes	Gift Financial Analyst, Gift Manager, Investment Pool Manager
FIN	WDFI-203-Q1	Gift Accounting - Departments	n/a	QRG	- 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-204	Disbursements & Settlements	1 QRG	vILT	- Create Settlement Runs - Process Payments	Banking Settlements Specialist, Cash Manager, Settlement Specialist, Accounts Payable Settlement Specialist, Payroll Settlement Specialist
FIN	WDFI-205	Financial Close for Central Office	3 QRGs	vILT	-overview of close process -Journal entries -accounting adjustments -consolidated reporting -balance sheet reconciliation	Accountant, Common finance configurator

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 Practiess 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-Q1	Payroll Costing Allocations		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
FIN	WDFI-301	Banking	2 QRGs	vILT	<ul style="list-style-type: none"> -Bank fund transfers - Bank reconciliation - Deposits 	Cash Operations Lead, Cash Settlement Specialist, Cash Specialist, Ad Hoc Bank Transaction Requester
FIN	WDFI-401	Fixed Asset Accounting - Central Office	n/a	QRG	<ul style="list-style-type: none"> -Asset registration -Fixed asset maintenance -dispose, retire, transfer assets - fixed asset reporting -capiatl reporting & reconciliations 	Business Asset Accountant, Business Asset Manager, Business Asset Operations Lead, Assistant Controller, Controller, Business Asset Analyst, Business Asset Tracking Specialist, Tax Manager.

FIN	WDFI-501	Project Management	n/a	vILT	-Overview of what is a project in Workday	Project Creator, Project Financial Analyst, Project Hierarchy Manager, Project Manager, Business Asset Analyst
FIN	WDFI-502	Capital Projects	n/a	KT	-overview of project lifecycle -creation of project id - reporting on project spend to date - create project budget - capitalizing a project	Project Creator, Project Financial Analyst, Project Hierarchy Manager, Project Manager, Business Asset Analyst
FIN	WDFI-601	Non-Patient Receivables	n/a	vILT	-overview - cash receipt and application -create a customer account - maintaining customer account - billing - bad debt	Accounts Receivable Analyst, Collections Manager, Collector, Customer Administrator, Customer Billing Specialist, Customer Collections Specialist, Customer Contract Specialist, Customer Deposit Specialist, Customer Payment Specialist
HCM	WDHR-101	Workday HR Overview	n/a	WBT	- 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	n/a	QRG	-crosswalk for legacy HR reports to Workday reports	All HCM roles
HCM	WDHR-104	Workday Help Workspace and Dashboard		SIM	-Workday assistant -people search - overview of Workday help features - using Workday Help	HR Central Office

HCM	WDHR-201	Time Off Requests	2 QRGs	WBT	-time tracking -time off accruals -time off requests -review and approval	All HCM roles
HCM	WDHR-202 Q1	Requesting FMLA Leave (Employees)	n/a	QRG	-How to enter FMLA leave in Workday	All
HCM	WDHR-202 Q2	Return Employee from FMLA Leave (People Leaders)	n/a	QRG	-How to return employee from FMLA leave	Manager
HCM	WDHR-203	Absence for Central Office	n/a	QRG	- Correct time off on behalf of employee - How to approve an employee's time off request	Absence administrator, Absence partner (supervisory)
HCM	WDHR-204	Leave of Absence for Central Office	n/a	QRG	LOA for Managers and FMLA Partners - Submit LOA request on behalf of employee - Review/Approve/Deny leave of absence requests - Detail the types of leave covered LOA for Absence Partners	Absence administrator, Absence partner (supervisory)
HCM	WDHR-301	Benefits Administration	6 QRGs	WBT	-Making benefit elections -open enrollment -new hire enrollment -report life event -change benefit elections -beneficiaries, dependents, & emergency contacts	All
HCM	WDHR-302	Benefits Administration for Central Office	4 QRGs	vILT	-Enroll/Change benefit elections on behalf of employee -Report life event on behalf of employee -cobra -tuition benefit processing	Benefits Partner (Supervisory), Benefits Administrator

HCM	WDHR-401	Compensation Review & Adjustments	1 QRG	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-402	Compensation for Central Office	n/a	VILT	<ul style="list-style-type: none"> -maintain compensation plans -merit and bonuses -request one time payment -severance payments -process ad hoc compensation changes -perform annual compensation review 	Compensation Partner (Supervisory), Compensation Administrator
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-502	Create New Position	1 QRG	WBT	<ul style="list-style-type: none"> - Create position (Manager can Create, but approval still required to post) - post position - Repost/unpost - Change organization assignments for worker - Utilization of Job Codes 	Recruiter, Recruiting Coordinator (Supervisory), Succession Partner, Payroll Interface Partner, Payroll Partner, Talent Pool Manager, HR Administrator, Job and configurator
HCM	WDHR-504	Job Changes	n/a	WBT	<ul style="list-style-type: none"> - Promotions - Reclassification of Positons (Job Change) - Standard Hours Change - Transfers - Leave of Absence 	Manager
HCM	WDHR-505-Q1	Maintain Organization Structures	n/a	QRG	Administrative process for maintaining Organizational structures within Workday	HR Administrator

