Workday Education

We are dedicated to providing training that is relevant, comprehensive, timely, and cost-effective. Our goal is to maximize the return on investment (ROI) and adoption of Workday by delivering training that prepares your organization and your workforce to successfully deploy and use Workday products. With Workday Education, you can:

- Successfully plan for your Workday deployment.
- Take advantage of flexible training options, including classroom and virtual options.
- Keep up-to-date on new features.
- Ensure a successful rollout of Workday to managers and end users with pre-packaged rollout kits.

How This Catalog is Organized

The Workday Education Training Catalog is organized alphabetically by the specific training option as noted in the section below.

Training Options

- **Adoption Kit**: The Adoption Kit is a collection of templates and resources designed to support and accelerate end-user training and the Workday rollout. It includes a combination of hosted or downloadable videos and job aids, as well as facilitation and marketing materials. All content can be downloaded and tailored to your needs, or used as-is. Click here to learn more about the Adoption Kit.

- **Enablement Workshop**: For customers live on Workday, we deliver in-person, consultant-led training, including demonstrations, lecture, and activities. As an added bonus, our consultants coach you through hands-on configuration in your own sandbox tenant.

- **Learn In-Person**: Workday provides comprehensive instructor-led, in-classroom training to prepare students to meet their job requirements. Our classes combine lectures, social learning, product demonstrations, and hands-on activities.

- **Learn Independent**: This learning experience combines videos, interactive exercises, reading, and knowledge checks into a comprehensive online learning curriculum that students can complete at their own pace. Learn Independent enables our customers to be more self-sufficient.

- **Learn On-Demand**: Learn On Demand training provides short, targeted self-paced eLearning courses covering specific Workday concepts and configuration tasks. The Learn On-Demand content is continually updated to provide just-in-time training on core Workday concepts and tasks.

- **Learn Virtual**: Our virtual classroom offers the advantages of Workday's live instructors without the expense and time associated with travel. Students connect to our training environment and participate remotely via the Internet, complete hands-on activities, and interact with instructors and other students.
Training Audience Descriptions

- **Executive:** I am responsible for providing strategic vision for a function (HR, finance, etc.), setting policy for my organization, and prioritizing or making organization-wide decisions. I need training that will provide me with a useful context for each functional area so I may influence and make informed decisions with regards to design, configuration and workflow.

- **Generalist:** I am responsible for executing frequent, and often critical, tasks in Workday as a functional user area (i.e. payroll, finance, compensation, talent), using a wide variety of Workday features and business processes. My responsibilities may include supporting other managers and employees who may use Workday less frequently. I am responsible for consistently executing a variety of Workday tasks in my functional area with a high degree of precision and expertise, running reports and analyzing Workday data for my functional area. I need training that may be both broad and deep, with high-level overviews of the Workday system, details on how the different features function and work together, and specifics on process and task completion including reporting and analytics.

- **IT:** I am responsible for integrations, technical infrastructure, or other technical solutions related to our use of Workday. I may also guide ongoing collaboration between functional Workday team projects and IT projects, corporate applications, infrastructure and technical teams, and ensuring corporate technical standards are continually aligned with Workday requirements. I need training that will guide me on configuration and general integration options that will work successfully between my organization’s infrastructure and Workday.

- **Lead:** I am responsible for making decisions about my organization’s setup and configuration of business processes or workflows, calculated fields, etc. I need training that will help me make and implement configuration decisions in Workday. I need to understand both the big picture of my functional area and how to dive deeper into each component to configure the system for the initial launch.

- **Managers and Employees:** I am responsible for using Workday to keep my own personal information up to date. If I manage others or am a manager of a budget/cost center, location/geography, or group of employees, I am responsible for using Workday to complete tasks in support of my management responsibilities, including but not limited to approving time off, updating team and job changes, assessing performance, and progressing a wide range of business process activities. I need training that will show me how to perform tasks in the system, such as how to request/approve time off, update my personal information, and if applicable, how to update team and job changes, assess performance, etc.

- **Project Managers:** I am responsible for significant planning and execution activities related to configuration, reporting, testing, and change management for Workday project team, continually assessing feature options and innovation in Workday’s Roadmap that addresses our business needs. I need training that will prepare the project team for a successful deployment, including how to successfully navigate and leverage available resources from Workday. Additionally, I will need to understand what features and functions Workday will include with each release in order to make informed decisions and recommendations.

- **Security:** I am responsible for Workday security policies and groups, managing and testing configuration and related changes, which may include designing business processes or workflows, and/or maintaining one or more areas of the Customer’s workday tenant based on security policies. I need training that will guide me on configuration options for both functional areas and company-wide considerations.

- **System Administrator:** I am responsible for the ongoing configuration of one or more areas of my organization’s Workday solution typically based on design decisions made by functional leadership my organization, which may include designing business processes or workflows, creating reports and calculated fields, and/or maintaining one or more areas of Workday. I need both process and task-based training that will show me how to perform my administrative tasks for my functional area.

How to Contact Us

- We are committed to your success and regularly update our offerings to provide you with the latest training on Workday functionality. Please visit the Workday Community for up-to-the-minute news and information about Workday Education offerings.

- Customer Training Coordinators can submit a training case to get more information about our offerings. Please review the FAQ page on logging a training support case: Click here see how to request training support.  

- Training is only available to Workday customers. If you would like more information on Workday, please contact Sales.
Building Payroll Reports and Dashboards Enablement Workshop

**Delivery Mode:** Enablement Workshop

**Audience:** Business User, Functional Lead, Workday Administrator, and Managers and Employees

**Prerequisites:** (Report Writer) OR (Report Writer - Learn Independent)

**Library:**

**Description:**
This two-day, hands-on interactive workshop consists of education, demonstrations, and activities covering Advanced Reporting & Analytic functionality in Workday centered around Payroll Reports and Dashboards. Payroll reports covered will be Pay Balance Summary, Pay Calculation Results For Worker and Summary, Pay Register Summary, YTD Payroll Totals (Employer Paid) For Workers and Custom Pay Registers, among others. We will also look at the Pay Cycle Command Center and the Pay Dashboard. You will know by the end of the workshop how to modify these dashboards and reports to meet your organization’s requirements. We will also discuss recommended configurations, and you will be assisted by Workday consultants to build your own reports in your customer sandbox tenant.

**Required prerequisite courses:** Report Writer and Payroll Reports and Dashboards Learn Independent.

**This workshop is for customers who:**
- Are live on Workday Payroll in a production environment (not for in the initial implementation phase).
- Are Report Writers.
- Have a solid understanding of Workday configuration, data sources, report writing, and security.

**Covered Topics**
- Analyzing Payroll Results and Payroll Result Lines in the tenant
- Delivered Payroll Dashboards and Reports
- Scheduling and bursting reports and report groups
- Customizing delivered reports for deeper insights
- Deep dive into Payroll Registers and how to customize them
- Tips and tricks to effectively and efficiently report on your company’s payroll

**Please note:** Payroll Reports and Dashboards Learn Independent course will only be available for registration in March.

You may also register for the adjacent workshop ‘Composite Reporting for HCM’ that will take place prior to this workshop.

**Logistics**
- Given the limited number of seats available, these events are limited to customers (2 seats per customer).
- **Attendees will need to bring their own laptop.** Internet access will be available to allow you to access your tenant.
- Due to the hands-on nature of the workshop, sessions will not be recorded and no dial-in will be offered.
- Consulting assistance provided during the workshop is for that session only. If additional consulting is needed, please log a case with Workday Support and we’ll put together a SOW for resources and associated costs, as well as locate consulting resources for you.
- During this course, attendees will log in to their organization’s sandbox tenant (containing a copy of production data) in the presence of the instructor(s) and other Workday customers. It is each attendee’s responsibility to ensure that such participation in a group setting is permitted by their organization and that they have the appropriate security access to configure this functionality. We will provide specific security directions by email after you register for this workshop.
Are you live on Workday Financial Management and want to take advantage of Composite Reporting? Would you like focused support, knowledge, and coaching to get you going? In this in-person, three-day, interactive workshop, you will receive consultative configuration guidance (in YOUR tenant!) on Composite Reporting for Financials in addition to education, demonstrations, and hands-on report building activities. Composite Reporting is shaking things up everywhere, especially in the world of financial managers and analysts and all those that are tied to the infamous "binders" of data and spreadsheets. Though our Composite Reporting feature was driven by financial reporting requirements, it’s a foundational reporting tool and can be used by all Workday applications.

**Covered Topics**
- Composite Reporting Overview
- Sub Reports and Data Sources
- Configurable Columns, Rows, and Cells
- Multiple Data Sources
- Column, Row and Cell Calculations
- Repeating Column Groups
- Lookup Date Roll-Up
- Styles, Headings, and Analytic Indicators
- Hierarchies and Outlining
- Multiple Control Field Columns

**Reporting and Analytics**
- Learn purpose and design of Composite Reporting feature
- Apply recommended configuration examples to your organizations' reporting
- Complete the build of one or more composite reports in your own sandbox tenant
- Our workshops are for LIVE customers only

**Required Prerequisites:** None

**Recommended Prerequisites**
A strong understanding of your company's current and proposed Financial Reporting needs. This workshop is geared towards experienced users of the Workday system and a basic understanding of Workday configuration, business processes, security, and reporting is expected of attendees. This workshop is for customers live on Financials in a production environment.

**Logistics**
Given the number of seats available - these events are limited to customers (2 seats per customer) and partners directly representing customers.

- **Attendees need to bring their own laptop.**
- Internet access will be available to allow you access your sandbox.
- Due to the hands on nature of the workshop the sessions will not be recorded and no dial in will be offered.
- Consulting assistance provided are for that session only. If additional consulting is needed please log a case with Workday Support, and we'll put together a SOW for resources and associated costs and located consulting resources for you.
- Attendees will log-in to their organization's sandbox tenant (containing a copy of production data) in the presence of the instructor(s) and other Workday customers. It is each attendee's responsibility to ensure that such participation in a group setting is permitted by their organization and that they have the appropriate security access to configure this functionality.
- These workshops are focused on production customers and not intended for customers who are in the implementation phase.

**PLEASE NOTE:** You are not registered until your request indicates "Registered." "Approved" is not registered status, and you must complete the process.

**Email Confirmation** will be sent out when the minimum workshop attendance has been reached.
Composite Reporting for HCM Enablement Workshop

Delivery Mode: Enablement Workshop
Audience: Business User, Functional Lead, Workday Administrator, and Managers and Employees
Prerequisites: (Report Writer) OR (Report Writer - Learn Independent)

Library:
Description:
This two-day, hands-on interactive workshop consists of education, demonstrations, and activities covering Advanced Reporting & Analytic functionality in Workday centered around Composite Reporting for HCM. We will explore some of the most common HCM opportunities for Composite Reporting. Composite functions covered will include joining multiple data sources, how to setup rows for outlines and organization hierarchies, configuring columns for repeating column groups, analytic indicators, building charts in composites and much more. We will also discuss tips and ideas on how to set up your sub-reports, prompt sets, and overall composite reports that focus on maintenance and performance. Recommended configurations will be provided, and you will be assisted by Workday consultants to build your own reports in your sandbox tenant!

Please note the required prerequisite course: Report Writer.
This workshop is for customers who:
⦁ Are live on Workday HCM in a production environment (not for in the initial implementation phase).
⦁ Are Report Writers.
⦁ Have a solid understanding of Workday configuration, data sources, report writing, and security.

Covered Topics:
⦁ Overview of When to Use Composite Reporting
⦁ Building Sub-reports and Data Source Selection Considerations
⦁ Exploring how to build Composite Reports with Multiple Data Sources
⦁ Configuring Columns, Rows, and Cells with Styles, Headings, and Analytic Indicators
⦁ Using Calculations to provide Aggregations and Comparisons of Metric Data
⦁ Utilizing Hierarchies and Outlining to Enhance Data Accessibility
⦁ Using Lookup Data Rows and Dynamic Data Rows to Create Unique and Powerful Row Level Groupings of Data
⦁ How and When to Use Repeating Column Groups to Simplify Your Composite Reports Across Multiple Columns (Time Periods, Bonus Plans, Benefits Groups, etc.)