HCM	WDHR-505-Q2	Position Management	n/a	QRG	Administrative process for maintaining positions with Workday	
HCM	WDHR-506	Manage Contingent Worker Contracts	3 QRGs	WBT	<ul style="list-style-type: none"> - Onboard Contingent workers - Manage Contingent Worker Population - Terminate Contingent Worker - Change Person from Contingent Worker to Employee 	Talent Partner (Supervisory), managers
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-603	Payroll Processing for Central Office	1 QRG	vILT	<ul style="list-style-type: none"> -process on-cycle payroll -create on-demand and off-cycle additional payments 	Payroll Interface Partner, Payroll Partner, Payroll Settlement Specialist, Payroll Administrator, Payroll Auditor, Payroll Calculations Configurator, Payroll Configurator, Payroll Interface Administrator
HCM	WDHR-700	Initiate Hire (outside of recruitment process)	QRG	n/a	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> -overview of recruiting process -post a position -screen candidates -locate scheduled interviews 	Manager
HCM	WDHR-702	Recruiting – Position Management for Central Office	2 QRGs	WBT	<ul style="list-style-type: none"> -Create & maintain job requisitions -assign primary recruiter to position -merge candidate profiles 	Confidential Recruiter (Supervisory), Recruiter (Supervisory), Recruiting Analyst, Recruiting Coordinator, Recruiting Sourcer, HR Administrator, Recruiting Administrator

HCM	WDHR-703	Recruiting – Candidate Screening for Central Office	2 QRGs	WBT	<ul style="list-style-type: none"> -review candidates -schedule interviews using outlook integration -share candidates with manager -review interview results -disposition of candidates 	Confidential Recruiter (Supervisory), Recruiter (Supervisory), Recruiting Analyst, Recruiting Coordinator, Recruiting Sourcer, HR Administrator, Recruiting Administrator
HCM	WDHR-704	Recruiting – Candidate Selection for Central Office	2 QRGs	WBT	<ul style="list-style-type: none"> -propose compensation for offer -perform reference check and background check -hire candidate 	Confidential Recruiter (Supervisory), Recruiter (Supervisory), Recruiting Analyst, Recruiting Coordinator, Recruiting Sourcer, HR Administrator, Recruiting Administrator
HCM	WDHR-706	Refer Candidate to Position	n/a	QRG	refer candidate	All
HCM	WDHR-707	Internal Recruiting	n/a	QRG	<ul style="list-style-type: none"> - 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-Q1	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	Performance Management in Workday for People Leaders	n/a	WBT	-Performance Management for Managers	Manager
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-W4	Mid year checkin	n/a	WBT	-Mid year checkin using Workday Performance Management	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 process for managers using Workday Performance Management	Manager
HCM	WDHR-804	Performance Improvement for Central Office	1 QRG	WBT	- Initiate development plan - View disciplinary actions - Review PIP	Talent Administrator, Talent Partner, Payroll Interface Partner, Payroll Partner, HR Administrator
HCM	WDHR-806	Performance Management for Central Offices	2 QRGs	WBT	-talent profiles -initiate performance reviews -set organizational goals -cascade employee goals throughout org	Manager (Based on HCM Supervisor Org),
HCM	WDHR-807	Employee Relations		WBT	-Employee relations -labor relations	HR - Employee Relations
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	<ul style="list-style-type: none"> - 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	Research Grants and Contracts Overview for Central Offices		WBT	-Overview of the Research Grants and Contracts funtionality withing Workday for central office staff	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-101-Q1	Award Record Basics for Central Office			-Basics of recording awards in Workday for central office staff	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-101-Q2	Adding Award Lines - Peer Action Request			-How to add award lines using peer action requests in Workday for central office staff	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager

R&G	WDRG-101-Q5	Facilities and Administrative Costs		WBT	Facilities and Administrative Cost calculations in Workday for central office staff	Award Billing Specialist, Award Contract Analyst, Award Contract Analyst (Company), Award Contract Specialist, Lead Principal Investigator, Principal Investigator, Sponsored Program Manager
R&G	WDRG-101-Q10	Amending Awards (Central Office)			Amending awards in Workday for central office staff	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 Grants and Contract Basics		VILT	Research Grants and Cotract 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-102-Q1	Creating and Amending Research Award Budgets		SIM	Creating and amending research award budgets in Workday for department users	
R&G	WDRG-102-Q2	Managing Award Tasks		SIM	Managing award tasks in Workday for department users	
R&G	WDRG-102-Q3	Review and Approve Subaward (Supplier) Invoice		SIM	Reviewing and approving subaward (supplier) invoice in Workday for department users	
R&G	WDRG-103	Effort Certification	2 QRGs	WBT	Effort Certification in Workday	Grant Manger (Are these roles?: Effort certification manager, Effort certification reviewer)