Logistics
⦁ Given the limited number of seats available, these events are limited to customers (2 seats per customer) and partners directly representing customers.
⦁ Attendees will need to bring their own laptop. Internet access will be available to allow you to access your sandbox.
⦁ Due to the hands-on nature of the workshop, the sessions will not be recorded and no dial-in will be offered.
⦁ Consulting assistance provided during the workshop is for that session only. If additional consulting is needed, please log a case with Workday Support and we’ll put together a SOW for resources and associated costs, as well as locate consulting resources for you.
⦁ During this course, attendees will log in to their organization’s sandbox tenant (containing a copy of production data) in the presence of the instructor(s) and other Workday customers. It is each attendee’s responsibility to ensure that such participation in a group setting is permitted by their organization and that they have the appropriate security access to configure this functionality. We will provide specific security directions by email after you register for this workshop.
Creating Merit Statement with BIRT - Enablement Workshop

Delivery Mode: Enablement Workshop

Audience: Functional Lead, Workday Administrator, and Managers and Employees

Prerequisites: Workday Report Designer (BIRT)

Description:
Are you live on Workday and want help creating or updating your merit statement using Report Designer (BIRT)? This virtual, interactive workshop consists of education, demonstrations, and hands-on activities covering Merit Statements within Workday and Report Designer (BIRT). You will learn the skills and tools needed to create your own custom merit statement as well as tips and tricks for updating existing merit statements for the changing needs of your organization.

This workshop is intended for customers who:

⦁ Are live on Workday in a production environment. Not intended for customers in the initial implementation phase.
⦁ Are experienced Workday Report Users.
⦁ Have a solid understanding of your company's compensation process.
⦁ Have a basic understanding of Workday Studio Report Designer and security.

Covered Topics

⦁ Merit Statements and Merit Process
⦁ Merit Data Sources and Reporting
⦁ How to Create or Update a Merit Statement
⦁ Tips and Tricks for Testing Your Merit Statement
⦁ Merit Statement Delivery and Security

Out of scope: Functional Advanced Compensation Configuration

This workshops consists of 2 parts:

1. Virtual Workshop: On day 1, you will join a Zoom call scheduled by Workday Consultants for a 4-hour interactive session dedicated to educating attendees on the merit statement process and providing demonstrations of the necessary steps to create a merit statement as well as troubleshooting activities. You will explore concepts critical to understanding Report Designer (BIRT) as well as common issues and maintenance concerns. This will be the only day of instruction.

2. One-on-One Office Hours Appointment: You will join a 2-hour video call with your assigned consultant to address your unique merit statement questions and concerns. Leveraging your sandbox tenant, this appointment will guide you while you are hands on to resolve questions and issues you are currently facing.

It must occur on day 3 or 4 following day 1 above, and cannot be rescheduled beyond those days (day 2 is a free day with no instruction or appointments). Please consider this in your planning and scheduling when choosing to enroll in this workshop.

Due to the unique workshop structure, we are limiting the engagement to 12 customers with a maximum of 2 registered participants per customer.

Before the workshop, and after you are registered, you will receive a link to a private Community page where you will be able to engage pre-workshop and review materials.

Audience

⦁ Workday Administrators who can configure merit features within the tenant.
⦁ IT Professionals who are responsible for integrations and technical infrastructure.
⦁ Leads who are responsible for decisions in functional areas and workflows for merit.

Required Prerequisites

⦁ Workday Report Designer (BIRT)
⦁ A completed Compensation Review Process in a non-Production Tenant

Learning Objectives:

Create merit statement with BIRT
Enablement Workshop

HCM Analytics and Dashboards Enablement Workshop

Delivery Mode: Enablement Workshop
Audience: Integration Lead and Workday Administrator
Prerequisites: (Report Writer) OR (Report Writer - Learn Independent)

Library:

Description:
This two-day, hands-on interactive workshop consists of education, demonstrations, and activities covering Advanced Reporting & Analytic functionality in Workday. You will learn the purpose and design of the features, recommended configurations, and be assisted by Workday consultants to build your own reports and dashboards in your customer sandbox tenant.

Please note the prerequisite course: Report Writer.

This workshop is for customers who
⦁ Are live on Workday in a production environment (not for customers in the initial implementation phase).
⦁ Are Report Writers.
⦁ Have a solid understanding of Workday configuration, data sources, report writing and security.

Covered Topics
⦁ Report Performance Optimization including Standard vs. Indexed Data Sources
⦁ Trended Workers
⦁ Report Types: Matrix and Trending
⦁ Analytic Indicators
⦁ Worklets & Dashboards
⦁ Report Prompts
⦁ Embedded Analytics in Business Process
⦁ Configuring Alerts

Required Prerequisites: Report Writer.

Logistics
⦁ Given the limited number of seats available, these events are limited to customers (2 seats per customer) and partners directly representing customers.
⦁ Attendees will need to bring their own laptop. Internet access will be available to allow you to access your sandbox.
⦁ Due to the hands on nature of the workshop the sessions will not be recorded and no dial in will be offered.
⦁ Consulting assistance provided during the sessions are for that session only. If additional consulting is needed, please log a case with Workday Support and we’ll put together a SOW for resources and associated costs and locate consulting resources for you.
⦁ During this course, attendees will log-in to their organization’s sandbox tenant (containing a copy of production data) in the presence of the instructor(s) and other Workday customers. It is each attendee’s responsibility to ensure that such participation in a group setting is permitted by their organization and that they have the appropriate security access to configure this functionality. We will provide specific security directions by email after you register for this workshop.
Enablement Workshop

Integrations Maintenance Virtual Enablement Workshop

Delivery Mode: Enablement Workshop

Audience: Functional Lead and Workday Administrator

Prerequisites: Workday Integration System Fundamentals Enrollment Curriculum

Description:
Are you live on Workday and want help understanding how to maintain and update your integrations?
This virtual, interactive workshop consists of education, demonstrations, and hands-on activities covering Integration Administration within Workday. You will learn the skills and tools of the trade to administer day-to-day integration activity as well as tips and tricks for updating your integrations to fit the changing needs of your organization. The workshop includes a hand-on activity where participants will build an integration dashboard in their own tenant to visualize the status of their integrations.

Covered Topics:
⦁ Decoding and Prioritizing Errors and Warning
⦁ Building an Integration Dashboard
⦁ Updating Integrations to Address Business Changes
⦁ Best Practices for Testing Updates
⦁ Tips and Tricks on Updating Integrations in Production

This workshops consists of 2 parts:

1. Virtual Workshop:
On day 1, you will join a Zoom call with Workday Customer Enablement Consultants for a 4-hour interactive session dedicated to educating attendees on key integration concepts and providing demonstrations of key integration administration and troubleshooting activities. You will explore concepts critical to understanding Workday’s integration architecture as well as common issues and maintenance concerns. This will be the only day of instruction.

2. One-on-One Office Hours Appointment:
You will join a 2 hour video call with your assigned Workday consultant to address your unique Integrations questions and concerns. Leveraging your sandbox tenant, this appointment will provide hands on support to resolve questions and issues you are currently facing.

• It must occur on day 3 or 4 following day 1 above, and cannot be rescheduled beyond those days (day 2 is a free day with no instruction or appointments). Please consider this in your planning and scheduling when choosing to enroll in this workshop.
• To maximize your experience during this appointment, a consultant will contact you 1 week prior to the workshop start to gather your desired discussion items before the appointment. Providing the information in advance will allow the consultants to optimally prepare for the appointment. Because of the unique workshop structure, we are limiting the engagement to 12 customers with a maximum of 2 registered participants per customer. Before the Workshop, and after you are registered in the LMS, you will receive a link to a private Community page where you can:
  • Review items provided prior to the workshop start including the agenda, presentation deck, and links to other Community resources.
  • Participate in pre-workshop Q&A.
  • Access the post-workshop recorded Day 1 session for ongoing reference.
  • Participate in post-workshop Q&A for 30 days.

Audience: Workday System Administrators who can configure integration features within the tenant. IT Professionals who are responsible for integrations and technical infrastructure. Leads who are responsible for decisions in functional areas and workflows containing integrations.

Prerequisites:
A solid understanding of your company's integration landscape is strongly recommended. This workshop is geared towards experienced users of the Workday system and a basic understanding of Workday configuration, integration technology and security is expected of attendees. This workshop is for customers that are "live" with Workday and is not intended for customers in the initial implementation phase.

Required Pre-requisites:
Report Writer class (either Learn Virtual or Learn Independent) and The Workday Integration System Fundamentals - Learn Virtual.
Enabled Workshop - Enablement Workshop

**Delivery Mode:** Enablement Workshop

**Audience:** Functional Lead and Workday Administrator

**Prerequisites:** (Benefits Fundamentals) OR (Open Enrollment - Learn Independent) OR (Open Enrollment - Learn Independent Curriculum)

**Library:**

**Description:**
Are you live on Workday and launching Open Enrollment for the first time?

If you answered yes, then this in-person, 3-day, hands-on, interactive workshop is for you!! It will consist of education and demonstrations covering Open Enrollment functionality within Workday. You will learn the purpose and design of the features, recommended configurations, and be assisted by Workday consultants to begin configuring in your own sandbox tenant – everything you need to ensure a successful Open Enrollment within your organization!

**Covered Topics**

- How to prepare for your Open Enrollment
- Recommended approaches for running a smooth open enrollment
- Reviewing configuration requirements including: Groups, Eligibility Rules, Providers, Benefit Coverage Types, Benefit Plans, Coverage Targets, Benefit Plan Year, Cross Plan Rules, Enrollment Events, Enrollment Event Rules, etc.
- Open Enrollment business process
- Open Enrollment Reporting
- Security for processing Open Enrollment
- Optimize End-user Experience
- Benefits Roadmap

**Required Prerequisites:** Open Enrollment – Learn Independent or Benefit Fundamentals

A thorough understanding of your company's current benefits and open enrollment processes and how you will use Open Enrollment in your organization. This workshop is for experienced users of the Workday system with an understanding of Workday Benefits configuration, business processes, and security is expected of attendees. The workshop focuses on open enrollment and not basic benefits configuration.

**Audience:** Benefit Partners, Benefits Administrators, Workday Administrators, HRIS Team Members

This workshop is for customers that are “live” with Workday and is not intended for customers in the initial implementation phase.

**Attend**

- Investment: $2100 USD per participant or 3 training credits. (Cost does not include any prerequisites; they are additional training credits

*Please note: The order in which you register in the LMS is important. Please see below.

Here’s how to register:

- Log-in to LMS:

  This curriculum will guide to how to register for Open Enrollment - Learn Independent before you are able to register for the Open Enrollment Enablement Workshop.

**Logistics:**

- Given the limited number of seats available, these events are limited to customers (2 seats per customer) and partners directly representing customers.
- Internet access will be available to allow you to access your sandbox
- Due to the hands-on nature of the workshop, the sessions will not recorded and no dial in capability will be offered.
- Consulting assistance provided during the sessions is for that session only. If additional consulting is needed, please log a case with Workday Support, and we'll put together a SOW for resources and associated costs and locate consulting resources for you
- You will be log-in to your organization's sandbox tenant (which is a copy of production data) in the presence of the instructor(s) and other Workday customers. It is each attendee's responsibility to ensure that such participation in a group setting is permitted by their organization and that they have the appropriate security access to configure this functionality.

**PLEASE NOTE: You are not registered until your request indicates "Registered." "Approved" is not registered status, and you must complete the registration process.**

Final Email Confirmation will be sent out when the minimum workshop attendance has been reached.

**Learning Objectives:**
# Open Enrollment Refresher - Virtual Enablement Workshop

**Delivery Mode:** Enablement Workshop  
**Audience:** Functional Lead, Workday Administrator, and Managers and Employees  
**Prerequisites:** (Benefits Fundamentals) OR (Open Enrollment - Learn Independent Curriculum)  

## Description:

**Are you live on Workday Benefits?** Have you already launched Open Enrollment one or more times and want a refresher on reviewing configuration requirements such as Groups, Eligibility Rules, Benefit Plans and Rate Changes? Do you need guidance on how to configure your Benefit Plan Year, Enrollment Event Rules, Benefit Credits or Cross Plan Dependencies? Would you like guidance how to successfully launch your Open Enrollment?

If you answered yes to any of these questions, then this interactive, virtual workshop is for you!

This workshop consists of 2 parts:

1. **Virtual Workshop:** On day 1, you will join a Zoom call with Workday Customer Enablement Consultants for a 4-hour interactive session dedicated to covering the topics of Open Enrollment. This will be the only day of instruction.

2. **One-on-One Office Hours Appointment:** You will join a 2-hour video call with your assigned Workday consultant as you configure Open Enrollment in your own sandbox tenant. This appointment will provide direction with specific configuration questions you may have and guidance on how to configure Open Enrollment.

   - You will be assigned an appointment on day 3 or 4 following day 1 above, and it cannot be rescheduled beyond those days. Please consider this in your planning and scheduling when choosing to enroll in this workshop.
   - To maximize your experience during this appointment, a consultant will contact you 1 week prior to the workshop start to gather your desired discussion items before the appointment. Providing this in advance will allow the consultants to optimally prepare for the appointment.
   - Any questions from day 1 can be addressed during your appointment.
   - Consultants will not be configuring within your tenant, but guidance will be provided as to how to configure Open Enrollment.

Because of the unique workshop structure, we are limiting the engagement to twelve (12) unique customers with a maximum of two (2) registered participants per customer.

**2 weeks before the Workshop,** and after you are registered in the LMS, you will receive a link to a private Community page where you can:

- Review items prior to the workshop start - agenda, configuration checklist, presentation, and links to other Community resources.
- Ask any questions you may have prior to the workshop start. This allows consultants and other participants provide answers or review what topics may need additional coverage during class.
- Day 1 session will be recorded and available on this page.
- Group will stay open for 30 days after the Workshop to ask questions as you go through testing new features and access the recording and other resources Workday provides for the class.

**Audience**

Benefit Partners, Benefit Administrators, Workday Administrators, HRIS Team Members

**Required Prerequisites**

Open Enrollment – Learn Independent or Benefit Fundamentals.

A thorough understanding of your company current benefits and Open Enrollment processes and how you will use Open Enrollment in your organization. This workshop is for experienced users of the Workday system with an understanding of Workday Benefits configuration, business processes, and security is expected of attendees. The workshop focuses on open enrollment and not basic benefits configuration.

Please note that if you are not familiar with Open Enrollment and have never launched it before, an in-person 3 day workshop is available. It will cover everything you need to ensure a successful Open Enrollment within your organization. Learn more about it here.

**PLEASE NOTE:** You are not registered until your request indicates **"Registered."** **"Approved"** is not registered status, and you must complete the process.**
Recruiting Analytics and Dashboards Enablement Workshop

Delivery Mode: Enablement Workshop
Audience: Functional Lead and Workday Administrator
Prerequisites: (Report Writer) OR (Report Writer - Learn Independent)

This one-day, hands-on interactive workshop consists of education, demonstrations, and activities covering Advanced Reporting & Analytic functionality in Workday centered around Recruiting metrics and Dashboards. Recruiting metrics covered will be Time to Fill, Requisition Aging, Source Effectiveness, and Candidate Diversity, among others. We will discuss recommended configurations, and you will be assisted by Workday consultants to build your own reports in your customer sandbox tenant.

Please note the prerequisite course: Report Writer.

This workshop is for customers who

- Are live on Workday Recruiting in a production environment (not for customers in the initial implementation phase).
- Are Report Writers.
- Have a solid understanding of Workday configuration, data sources, report writing and security.

Covered Topics

- Configuring the Tenant to report on Time to Fill
- Delivered Recruiting Dashboards and Reports
- Adding reports to the Requisition view
- Customizing delivered metrics for deeper insights

Required Prerequisites

- Report Writer.

Logistics

- Given the limited number of seats available, these events are limited to customers (2 seats per customer).
- Attendees will need to bring their own laptop. Internet access will be available to allow you to access your sandbox.
- Due to the hands-on nature of the workshop the sessions will not be recorded and no dial in will be offered.
- Consulting assistance provided during the sessions are for that session only. If additional consulting is needed, please log a case with Workday Support and we’ll put together a SOW for resources and associated costs and locate consulting resources for you.
- During this course, attendees will log-in to their organization’s sandbox tenant (containing a copy of production data) in the presence of the instructor(s) and other Workday customers. It is each attendee’s responsibility to ensure that such participation in a group setting is permitted by their organization and that they have the appropriate security access to configure this functionality. We will provide specific security directions by email after you register for this workshop.
Recruiting Enhancements Virtual Enablement Workshop

Delivery Mode: Enablement Workshop
Audience: Workday Administrator

Prerequisites:

Description:

Are you live on Workday Recruiting and want to be current with updates with the latest releases? In this interactive, virtual workshop, we will take a deep dive into some of the highest impact Recruiting features from the last 2 Workday releases which will include the topics below. You will be able to make informed adoption decisions and understand configuration steps, considerations and best practices.

Because of the unique workshop structure, we are limiting the engagement to 16 unique customers with a maximum of 2 registered participants per customer.

This workshop is for customers who
⦁ Are live on Workday Recruiting in a production environment (not for customers in the initial implementation phase).
⦁ Are Workday Administrators (Recruiting/System) who can configure features in the tenant.
⦁ Are Recruiting Process Owners who can aid in business decisions around how to use new Workday features.

Covered Topics*
⦁ Delay Notifications on Recruiting Business Processes
⦁ Autocomplete Hire from Recruiting
⦁ External Candidate Job Alerts
⦁ Duplicate Candidate Merge Enhancements
⦁ Legal and Preferred Names
⦁ Career Site Enhancements, including Candidate Information Delete, Privacy Policy, and Multiple Tracking Pixels
⦁ Offers for Evergreen Requisitions
⦁ Candidate Self-Schedule
⦁ Configure Hidden & Required Fields
⦁ Evergreen and Job Requisition Rules
⦁ Branching Questionnaires
⦁ Automatic Stage Routing

*Topics listed include future functionality covered by Safe Harbor are therefore subject to change without notice.

Schedule

Part 1: Virtual Workshop
4-hour interactive Zoom session with Workday Customer Enablement consultants dedicated to topics delivered in Recruiting as part of recent feature updates. This will be the only day of instruction.

Part 2: One-on-One Office Hours Appointment: You will join a 2-hour call with your assigned Workday consultant as you configure these Recruiting features in your own sandbox tenant. This appointment will provide direction with specific configuration questions you may have, and guidance on how to configure new features.

1. You will be assigned appointment time on day 3 or 4 following day 1 of virtual workshop above, and cannot reschedule beyond those days (day 2 is a free day with no instruction or appointments). Please consider this in your planning and scheduling when choosing to enroll in this workshop.
2. To maximize your experience during this appointment, a consultant will contact you 1 week prior to the workshop start to gather your desired discussion items before the appointment. Providing information in advance will allow the consultants to prepare for the appointment.
3. Any questions from day 1 can be addressed during your appointment.
4. Consultants will not be configuring within your tenant, but guidance will be provided as to how to configure recruiting features and security.

After you are registered in the Learning Management System (LMS), you will receive a link to a private Community user group where you can:
⦁ Access the pre-workshop resources: agenda, configuration checklist, and other resources.
⦁ Ask any questions before workshop starts.
⦁ Access workshop recording for reference.
⦁ Participate in post-workshop Q&A for 30 days.

Recommendations
The following resources will be valuable to you in your preparation for this workshop: Recent Recruiting Next Levels (Scroll down for Recruiting) and Workday 31 and 32 Feature Releases (Scroll down for Recruiting).

Required Prerequisites: None
**Workforce Trends Dashboard - Virtual Enablement Workshop**

**Delivery Mode:** Enablement Workshop  
**Audience:** Integration Lead, Functional Lead, and Managers and Employees  
**Prerequisites:** (Report Writer) OR (Report Writer - Learn Independent)

**Description:**

Are you live on Workday HCM and want to quickly deploy a dashboard that provides insight into your workforce and provides visibility into workforce changes over time? Would you like to understand key metrics for your organization like turnover, compensation, or span of control. Would you like guidance on how to utilize Trended Worker and get assistance building worklets and a dashboard?

If you answered yes to any of these questions, then this interactive virtual workshop is for you!

**Covered Topics**

- Trended Worker Overview, Set-Up, and Security
- Building Reports and Worklets for Trended Worker Data
- Configuring a Trended Worker Dashboard including a Prompt Set

**This virtual workshops consists of 2 parts:**

1. **Virtual Workshop** - On Day 1, you will join a Zoom call with Workday Customer Enablement Consultants for a 4-hour interactive session. Be ready to configure and build in your tenant as we walk you through all of the required steps to roll out of a Worker Trending Dashboard. This will be the only day of instruction.

2. **One-on-One Office Hours Appointment** - Your 2-hour, virtual one-on-one Office Hours appointment will occur after the Virtual Workshop. This session will be used to complete or build new Trended Worker reports, complete the dashboard configuration*, or answer any questions that arose from the Virtual Workshop. Come prepared with items to discuss with the consultant based on the Virtual Workshop items and/or other open questions. These will be scheduled on Day 3 OR 4 post day 1 and cannot be rescheduled beyond those days. Please consider this in your planning and scheduling when choosing to enroll in this workshop.

   *Please note, the consultants will not be configuring within your tenant, but guidance will be provided as to how to configure Trended Worker.*

2 weeks before E the Workshop, and after you are registered in LMS, you will receive a link to a private Community page where you can:

- Review items prior to workshop - agenda, configuration checklist, presentation, and links to other Community resources.
- Participate in pre-workshop questions.
- Ask any questions you may have prior to the start of class. This will allow for the consultants and other participants to provide answers or review what topics may need additional coverage during class.
- Day 1 recording will be posted to this group.
- This page will be available for 30 days after the Workshop to ask additional questions as you go through testing new features and access the recording and other resources Workday provides for the class.

**Audience**

Workday Report Writers

**Prerequisites**

This workshop is for customers who want to optimize their use of Workday and utilize new features to help them get there. The following training course is required in preparation for this workshop.

**Report Writer* (select one option below)**

- Report Writer - Learn Virtual
- Report Writer - Learn Independent

**PLEASE NOTE:** You are not registered until your request indicates "Registered". "Approved" is not registered status, and you must complete the process.**

The time zone for the workshop will be represented in the LMS.
**Learn In-Person**

**Absence Management: Configuration and Administration**

**Delivery Mode:** Learn In-Person  
**Audience:** Functional Lead

**Prerequisites:**

**Library:**

**Description:**
This four-day instructor-led course consists of lectures, demonstrations, and hands-on activities covering absence setup and administration. You will configure functionality and apply the core concepts of Workday Absence Management, set up time off and leave calculations using Workday's Calculation Engine and Calculated Fields, configure business processes, and administer time off and leave plans.  

**Note:** This class focuses primarily on configuring the Workday application; there is less of a focus on running absence transactions.  