R&G	WDRG-104	Reporting for Research & Grants		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	Manage Research Grant and Contract Expenses		vILT	How to manage research grant and contract expenses using Workday for department users	Departmental Accountant Level 2, Departmental Accountant Level 1, Report Writer
R&G	WDRG-107	Peer- COEUS-Workday Integration			Overview of Peer - Coeus - and Workday integrations	OCM
SCM	WDSC-101	Workday Supply Chain Overview	n/a	WBT	<ul style="list-style-type: none"> - key functionality and benefits of Workday SCM - key change impacts from transition to Workday - Navigate within Workday - key SCM processes <ul style="list-style-type: none"> • Accounts Payable • Contract Management • Inventory Management • Logistics & Distribution • Master Data Management • Procurement Expense reports 	All SCM roles
SCM	WDSC-102	Reporting for Supply Chain	n/a	QRG	Crosswalk of Legacy PO and Invoice reports to Workday reports	Inventory Specialist, VUMC Item Master, Procurement Administrator, Buyer, Procurement Administrator
SCM	WDSC-201	Contract Management	1 QRG	vILT	<ul style="list-style-type: none"> -overview of contract management process -create and edit vendor contracts 	Contract Administrator, Supplier contract specialist, Supplier Contract Specialist Manager

SCM	WDSC-202	Supplier Master	1 QRG	WBT	request a new supplier	
SCM	WDSC-203	Supplier Master for Central Office	2 QRGs	WBT	-create supplier -maintain supplier	Supplier Contract Specialist Manager, Procurement Administrator, Contract Administrator, Supplier Contract Specialist, Procurement Administrator
SCM	WDSC-204	Item Master Data Management	2 QRGs	WBT	-overview of item master attributes -update item master -add new items	Supplier Contract Specialist Manager, Procurement Administrator, Contract Administrator, Supplier Contract Specialist, Procurement Administrator, VUMC Item Master, Internal Service Data Entry Specialist, Inventory Specialist
SCM	WDSC-301	Inventory Management - Replenishment, Storage & Movement	3 QRGs	WBT	-overview of inventory -manage inventory storage -manage inventory movement -manage in-transit/transfers of inventory -update inventory value -measure inventory accuracy	Inventory Specialist, Inventory Analyst, Inventory Cost Analyst, Inventory Administrator, Inventory Accountant
SCM	WDSC-302	Inventory Management - Cycle and Physical Counts	3 QRGs	WBT	-run inventory report -perform cycle count -perform annual physical count	Inventory Specialist, Inventory Analyst, Inventory Cost Analyst, Inventory Administrator, Inventory Accountant
SCM	WDSC-303	Inventory Management - Replenish Warehouses and Storerooms	n/a	vILT	- Define Inventory Details - Overview of Replenishment Process - Replenish Inventory Sites	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	WDCS-502	Procurement	2 QRGs	vILT	<ul style="list-style-type: none"> -overview of purchase order process -approve po's -issue PO -modify/cancel PO -create return order to supplier 	VUMC Item Master, Procurement Administrator, Buyer, Services Coordinator, Procurement Administrator
SCM	WDCS-503	Receiving	4 QRGs	vILT	<ul style="list-style-type: none"> -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	WDCS-601	Accounts Payable	1 QRGs	vILT	<ul style="list-style-type: none"> -invoice processing with PO -invoice processing without PO -overview of AP aging process 	Supplier Contract Specialist, Buyer, Services Coordinator
SCM	WDCS-601-Q1	Invoice Processing	1 QRGs	SIM	<ul style="list-style-type: none"> -invoice processing with PO -invoice processing without PO -overview of AP aging process 	Supplier Contract Specialist, Buyer, Services Coordinator
SCM	WDCS-601-Q3	Supplier Invoice Request	n/a	SIM	<ul style="list-style-type: none"> -supplier invoice request 	All
SCM	WDCS-602	Payment Processing for Central Office	1 QRG	vILT	<ul style="list-style-type: none"> - Invoice Payments to Suppliers - Payments to Subject Participants - Process Patient Insurance Refunds - VOID, Cancellations, Rejections - Process Check Requests-REMOVE - Facilitation of patient refunds through Epic - Pav Credit Cards-Need more detail 	Procurement Settlement Specialist,
SCM	WDCS-603	Settlement Processing		QRG		Accounts payable settlement specialist, payroll settlement specialist, expense settlement specialist, procurement settlement specialist, expense advance repayment specialist

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
SCM	WDSC-607	Expense Reporting for Central Office	n/a	QRG	<ul style="list-style-type: none"> -create expense report for terminated employee 	Expense Administrators

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