**Learning Objectives:**
⦁ Define and differentiate time off plans and leave types.  
⦁ Configure a time off plan and its components.  
⦁ Design calculation engine calculations to drive time off plan functionality.  
⦁ Configure a leave type and its components.  
⦁ Define and execute basic administrative tasks.  
⦁ Configure the four business processes related to Absence Management.  
⦁ Identify and use delivered reports relating to time off and leaves of absence.  

**Required Prerequisites:** None  
**Recommended Prerequisites:** Core Concepts or HCM Fundamentals

**Important:** Although there are no specific prerequisites, this class requires a high level of technical proficiency and the ability to understand complex time off and leave calculations. It is not suitable for those who are not comfortable with basic programming logic. This should not be your very first exposure to the Workday system. This course is approved for 14 Recertification Credit Hours (RCH) with the American Payroll Association.

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**Advanced Business Process**

**Delivery Mode:** Learn Virtual  
**Audience:** Workday Administrator

**Prerequisites:**

**Library:**

**Description:**

The Advanced Business Process Curriculum is designed to package all of the training requirements within the curriculum.  

Select "Request" to add the Advanced Business Process Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements.  

**Visit the Cross Application Training Paths and Frequently Asked Questions.**

**Training Requirements:**

**Prerequisite:** Business Process Fundamentals  
**Recommended Prerequisites:** Calculated Fields

**Training Course Summary:**

**Business Process Fundamentals (1.5 Training Units)**

The Workday Business Process Framework consists of a powerful set of tools that enable you to automate business processes and deliver the right information to the right people at the right time. Through a series of demos and hands-on activities, this course will introduce you to the fundamentals of business process configuration and administration to support the successful deployment and ongoing management of business processes.

**Advanced Business Process (1 Training Unit)**

This class is intended for the Business Process lead or administrator who configures and administers business processes in any number of Workday's Solutions. In this course, you will be presented with business cases that require complex configurations and advanced capabilities. Through a series of demos and activities, you will have the opportunity to enhance and streamline business processes for a range of functional areas and learn to use a deeper knowledge of
Learn In-Person

Advanced Compensation

Delivery Mode: Learn In-Person

Audience: Functional Lead and Workday Administrator

Prerequisites: (Compensation Fundamentals) OR (HCM Fundamentals)

Library:

Description:
This three-day instructor-led course consists of lectures, demonstrations, and hands-on activities covering advanced compensation topics. You will configure functionality and apply advanced concepts including Compensation Basis, Stock, Bonus, and Merit plans.

This course is approved for 10.5 Recertification Credit Hours (RCH) with the American Payroll Association.

Covered Topics:
- Manage by Compensation Basis
- Compensation matrix, proration rules, and scorecards
- Configurable grid
- Shared participation
- Coordination of events

Required Prerequisites: Compensation Fundamentals or HCM Fundamentals

Learning Objectives:
- Configure and Manage by Compensation Basis
- Create a Compensation Matrix, a Time Proration Rule, and a Compensation Scorecard
- Create a configurable grid and run audit reports
- Create stock, bonus, and merit plans and run their associated processes
- Enable the Shared Participation Compensation Review process for stock, bonus, and merit processes
- Create and manage eligible earnings override
- Manage the Coordination of Event process
Learn In-Person

**Advanced Composite Reporting**

**Delivery Mode:** Learn Virtual

**Audience:** Integration Lead

**Prerequisites:**

**Library:**

**Description:**

The Advanced Composite Reporting Curriculum is designed to package all of the training requirements within the curriculum.

Select "Request" to add the Advanced Composite Reporting Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

**Training Requirements:**

**Prerequisites:** Report Writer and Composite Reporting Fundamentals

Recommended Prerequisites: Financials Fundamentals or HCM Fundamentals, Calculated Fields

**Training Course Summary:**

**Report Writer (1.5 Training Units)**

In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Composite Reporting Fundamentals (1.5 Training Units)**

This course is for the advanced report writer who needs to create complex custom reports involving financial reporting, HCM, and reports that blend data across Workday products. Composite reporting is a powerful tool that allows you to join Workday data. This may include joining data from multiple data sources using subreports or running the same subreport over multiple times and may be applied to financial, HCM, or blended use cases. Additionally, composite reports allow you to perform column, row, and cell calculations; apply formatting styles; filter rows with outlining by multiple business objects outlining to repeating columns. In this three-day virtual instructor-led course, you will learn the fundamentals of composite reporting and apply these concepts to create complex custom reports that blend data across Workday products.

**Advanced Composite Reporting Fundamentals (1 Training Unit)**

This course is for the advanced report writer who wants to leverage the most advanced features to composite reports that involve financial reporting, HCM, and reports that blend data across Workday products. Composite reporting provides extensive advanced functionality that will allow you to do more with your composite reports and get additional insights from your data. Building on key themes from Composite Reporting Fundamentals, this two-day virtual instructor-led course will help you build more complex composite reports. You will learn advanced functionality to make your composite reports dynamic and flexible, and build composite reports with greater reach using calculated fields in creative ways. You will explore advanced configuration options for repeating column groups, calculation columns, and dynamic data rows. You will also use a calculated field to create a period trending report. Finally, you will build conditions to define flexible formatting, styles, headers and footers, and analytic indicators.
Learn In-Person

Advanced Configurable Security

Delivery Mode: Learn Virtual
Audience: Workday Administrator
Prerequisites:
Library:
Description:

The Advanced Configurable Security Curriculum is designed to package all of the training requirements within the curriculum. Select "Request" to add the Advanced Configurable Security Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisite: Configurable Security Fundamentals
Training Course Summary:
Configurable Security Fundamentals (1 Training Unit)
Workday provides a security framework enabling you to configure access to Workday domains (predefined sets of related securable items that include reports, tasks, instance sets, report fields, and data sources) and business processes. Through a series of demos and hands-on activities, this course will introduce you to the fundamentals of security configuration and administration.

Recommended Prerequisites: It is recommended to attend the free Learn On-Demand offering, titled Organization and Security, prior to attending the Configurable Security Fundamentals course.

Advanced Configurable Security (1 Training Unit)
This course focuses on combinations of security groups. In this training, you will learn how to create Segmented, Aggregation, and Intersection security groups to allow for more flexibility in your security configuration, more targeted access to data, and ease of maintenance. You will also use Service Center security groups to configure access for third-party users. Lastly, you will learn strategies for monitoring changes to security data and tips for maintaining your security configuration over time. This training is designed for administrators with foundational knowledge of the Workday security framework.
Learn In-Person

Advanced HCM

Delivery Mode: Learn Virtual
Audience: Functional Lead, Workday Administrator, Implementer, and Internal
Prerequisites: (HCM Certification) OR (HCM Fundamentals) OR (HCM Services Core)

Library:

Description:
This three-day virtual instructor-led course will build on the knowledge gained in HCM Fundamentals to assist Workday administrators in using the more advanced features of Workday HCM. Through a series of demonstrations and hands-on activities, you will learn how to configure Workday HCM to be more efficient.

Covered Topics:
⦁ Branding and communications
⦁ Preferences, localization, and translations
⦁ HCM global considerations and regulatory reporting
⦁ Advanced staffing transactions and configurations
⦁ Workday HCM reporting best practices
⦁ Configuring and using Workday Mobile
⦁ Overview of functional areas and touchpoints

Required Prerequisites: HCM Fundamentals
Recommended Prerequisites: Business Process Fundamentals and Configurable Security

Learning Objectives:
⦁ Configure a Workday tenant to align with an organization’s existing communication and branding strategy.
⦁ Configure the Workday HCM global functionality using Workday-delivered preferences, features, and reports to meet organizational needs.
⦁ Configure and perform advanced HCM staffing transactions with cross-functional touchpoints.
⦁ Configure Workday Mobile for an organization.
⦁ Analyze and resolve common errors by following best practices and using Workday-delivered reports.
⦁ Identify common functional areas that impact Workday HCM, and analyze touchpoints to determine how the configuration of one area will impact another area.
Advanced Recruiting

Delivery Mode: Learn Virtual

Audience: Functional Lead, Workday Administrator, and Implementer

Prerequisites: Recruiting Fundamentals

Library:

Description:
This two-day, virtual instructor-led course is for recruiting administrators who want to configure and apply advanced Workday Recruiting functionality. Topics within this course build upon the foundational concepts in the Recruiting Fundamentals or Recruiting Consulting Core classes.

Topics include:
- Advanced referral functionality
- Self-scheduled interviews and Microsoft Outlook integration
- Customized offer letters
- Candidate management and advanced question functionality
- Security configurations
- Confidential candidates and job requisitions
- Recruiting agencies
- Reporting and analytics

**Required Prerequisites:** Recruiting Fundamentals or Recruiting Consulting Core

Learning Objectives:
- Perform advanced referral functionality.
- Configure self-scheduling interviews and explore additional interview management options.
- Use calculated fields to create a custom offer letter.
- Perform advanced candidate management and question functionality.
- Configure ad hoc security roles and segmented permissions.
- Create confidential job requisitions and candidates.
- Create a recruiting agency and manage an agency job requisition.
- Customize recruiting analytics.
Learn In-Person

**Advanced Reporting and Analytics**

**Delivery Mode:** Learn Virtual

**Audience:** Integration Lead

**Prerequisites:**

**Library:**

**Description:**

The Advanced Reporting and Analytics Curriculum is designed to bundle all of the training requirements within the curriculum. Select "Request" to add the Advanced Reporting and Analytics Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

**Training Requirements:**

**Prerequisites:** Report Writer and Calculated Fields

**Training Course Summary:**

**Report Writer (1.5 Training Units)**
In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Calculated Fields (1 Training Unit)**
This course explores the capabilities of calculated fields in Workday. Calculated fields support many functions that enable you to format existing data as well as derive new values. You will learn how to create calculated fields that manipulate dates and text, evaluate conditions, work with data from related objects, and perform arithmetic calculations. Through a series of demonstrations and hands-on activities, you will learn how to add calculated fields to custom reports to meet complex business requirements. Calculated fields can also be used in outbound integrations to transform Workday data based on the requirements of external systems.

**Advanced Reporting and Analytics (1.5 Training Units)**
This course focuses on building matrix reports and adding reports to custom dashboards. Dashboards provide quick access to frequently needed data and allow users to easily analyze the results. Through a series of demonstrations and hands-on activities, you will learn how to design reporting and dashboard solutions that are reusable and efficient.
Learn In-Person

Advanced Workday Studio

Delivery Mode: Learn Virtual
Audience: Functional Lead and Workday Administrator

Prerequisites:
Library:
Description:

The Advanced Workday Studio Curriculum is designed to package the training requirements within the curriculum. Select "Request" to add the Advanced Workday Studio Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisites: Report Writer, Workday Integrations System Fundamentals, Introduction to Workday Studio

Training Course Summary:
Report Writer (1.5 Training Units)
In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

Workday Integration System Fundamentals (1 Training Unit)
The Workday Integration System Fundamentals class will introduce Workday Users to tools and concepts needed to build and maintain Workday integration systems. We will introduce the different technologies used to integrate with Workday, help understand strengths and limitations of each and how to consider using certain technologies. This class will also introduce basic concepts of XML technologies and how they are using in Workday integrations. We will not build specific integrations in this class. The class is designed to prepare you to understand the Workday Integration Architecture and associated integration technologies.

Introduction to Workday Studio (1 Training Unit)
The Introduction to Workday Studio course will orient you to the Workday Studio development environment and show you how to begin working with Assemblies. Through hands-on activities and demonstrations, the course will introduce building Workday Studio Assembly projects and using Assembly Components and Steps.
Workday Studio is a unified Eclipse-based environment that allows Workday customers and third parties to develop, deploy, debug, and support their own complex integrations running in the Workday Cloud. destinations.

Advanced Workday Studio (1.5 Training Units)
Workday Studio is a unified Eclipse-based development environment that enables you to develop, deploy, debug, and support your own complex integrations running in the Workday Cloud. This three-day virtual instructor-led course is intended for developers who understand Workday Studio Assembly Projects and using Assembly Components and Steps. Additionally, in-depth knowledge of Workday Business Objects, Workday Business Processes, Workday Web Services and Workday Reporting is necessary to successfully complete this class. General experience developing using web services and XML technologies like XSLT and XSD is strongly recommended.
Benefits Fundamentals

**Delivery Mode:** Learn In-Person  
**Audience:** Functional Lead and Workday Administrator  
**Prerequisites:**

**Library:**

**Description:**
Through presentations, demonstrations, and hands-on activities, this four-day instructor-led course provides an overview of Workday Benefits with in-depth coverage of Benefits configuration, maintenance, and processing.

**Covered Topics:**
- Core benefits configuration (groups, plans, rates, etc.)
- Benefit events setup
- Enrollment event processing
- Passive events
- Evidence of insurability
- Open enrollment

**Recommended Prerequisites:** Workday Core Concepts or HCM Fundamentals

**ATTENTION:** This is an advanced topic course and assumes you have fundamental knowledge of Workday HCM. It is NOT recommended to take this as an introduction to Workday.

This course has some sessions with the option to attend remotely in our Hybrid classroom. In order to participate remotely, the following is **required:**
- Zoom software downloaded on your computer
- Course materials are provided as eBooks only, hosted by VitalSource
- A working webcam, which must be on for the entire session

This course is approved for 14 Recertification Credit Hours (RCH) with the American Payroll Association.

**Learning Objectives:**
- Configure the core components of Workday Benefits, such as providers and coverage types.
- Define and configure benefit groups, eligibility criteria, and plans.
- Configure and execute common enrollment event types.
- Perform common administrative tasks.

Benefits Transactions

**Delivery Mode:** Learn Virtual  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:**

**Library:**

**Description:**
Through presentations, demonstrations and hands-on activities this two day virtual instructor-led course provides an overview of Workday Benefits with in depth coverage of Benefits transactions and processing.

**Covered Topics:**
- Initiate and process Benefit events
- The logic of event coordination
- How to process multiple events
- Managing dependents and beneficiaries
- Passive events
- Evidence of insurability
- Open enrollment

**Prerequisites:** Workday Core Concepts (suggested)

This course is approved for 5.5 Recertification Credit Hours (RCH) with the American Payroll Association.

**Learning Objectives:**
- Describe the transactional impacts of Benefits configuration
- Complete common Benefits transactions
Learn In-Person

Business Process Fundamentals

**Delivery Mode:** Learn Virtual

**Audience:** Workday Administrator

**Prerequisites:**

**Library:**

**Description:**
The Workday Business Process Framework consists of a powerful set of tools that enable you to automate business processes and deliver the right information to the right people at the right time. Through a series of demos and hands-on activities, this three-day virtual instructor-led course will introduce you to the fundamentals of business process configuration and administration to support the successful deployment and ongoing management of business processes.

**Covered Topics:**

- Business process terminology
- Relationships between business processes, organizations, and configurable security
- Basic configuring and editing of delivered business process types
- Validations, attachments, questionnaires, reports, and documents
- Condition rules and advanced routing
- Event management
- Business process reports

**Required Prerequisites:** None

**Recommended Prerequisites:** None

**Learning Objectives:**

- Configure a range of business process definitions using various process steps types, such as Action, Approval, Approval Chains, Checklists, and Questionnaires
- Add condition rules that apply further logic to your business process
- Leverage notifications, documents, and reports to create more meaningful business process transactions
- Configure business process security to support defined roles and tasks
- Test and troubleshoot your business process to ensure they are functioning as designed
- Manage and perform actions on business process events as an administrator
Learn In-Person

Calculated Fields

Delivery Mode: Learn Virtual

Audience: Integration Lead

Prerequisites:

Library:

Description:

The Calculated Fields Curriculum is designed to package all of the training requirements within the curriculum. Select "Request" to add the Calculated Fields Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements.

Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisite: Report Writer

Training Course Summary:
Report Writer (1.5 Training Units)

In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

Calculated Fields (1 Training Unit)

This course explores the capabilities of calculated fields in Workday. Calculated fields support many functions that enable you to format existing data as well as derive new values. You will learn how to create calculated fields that manipulate dates and text, evaluate conditions, work with data from related objects, and perform arithmetic calculations. Through a series of demonstrations and hands-on activities, you will learn how to add calculated fields to custom reports to meet complex business requirements. Calculated fields can also be used in outbound integrations to transform Workday data based on the requirements of external systems.
Compensation Fundamentals

Delivery Mode: Learn In-Person
Audience: Functional Lead and Workday Administrator

Prerequisites:
Library:

Description:
This four-day instructor-led course will cover the fundamentals of compensation. Through a series of demonstrations and hands-on activities, you will learn the basic configuration of core compensation components, compensation eligibility rules and the methods of defaulting compensation, as well as advanced features such as steps and step progression, severance, and benchmark jobs.

Covered Topics:
⦁ Compensation eligibility rules
⦁ Default compensation
⦁ Compensation basis
⦁ Compensation grades
⦁ Compensation elements and element groups
⦁ Compensation plans
⦁ Compensation changes and transactions
⦁ Compensation tools

This is an advanced topic course and assumes you have fundamental knowledge of Workday HCM. It is not recommended to take this as an introduction to Workday.

Prerequisites:
At least one of the following:
Workday Core Concepts (suggested)
HCM Fundamentals (suggested)

This course has some sessions with the option to attend remotely in our Hybrid classroom. In order to participate remotely, the following is required:
⦁ Zoom software downloaded on your computer
⦁ Course materials are provided as eBooks only, hosted by VitalSource
⦁ A working webcam, which must be on for the entire session

This course is approved for 14 Recertification Credit Hours (RCH) with the American Payroll Association.

Learning Objectives:
⦁ Explain the structure of compensation in Workday
⦁ Configure and differentiate between compensation eligibility rules and default compensation
⦁ Define the core compensation components of grades, elements, element groups, and compensation basis
⦁ Configure all compensation plan types
⦁ Create a compensation package
⦁ Explain, configure, and initiate common compensation transactions
⦁ Execute administrative tasks
Learn In-Person

**Composite Reporting**

**Delivery Mode:** Learn Virtual

**Audience:** Integration Lead

**Prerequisites:**

**Library:**

**Description:**

The Composite Reporting Fundamentals Curriculum is designed to package all of the training requirements within the curriculum. Select "Request" to add the **Composite Reporting Fundamentals Curriculum** to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

**Training Requirements:**

**Prerequisites:** Report Writer

Recommended Prerequisites: Financials Fundamentals or HCM Fundamentals

**Training Course Summary:**

**Report Writer (1.5 Training Units)**

In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Composite Reporting Fundamentals (1.5 Training Units)**

This course is for the advanced report writer who needs to create complex custom reports involving financial reporting, HCM, and reports that blend data across Workday products. Composite reporting is a powerful tool that allows you to join Workday data. This may include joining data from multiple data sources using subreports or running the same subreport over multiple time periods, and may be applied to financial, HCM, or blended use cases. Additionally, composite reports allow you to perform column, row, and cell calculations; apply formatting styles; filter rows with outlining by multiple business objects; and apply outlining to repeating columns. In this three-day virtual instructor-led course, you will learn the fundamentals of composite reporting and apply these concepts to create complex custom reports that blend data across Workday products.
Learn Virtual

Workday provides a security framework that enables you to configure what a given user can see and do in the system. Through security group configurations, a user can navigate and access Workday-delivered items, such as reports, tasks, and the ability to participate in business process transactions. Through a series of demonstrations and hands-on activities, this two-day virtual instructor-led course will introduce you to the fundamentals of security configuration and administration.

Covered Topics:
⦁ Configurable Security Framework
⦁ Domain Security Policies
⦁ Business Process Security Policies
⦁ Security Policy Activation and Change Control
⦁ Automatically-Assigned Security Groups
⦁ User-Based Security Groups
⦁ Role-Based Security Groups
⦁ Security Group Types and Use Cases
⦁ Security Maintenance and Reporting

Required Prerequisites: None

Recommended Prerequisites: It is recommended to attend the free Learn On-Demand offering, titled Organization and Security, prior to attending the Configurable Security Fundamentals course.

Learning Objectives:
⦁ Describe the elements of the Configurable Security Framework.
⦁ Navigate and configure domain and business process security policies.
⦁ Match security groups types with appropriate use cases.
⦁ Create and assign unconstrained user-based security groups.
⦁ Create and deploy constrained role-based security groups for a variety of use cases.
⦁ Manage and troubleshoot security using delivered reports.
Learn In-Person

Core Connector / Document Transformation

Delivery Mode: Learn Virtual
Audience: Business User, Functional Lead, Workday Administrator, and Executive
Prerequisites:
Library:
Description:

The Core Connectors & Document Transformation Curriculum is designed to package all of the training requirements within the curriculum.

Select "Request" to add the Core Connectors & Document Transformation Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisites: Report Writer and Workday Integration System Fundamentals
Training Course Summary:
Report Writer (1.5 Training Units)
In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

The Workday Integration System Fundamentals (1 Training Unit)
The Workday Integration System Fundamentals class will introduce Workday Users to tools and concepts needed to build and maintain Workday integration systems. We will introduce the different technologies used to integrate with Workday, help understand strengths and limitations of each and how to consider using certain technologies. This class will also introduce basic concepts of XML technologies and how they are using in Workday integrations. We will not build specific integrations in this class. The class is designed to prepare you to understand the Workday Integration Architecture and associated integration technologies.

Core Connectors & Document Transformation (1 Training Unit)
The Core Connectors & Document Transformation course covers the use of pre-built integration templates called Core Connectors to build integrations systems. Connectors address the majority of the integration effort required to connect to third-party end points. Connectors provide a rapid, flexible, and repeatable method for integrating with Workday, and ensure that all external systems receive only the data that you want to expose.
Learn In-Person

Custom Fields: Configuration and Administration

Delivery Mode: Learn Virtual
Audience: Integration Lead
Prerequisites:
Library:
Description:

The Custom Fields: Configuration and Administration Curriculum is designed to package all of the training requirements within the curriculum.

Select "Request" to add the Custom Fields: Configuration and Administration Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements.

Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisite: Report Writer
Recommended Prerequisite: Calculated Fields

Training Course Summary:

Report Writer (1.5 Training Units)
In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

Custom Fields: Configuration and Administration (1 Training Unit)
This course introduces you to the power of custom fields and how to manage data for which Workday does not provide ready-made fields. Once configured, custom fields are available throughout the application, from reporting, to business rules, to integrations. Most importantly, custom fields are designed to persist through every future update as tenanted data, without additional cost or effort. Designed for technical administrators, this course combines lectures, demonstrations, and hands-on activities to teach the basics of custom field setup and administration. You will learn how to configure single instance, multi-instance, non-effective dated and effective dated custom objects and incorporate them in reports, calculated fields, and condition rules to meet unique business requirements.
Customer Accounts & Customer Contracts

Learn In-Person

Customer Accounts & Customer Contracts
Delivery Mode: Learn Virtual
Audience: Functional Lead and Workday Administrator
Prerequisites: (Core Concepts) OR (Core Concepts - Learn Independent) OR (Financials Fundamentals)

Library:

Description:
This course is designed to give customers in-depth configuration knowledge of the Workday Revenue product. In this class, you will configure revenue categories, create sales items, and define worktag usage. You will also learn how to configure the UI for the Create task as well as gain a better understanding of how to manage customer contracts for efficient document delivery. Lastly, you will create a new customer, and execute a customer contract through payment for both deferred and non-deferred revenue. You will also be exposed to many of the standard Workday reports for revenue and customer accounts. The class will consist of lecture, demonstration, and individual hands-on activities.

Covered Topics:
• Introduction to Customer Accounts & Customer Contracts
• Revenue Framework
• Customers
• Customer Invoices
• Billing Schedules & Taxes
• Customer Contracts
• Revenue Recognition
• Payments
• Reporting

Required Prerequisites: (Core Concepts) OR (Core Concepts - Learn Independent) OR (Financials Fundamentals)

Learning Objectives:
• Describe the revenue life cycle.
• Identify revenue domains and business processes.
• Configure tax defaulting.
• Navigate a customer profile.
• Create a customer.
• Create a customer contract.
• Create a billing schedule.
• Create a customer invoice for billing installments.
• Manage customer invoices.
• Create a revenue recognition schedule.
• Create revenue recognition accounting.
• Record and apply a customer payment.
• Configure auto-application of customer payments.
• Create a customer refund.
• Write off bad debt.
• Add a custom report to the customer profile group.
Learn In-Person

Financials Fundamentals

Delivery Mode: Learn In-Person
Audience: Functional Lead and Workday Administrator

Prerequisites:

Library:

Description:
This course is designed to help learn the fundamentals necessary to begin your Workday Financials implementation. In this class, we will execute the major financial events (transactions), perform administrative activities, and perform setup of the core system functionality. This class will consist of lecture, demonstration, and individual hands-on activities.

Objectives:
⦁ Navigate the Workday system and use common screen elements.
⦁ Setup custom worktags.
⦁ Setup a new company.
⦁ Setup financial accounting for a company.
⦁ Setup cost centers and cost center hierarchies.
⦁ Create a custom organization.
⦁ Configure a Role Based Security group.
⦁ Maintain a Business Process.
⦁ Create manual/accounting journals online and via EIB using web services.
⦁ Understand how to configure Account Posting Rules.
⦁ Create a supplier and enter supplier invoices.
⦁ Setup a new bank account and run settlement.
⦁ Create a customer and enter customer invoices.
⦁ Complete receipt of customer payments.
⦁ Use Workday to process a period close event.

Required Prerequisites: None
Recommended Prerequisites: Workday Core Concepts

Learning Objectives:
HCM Fundamentals

Delivery Mode: Learn In-Person
Audience: Functional Lead and Workday Administrator

Prerequisites:

Library:

Description:
This four-day instructor-led course consists of lectures, demonstrations, and individual/group activities covering the configuration, functionality, and features of Workday HCM.

Learning Objectives:
⦁ Perform basic system navigation.
⦁ Build supervisory organizations.
⦁ Compare staffing models.
⦁ Create job profiles.
⦁ Configure core compensation components.
⦁ Explain key security concepts.
⦁ Define and manage business processes.
⦁ Perform common HCM transactions such as hire, transfer, and terminate.
⦁ Explain the benefits of self-service functionality.
⦁ Run delivered reports and configure basic custom reports.

This course has some sessions with the option to attend remotely in our Hybrid classroom. In order to participate remotely, the following is required:
⦁ Zoom software downloaded on your computer
⦁ Course materials are provided as eBooks only, hosted by VitalSource
⦁ A working webcam, which must be on for the entire session

This course is approved for 14 Recertification Credit Hours (RCH) with the American Payroll Association.

Required Prerequisites: None
Recommended Prerequisites: Core Concepts
Learn Virtual

Business User and Workday Administrator

This two-day virtual instructor-led course with cover many basic transactions and discuss the steps and core concepts that drive those transactions. Through a series of demonstrations and hands-on activities, you will become more familiar with the Workday system and methods of navigation to efficiently execute business transactions.

Covered Topics:
- Navigation
- Core Concepts
- Staffing Transactions
- Event Management
- Delegation

Required Prerequisites: None

Recommended Prerequisites: Workday Core Concepts

This course is approved for 5.5 Recertification Credit Hours (RCH) with the American Payroll Association

Learning Objectives:
- Execute general system navigation techniques
- Explain the basics of security configuration and the relationship to transaction execution and access
- Follow a business process through a transaction event
- Explain the relationship between transactions and organizations
- Define staffing models
- Execute and troubleshoot common staffing transactions
- Manage existing transactions
Integration Security

Delivery Mode: Learn Virtual
Audience: Workday Administrator

Prerequisites:
Library:
Description:

The Integration Security Curriculum is designed to package all of the training requirements within the curriculum. Select "Request" to add the Integration Security Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements.

Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisite: Configurable Security Fundamentals
Recommend Prerequisite: Integration System Fundamentals

Training Course Summary:
Configurable Security Fundamentals (1 Training Unit)
Workday provides a security framework enabling you to configure access to Workday domains (predefined sets of related securable items that include reports, tasks, instance sets, report fields, and data sources) and business processes. Through a series of demos and hands-on activities, this course will introduce you to the fundamentals of security configuration and administration.
Recommended Prerequisites: It is recommended to attend the free Learn On-Demand offering, titled Organization and Security, prior to attending the Configurable Security Fundamentals course.

Integration Security (1 Training Unit)
This course focuses on the security configuration required to launch Workday integrations and access the underlying data. It covers security requirements for a variety of integration types, including Connector and Enterprise Interface Builder (EIB) integrations. It also covers the use of segment-based security groups to control business user access to integration systems. Through a series of demonstrations and hands-on activities, you will learn how to configure and maintain integration security using ISUs and integration system security groups. This course is targeted toward security administrators responsible for managing integration security.
**Introduction to Workday Studio**

**Delivery Mode:** Learn Virtual

**Audience:** Integration Lead

**Prerequisites:**

**Library:**

**Description:**

The Introduction to Workday Studio Curriculum is designed to package all of the training requirements within the curriculum.

Select "Request" to add the **Introduction to Workday Studio Curriculum** to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

**Training Requirements:**

**Prerequisites:** Report Writer and Workday Integration System Fundamentals

**Training Course Summary:**

**Report Writer (1.5 Training Units)**

In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Workday Integration System Fundamentals (1 Training Unit)**

The Workday Integration System Fundamentals class will introduce Workday Users to tools and concepts needed to build and maintain Workday integration systems. We will introduce the different technologies used to integrate with Workday, help understand strengths and limitations of each and how to consider using certain technologies. This class will also introduce basic concepts of XML technologies and how they are using in Workday integrations. We will not build specific integrations in this class. The class is designed to prepare you to understand the Workday Integration Architecture and associated integration technologies.

**Introduction to Workday Studio (1 Training Unit)**

The Introduction to Workday Studio course will orient you to the Workday Studio development environment and show you how to begin working with Assemblies. Through hands-on activities and demonstrations, the course will introduce building Workday Studio Assembly projects and using Assembly Components and Steps.

Workday Studio is a unified Eclipse-based environment that allows Workday customers and third parties to develop, deploy, debug, and support their own complex integrations running in the Workday Cloud. Unlike Simple EIB integration systems, the Workday Studio is not limited to one data source, one transformation and one destination. Instead, Workday Studio can be used to create sophisticated integrations that use several reports and Workday Web Services (WWS), several transformations, and deliver results to several destinations.
Onboarding in Workday

Delivery Mode: Learn Virtual

Audience: Business User and Workday Administrator

Prerequisites:

Library:

Description:
This two-day virtual instructor-led class will provide customers with an understanding of Workday’s Onboarding functionality, and how to configure Workday Onboarding for new hires and/or pre-hires. You will also learn how to include Onboarding as a sub process in other business processes such as Change Job.

Covered Topics:

⦁ The Onboarding business process
⦁ Bulletin and announcement worklets
⦁ The Onboarding dashboard
⦁ Document tracking
⦁ The Form I-9 business process
⦁ Form I-9 to E-Verify integration
⦁ Onboarding pre-hires and pre-contingent workers
⦁ Workday-delivered reports

Recommended pre-requisite: Form I-9 and E-Verify Integration Overview (Online Class - 6 Minutes)
These titles will be assigned to you after registration to view prior to the course start date

Required Prerequisites: None

Learning Objectives:

⦁ Organize Onboarding Dashboard to communicate relevant corporate and job-related information
⦁ Guide workers through a checklist of actions
⦁ Connect new hires to helpful contacts as well as important people to meet in the organization
⦁ Distribute documents to new hires and track acknowledgements or electronic signatures
⦁ Create electronic Form I-9s for U.S. employment verification
⦁ Transfer the Form I-9 to E-Verify using Workday’s web services
Payroll - Retroactive Processing

Delivery Mode: Learn Virtual

Audience: Business User, Functional Lead, Workday Administrator, Implementer, and Internal

Prerequisites: (Payroll Consulting Core) OR (Payroll Fundamentals) OR (Payroll Transactions)

Library:

Description:
Practice using the retroactive processing features of Workday Payroll in this hands-on training. The class starts with simple examples to highlight the typical retroactive payroll processing flow, and then examines real world examples and complexities inherent in retroactive processing.

This course is approved for 2.5 Recertification Credit Hours (RCH) with the American Payroll Association.

Covered Topics:
- Retro processing overview
- Types of retro events
- Important retro dates
- On-demand retro payments
- Pay component configuration for retro processing
- Retro audit reports

Prerequisite: Payroll Transactions or Payroll Fundamentals

Learning Objectives:
- List the retro payroll processing steps
- Process different types of retro events
- Issue on-demand retro payments
- Verify that pay components are configured for retro
- Audit retro results.
Learn In-Person

Payroll Fundamentals for Canada

Delivery Mode: Learn In-Person

Audience: Business User, Integration Lead, Functional Lead, and Workday Administrator

Prerequisites:

Library:

Description:

To be Workday Payroll trained, you must complete the 2 required courses included in this curriculum.

Required Courses:

Payroll Fundamentals is a four-day, Learn In Person course that will prepare participants to configure the core elements of Workday Payroll, including the payroll processing framework, taxes, the calculation engine, withholding orders, payroll accounting, banking and settlement, and payroll-specific business processes and security.

Payroll for Canada - Learn Independent is a Learn Independent training comprised of approximately 15 - 20 hours of material and includes a training tenant. This course will cover payroll functionality specific to configuring and processing payroll to meet Canada-specific requirements.

This curriculum will prepare you to set up, run, and administer payroll for Canada. This course is targeted to your implementation team and ongoing payroll administrators. It will cover in-depth configuration concepts and hands-on activities.

Please follow the steps, in order to register for both courses:

1. Register for Payroll Fundamentals
2. a. The cost is 5.5 Training Units and will cover both courses
3. Once you have successfully completed Payroll Fundamentals you will receive Payroll for Canada - Learn Independent Curriculum within 24 hours.

Important Information:

- Within 24 hours of successful completion of Payroll Fundamentals, the course curriculum for the Learn Independent course will be added to your transcript.
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Required Prerequisites: None
Learn In-Person

Payroll Fundamentals for France

Delivery Mode: Learn In-Person

Audience: Workday Administrator

Prerequisites:

Library:

Description:

To be Workday Payroll trained, you must complete the 2 required courses included in this curriculum.

Required Courses:

Payroll Fundamentals is a four-day, Learn In Person course that will prepare participants to configure the core elements of Workday Payroll, including the payroll processing framework, taxes, the calculation engine, withholding orders, payroll accounting, banking and settlement, and payroll-specific business processes and security.

Payroll for France - Learn Independent is a Learn Independent training comprised of approximately 15 - 20 hours of material and includes a training tenant. This course will cover payroll functionality specific to configuring and processing payroll to meet France-specific requirements.

This curriculum will prepare you to set up, run, and administer payroll for France. This course is targeted to your implementation team and ongoing payroll administrators. It will cover in-depth configuration concepts and hands-on activities.

Please follow the steps below:

1. Register for Payroll Fundamentals
2. a. The cost is 5.5 Training Units and will cover both courses
3. Once you have successfully completed Payroll Fundamentals you will receive the Payroll for France - Learn Independent Curriculum within 24 hours.

Important Information:

• Within 24 hours of successful completion of Payroll Fundamentals, the course curriculum for the Learn Independent course will be added to your transcript.
•
• For more information about Payroll training, please visit the Payroll FAQ.

Required Prerequisites: None
Learn In-Person

**Payroll Fundamentals for the U.S.**

**Delivery Mode:** Learn In-Person  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:**  
**Description:**

To be Workday Payroll trained, you must complete the 2 required courses included in this curriculum.

**Required Courses:**

**Payroll Fundamentals** is a four-day, Learn In Person course that will prepare participants to configure the core elements of Workday Payroll, including the payroll processing framework, taxes, the calculation engine, withholding orders, payroll accounting, banking and settlement, and payroll-specific business processes and security.

**Payroll for the U.S. - Learn Independent** is a Learn Independent training comprised of approximately 15 - 20 hours of material and includes a training tenant. This course will cover payroll functionality specific to configuring and processing payroll to meet U.S.-specific requirements.

This curriculum will prepare you to set up, run, and administer payroll for the U.S. This course is targeted to your implementation team and ongoing payroll administrators. It will cover in-depth configuration concepts and hands-on activities.

Please follow the steps, in order to register for both courses:

1. Register for Payroll Fundamentals  
2. a. The cost is 5.5 Training Units and will cover both courses  
3. Once you have successfully completed Payroll Fundamentals you will receive the Payroll for the U.S. - Learn Independent Curriculum within 24 hours.

**Important Information:**

- Within 24 hours of successful completion of Payroll Fundamentals, the course curriculum for the Learn Independent course will be added to your transcript.
- For more information about Payroll training, please visit the Payroll FAQ.

**Required Prerequisites:** None
Learn In-Person

Payroll Fundamentals for the UK

Delivery Mode: Learn In-Person

Audience: Functional Lead

Prerequisites:

Library:

Description:

To be Workday Payroll trained, you must complete the 2 required courses included in this curriculum.

Required Courses:

Payroll Fundamentals is a four-day, Learn In Person course that will prepare participants to configure the core elements of Workday Payroll, including the payroll processing framework, taxes, the calculation engine, withholding orders, payroll accounting, banking and settlement, and payroll-specific business processes and security.

Payroll for the UK - Learn Independent is a Learn Independent training comprised of approximately 15 - 20 hours of material and includes a training tenant. This course will cover payroll functionality specific to configuring and processing payroll to meet UK-specific requirements.

This curriculum will prepare you to set up, run, and administer payroll for the UK. This course is targeted to your implementation team and ongoing payroll administrators. It will cover in-depth configuration concepts and hands-on activities.

Please follow the steps, in order to register for both courses:

1. Register for Payroll Fundamentals
2. a. The cost is 5.5 Training Units and will cover both courses
3. Once you have successfully completed Payroll Fundamentals you will receive Payroll for the UK - Learn Independent Curriculum
4. within 24 hours.

Important Information:

- Within 24 hours of successful completion of Payroll Fundamentals, the course curriculum for the Learn Independent course will be added to your transcript.
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Required Prerequisites: None
Learn In-Person

Payroll Transactions

Delivery Mode: Learn Virtual
Audience: Business User

Prerequisites:

Library:

Description:
Are you a payroll professional new to Workday Payroll? Attend this two-day virtual instructor-led course to practice processing and auditing payroll in Workday. In this hands-on training, you complete the payroll processing cycle, explore the payroll framework, and identify reports to validate your results.

This course is approved for 7.5 Recertification Credit Hours (RCH) with the American Payroll Association.

Covered Topics:
⦁ Navigation in Workday
⦁ Payroll process
⦁ Payroll framework
⦁ Net pay validation and arrears
⦁ Payroll input
⦁ Withholding orders
⦁ Banking and settlement
⦁ Off-cycle processing

Recommended Prerequisites: Workday Core Concepts and practical knowledge of common payroll processes. We do not cover configuring Workday Payroll in this class. If you are a Workday payroll administrator or have a role in deploying Workday Payroll, consider the Payroll Fundamentals course instead.

Learning Objectives:
⦁ Explain the payroll process
⦁ Use the payroll processing framework
⦁ Enter payroll input
⦁ Process payroll
⦁ Audit payroll
⦁ Troubleshoot payroll
⦁ Update withholding orders
⦁ Identify basic payroll business processes
⦁ Use payroll reports
Learn In-Person

**Performance Management**

**Delivery Mode:** Learn Virtual

**Audience:** Business User and Workday Administrator

**Prerequisites:**

**Library:**

**Description:**
This three-day virtual instructor-led class consists of lectures, demonstrations, and individual activities covering Workday Performance Management. Customers who take this class will learn how to configure, populate, initiate, and manage performance reviews, as well as ongoing feedback, for their organization.

**Covered Topics:**
- Types of performance reviews
- Goal management
- Employee feedback
- Performance review template configuration
- Rating and weighting
- The Performance Review business process
- Calibration
- Pay for performance
- Performance reporting

This course is approved for 5.5 Recertification Credit Hours (RCH) with the American Payroll Association

**Required Prerequisites:** None

**Learning Objectives:**
- Create and configure review templates
- Launch employee reviews
- Manage goals, feedback, and competencies outside of a review event
- Calibrate your organization’s performance ratings
- Tie performance data to a compensation event

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**Planning Fundamentals**

**Delivery Mode:** Learn In-Person

**Audience:** Business User

**Prerequisites:**

**Library:**

**Description:**
Planning supports the enterprise planning lifecycle for both financials and HCM, combining real-time analytics with your transactional system. In this four-day instructor-led course, you will learn how to structure plans, generate plans based on prior plans or prior year actuals, collaborate on plans using Worksheets, and finalize the planning process to create financial or headcount budgets.

**Required Prerequisites:** None

**Learning Objectives:**
- Define plan structures and templates
- Establish plan generator rules to create new plans
- Manage plan collaboration using worksheets
- Finalize the planning process to create a budget
- Utilize delivered planning reports and create custom reports
The Prism Analytics Curriculum is designed to package all of the training requirements within the curriculum. Select "Request" to add the **Prism Analytics Curriculum** to your transcript and follow the registration steps outlined in the Prerequisite Requirements.

**Visit the Cross Application Training Paths and Frequently Asked Questions.**

**Training Requirements:**
- **Prerequisite:** Report Writer
- **Recommended Prerequisites:** Intermediate knowledge of SQL

**Training Course Summary:**
- **Report Writer (1.5 Training Units)**
  In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

- **Prism Analytics (1 Training Unit)**
  This course covers the end-to-end process of combining data from Workday with external data sources and publishing it to report consumers using Workday Prism Analytics. Workday Prism Analytics provides executives and managers with a full picture of their business by empowering their analysts to enrich their financial and people analytics in Workday with data from any source. In this training, you will learn how to create data pipelines that blend and transform the data using Prism functions. You will secure the Prism data source using the configurable security framework so that it can be published for use in Workday reports. Finally, you will learn how to perform ad hoc analysis in data discovery.
Learn In-Person

Procure-to-Pay Fundamentals

Delivery Mode: Learn In-Person

Audience: Functional Lead and Workday Administrator

Prerequisites:

Library:

Description:
In this three day course you will learn the fundamentals necessary to begin your Workday Procurement implementation. This in-person instructor led course we will teach you how to execute the major Procurement events (transactions), perform administrative activities, and perform setup of the core system functionality. The three days will consist of lecture, demonstration, and individual hands-on activities.

Covered Topics:
- Suppliers and catalog contracts
- Procurement for goods, services, and contingent labor
- Supplier invoices
- Spend management
- Requests for quote
- Business assets
- Supplier invoice matching
- Spend reporting

Required Prerequisites: None
Recommended Prerequisites: Workday Core Concepts

Learning Objectives:
- Set up organizations
- Procure goods, services, and contract labor
- Create requisitions, purchase orders, receipts, invoices, and payments
- Set up request for quote
- Review supplier invoice matching
- Manage supplier collaboration
- Review spend reporting
Learn In-Person

**Recruiting Fundamentals**

**Delivery Mode:** Learn In-Person  
**Audience:** Business User, Functional Lead, and Workday Administrator  

**Prerequisites:**

**Library:**

**Description:**
If you are a key member of your organization when it comes to configuring or making decisions about Workday Recruiting, this course is for you. This four-day, instructor-led course focuses on configuration options, features, functionality, and use of the powerful recruiting tools in Workday. We will dive into tenant, security, and business process setup, with an emphasis on how recruiting administrators and recruiting managers can help their organizations use Workday Recruiting to full advantage. For Workday Recruiting end users who want to learn more about day-to-day transactions and processes, we offer the Recruiting Transactions course.

**Covered Topics:**

- Security and tenant setup
- Questions and questionnaires
- Job requisitions and Evergreen requisitions
- Job postings and career sites
- Recruiting sub-processes
- The Job Application business process
- Prospects and candidates
- Referrals
- The candidate experience
- The recruiter experience
- Working with agencies
- Recruiting reports

This course has some sessions with the option to attend remotely in our Hybrid classroom. In order to participate remotely, the following is **required:**

- Zoom software downloaded on your computer
- Course materials are provided as eBooks only, hosted by VitalSource
- A working webcam, which must be on for the entire session

This course is approved for 14 Recertification Credit Hours (RCH) with the American Payroll Association.  

**Required Prerequisites:** None

**Learning Objectives:**

- Configure the tenant, security, and business processes for Recruiting.
- Create candidate questions and questionnaires.
- Create and manage job and Evergreen requisitions.
- Manage job postings on your internal and external career sites.
- Configure recruiting sub-processes and the dynamic job application business process.
- Manage candidates and referrals.
- Apply as internal and external candidates.
- Configure and use Agencies.
- Interpret recruiting reports.
Learn In-Person

Recruiting Transactions

Delivery Mode: Learn Virtual

Audience: Business User, Functional Lead, and Workday Administrator

Prerequisites:

Library:

Description:
This course is designed for recruiters and recruiting team members who will be involved with day-to-day recruiting transactions. This training is intended to be completed prior to or any time after deployment and would be helpful for recruiters who join the organization after the launch of Workday. In this three-day virtual instructor-led course, you will learn about the features, functionality, and usage of Recruiting in Workday. We do not cover configuring Workday Recruiting in this class. If you are a Workday Recruiting Administrator and/or have a role in deploying Workday Recruiting, please see the Workday Recruiting Fundamentals course.

Covered Topics:

⦁ Job Requisitions and evergreen requisitions
⦁ Career sites and job postings
⦁ Prospects, candidates, and referrals
⦁ The job application business process
⦁ The candidate experience
⦁ Candidate management
⦁ Recruiting agencies
⦁ Recruiting analytics

Required Prerequisites: None

Learning Objectives:

⦁ Explain Workday Recruiting concepts.
⦁ Create questions and questionnaires.
⦁ Create job requisitions and evergreen requisitions.
⦁ Post jobs to internal and external career sites.
⦁ Create and manage candidates and employee referrals.
⦁ Review internal and external job applications.
⦁ Interpret the candidate list.
⦁ Work with recruiting agencies.
⦁ Access and interpret recruiting analytics.
Learn In-Person

**Report Writer**

**Delivery Mode:** Learn Virtual

**Audience:** Integration Lead

**Prerequisites:**

**Library:**

**Description:**

This virtual instructor-led course introduces you to the Workday Report Writer tool. You will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Covered Topics:**

- Basic navigation and Report Writer terminology
- Business objects and report data sources
- Standard and custom reports (Advanced report type)
- Introduction to matrix reports
- Sorting, filtering, grouping, and totaling data
- Scheduling reports
- Introduction to calculated fields
- Report access and security
- Report performance

**Required Prerequisites:** None

**Learning Objectives:**

- Create a custom report using the Advanced report type that filters, sorts, groups, and totals the data.
- Create a basic matrix report that summarizes the data and uses drillable fields.
- Use the tools in Workday to determine the appropriate business object and data source for a report.
- Create a basic calculated field to display data from a related business object on a report.
- Troubleshoot why a user cannot access a report or see certain data on the report.
- Explain the performance considerations when creating a custom report.
Learn In-Person

Simple Integrations

Delivery Mode: Learn Virtual
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: 
Library: 
Description:

The Workday Simple Integrations Curriculum is designed to package all of the training requirements within the curriculum.
Select "Request" to add The Workday Simple Integrations Curriculum to your transcript. Next steps follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

Training Requirements:
Prerequisites: Report Writer and Workday Integration System Fundamentals
Training Course Summary:
Report Writer (1.5 Training Units)
In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

Workday Integration System Fundamentals (1 Training Unit)
The Workday Integration System Fundamentals class will introduce Workday Users to tools and concepts needed to build and maintain Workday integration systems. We will introduce the different technologies used to integrate with Workday, help understand strengths and limitations of each and how to consider using certain technologies. This class will also introduce basic concepts of XML technologies and how they are using in Workday integrations. We will not build specific integrations in this class. The class is designed to prepare you to understand the Workday Integration Architecture and associated integration technologies.

Workday Simple Integrations (1.5 Training Units)
The Workday simple integrations course focuses on mechanisms for using custom report results in integrations and loading data through generated template models. Through a series of presentations, demonstrations, and activities, you will learn how to build and launch an integration that extracts data out of Workday and sends it to an external system, learn about the different template models with the different functional areas and how to generate, customize and populate those templates for inbound transactions. You will also learn how to use a business process to trigger an outbound integration and custom XSLT to transform report data. This class will stress the importance of business processes, Reference IDs, and data structure when you are working with both inbound and outbound data. This course is designed for business analysts and developers who will be using generated templates to import data into workday and using Workday Reports as a Service (RaaS) for outbound data.
Learn In-Person

**Student Fundamentals**

**Delivery Mode:** Learn In-Person  
**Audience:** Business User

**Prerequisites:**

**Library:**

**Description:**

This four-day instructor-led class is designed to provide you with the fundamentals to successfully configure and use the features and functionality of the Workday Student product. The course consists of lectures, demonstrations, and activities covering the basics of Workday, and the core Workday Student-specific functionality you will use in your own organization. Successful completion of this course is a recommended pre-requisite for subsequent Workday Student training.

**Covered Topics:**

- Core Concepts and Navigation
- Organizations and Academic Foundation
- Overview of Workday Configurable Security
- Business Process Framework
- The Student Core Framework
- Overview of Report Writer
- Student Recruiting & Admissions
- Student Records, Academic Advising, and Curriculum Management
- Student Financial Services and Financial Aid

**Required Prerequisites:** None  
**Recommended Prerequisites:** None

**Learning Objectives:**

- Navigate the Workday system and use common screen elements
- Identify the details of a security configuration
- Identify and edit the steps of a business process
- List and identify the report types delivered by Workday
- Run, copy, and create a custom report using the Report Writer tool
- Plan and configure an academic foundation structure
- Leverage the campus engagement framework
- Identify the steps and details of the student recruiting and admissions process
- Identify the steps and details of managing student records and the advising processes
- Identify the steps and details of curriculum management
- Identify the steps and details involved in the management of student financials
- Identify the steps and details involved in managing student financial aid
Learn In-Person

Student Records and Advising Fundamentals

Delivery Mode: Learn In-Person

Audience: Business User, Functional Lead, Workday Administrator, and Managers and Employees

Prerequisites:

Library:

Description:
This four-day, instructor-led class is designed to provide you with the information to successfully configure and use the student records and advising features and functionality of the Workday Student product. The course consists of lectures, demonstrations, and activities that review the academic foundation and cover the core Workday Student records and advising-specific functionality you will use in your own organization, including curriculum management, academic advising, student registration, and student records.

Covered Topics:
⦁ Academic Foundation Review
⦁ Curriculum Management
⦁ Academic Requirements and Planning
⦁ Student Registration
⦁ Academic Records

Required Prerequisites: None
Recommended Prerequisites: Student Fundamentals

Learning Objectives:
⦁ Explain and configure an academic structure.
⦁ Define academic policies.
⦁ Identify and manage the details of course creation and configuration.
⦁ Explain student activities such as practical learning, orientation, and study abroad.
⦁ Create and configure academic requirements.
⦁ Create academic plan templates and attach them to programs of study.
⦁ Create student cohorts and assign employees to roles on cohorts.
⦁ Configure grading and enter grades.
⦁ Configure and process transfer credit.
⦁ Perform the program completion process.
⦁ Generate a transcript.
**Student Recruiting and Admissions Fundamentals**

**Delivery Mode:** Learn Virtual  
**Audience:** Implementer

**Prerequisites:**

**Library:**

**Description:**
Workday Student Recruiting and Admissions provides the framework and tools you need to recruit and admit prospective students. This two-day virtual instructor-led course will review configuring the academic foundation required to support student recruiting and admissions as well as information on the campus engagement framework that facilitates recruiting prospective students. In addition, the course will provide information on configuring and executing student recruiting and admissions for your institution. Please note that this course is not designed as a first introduction to Workday. If you are new to Workday and aren’t familiar with basic Workday navigation or core Workday foundational topics such as organizations and the business process framework, it is recommended that you first attend Workday Core Concepts.

**Covered Topics:**
- Academic Foundation
- Student Recruiting
- Campus Engagement
- Student Admissions

**Required Prerequisites:** None  
**Recommended Prerequisites:** Student Fundamentals

**Learning Objectives:**
- Understand and configure academic foundation
- Leverage the campus engagement framework
- Configure student recruiting and admissions
- Perform student recruiting and admissions tasks
Supplier Contracts

**Delivery Mode:** Learn Virtual

**Audience:** Functional Lead and Workday Administrator

**Prerequisites:** (Financials Fundamentals) OR (Procure-to-Pay Fundamentals)

**Library:**

**Description:**
This three-day virtual instructor-led class focuses on the design, configuration setup and processing of supplier contracts. The class will focus on various supplier contract types to demonstrate the full features of the contract process. Supplier contract management enables you to record and enforce agreements with preferred suppliers, automatically generate invoices and purchase orders from contract or installment schedules, and drive contract compliance. You can define contract renewal terms and notifications before contracts expire, partition suppliers by company, and amend supplier contracts. Through a series of demonstrations and hands-on activities, you will learn how to configure and create supplier contracts processing them through the full procurement process.

**Covered Topics:**
- Supplier contract types
- Renewal term options
- Purchase order and supplier invoice schedules
- Supplier contract installments
- Contract renewal and amendment processing
- Prepaid contracts
- Reporting and analytics

**Required Prerequisites:** Financials Fundamentals or Procure-to-Pay Fundamentals

**Learning Objectives:**
- Design and configure the supplier contracts setup and processing.
- Understand how to define multiple types of supplier contracts.
- Add contract schedules for the auto-generation of purchase orders and supplier invoices.
- Understand and execute the full contract lifecycle including renewals and amendments.
- Manage the procure to pay process with supplier contracts using reports and analytics.
**Talent Management**

**Delivery Mode:** Learn Virtual  
**Audience:** Business User and Workday Administrator  

**Prerequisites:** None

**Description:**
This two-day virtual instructor-led class consists of lectures, demonstrations and individual activities covering how to track and use talent data for critical decision making. Using Workday’s Talent Management, customers can analyze their current workforce and predict future people needs so the appropriate actions can be taken to drive their business forward.

**Covered Topics:**
- Talent attributes
- Career and job interests & opportunities
- The competency framework
- Talent reviews and assessing potential
- Calibration setup and usage (or deployment)
- Talent pools
- Succession planning
- Talent analytics

This course is approved for 5.5 Recertification Credit Hours (RCH) with the American Payroll Association

**Required Prerequisites:** None

**Learning Objectives:**
- View talent information
- Configure talent attributes
- Utilize the opportunity graph to empower your workforce
- Configure the competency framework
- Complete talent reviews and assess potential
- Configure calibration setup and usage (or deployment)
- Create and use talent pools
- Complete succession planning
- Run talent analytics
Learn In-Person

**Time Tracking: Configuration and Administration**

**Delivery Mode:** Learn In-Person

**Audience:** Functional Lead and Workday Administrator

**Prerequisites:**

**Library:**

**Description:**
This four day instructor-led course focuses on the set up and configuration of Time Tracking components. The course employs a variety of lectures, demonstrations, and hands-on activities. Participants completing this course will leave with an in depth view of the configuration and administration of Workday Time Tracking.

**Covered Topics:**
- Time Entry Codes
- Time Calculations
- Time Entry Template
- Eligibility Rules
- Validations
- Administration
- Reporting

**Required Prerequisites:** None

**Recommended Prerequisites:** None

**Important!** Although there are no specific prerequisites, this class requires a high level of technical proficiency and the ability to define complex time calculations. It is not suitable for those who are not comfortable with basic programming logic or who have no experience defining calculations. It is not recommended that this be your very first exposure to the Workday system.

This course is approved for 14 Recertification Credit Hours (RCH) with the American Payroll Association.

**Learning Objectives:**
- Define, differentiate, and configure time entry options.
- Define and configure basic setup components for Time Tracking, including calculations and security.
- Configure Time Tracking business processes.
- Identify the touchpoints and configuration considerations between Time Tracking, Workday Payroll, Cloud Connect for Third-Party Payroll, Absence Management, and Projects.
- Configure and administer work schedules
- Execute common time tracking administrative tasks
- Administer the end-to-end Time Tracking to Payroll and/or Projects business processes
Learn In-Person

**Workday Integration System Fundamentals**

**Delivery Mode:** Learn Virtual

**Audience:** Integration Lead

**Prerequisites:**

**Library:**

**Description:**

The Workday Integration System Fundamentals Curriculum is designed to bundle all of the training requirements within the curriculum. To get started, select "Request" to add the **The Workday Integration System Fundamentals Curriculum** to your transcript. Next steps follow the registration steps outlined in the Prerequisite Requirements. **Visit the Cross Application Training Paths and Frequently Asked Questions.**

**Training Requirements:**

**Prerequisite:** Report Writer

**Training Course Summary:**

**Report Writer (1.5 Training Units)**

In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Workday Integration System Fundamentals (1 Training Unit)**

The Workday Integration System Fundamentals class will introduce Workday Users to tools and concepts needed to build and maintain Workday integration systems. We will introduce the different technologies used to integrate with Workday, help understand strengths and limitations of each and how to consider using certain technologies. This class will also introduce basic concepts of XML technologies and how they are using in Workday integrations. We will not build specific integrations in this class. The class is designed to prepare you to understand the Workday Integration Architecture and associated integration technologies.

**Workday Pro - Absence Request**

**Delivery Mode:** Learn In-Person

**Audience:** Functional Lead and Workday Administrator

**Prerequisites:**

**Library:**

**Description:**

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday's Consulting Ecosystem.

**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
- It will take up to 24 hours to receive the curriculum.
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

**Required Prerequisites:** None
## Learn In-Person

### Workday Pro - Benefits Request

| Delivery Mode: | Learn In-Person |
| Audience: | Functional Lead and Workday Administrator |
| Prerequisites: | |
| Library: | |
| Description: | Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.  
**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable. |

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
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- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

**Required Prerequisites:** None

### Workday Pro - Compensation Request

| Delivery Mode: | Learn In-Person |
| Audience: | Functional Lead and Workday Administrator |
| Prerequisites: | |
| Library: | |
| Description: | Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.  
**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable. |

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
- It will take up to 24 hours to receive the curriculum.
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

**Required Prerequisites:** None
Learn In-Person

Workday Pro - Core Connectors and Document Transformation Request

**Delivery Mode:** Learn In-Person  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:**  
**Description:**

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.  
**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.  
- It will take up to 24 hours to receive the curriculum.  
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.  
For more information on Workday Pro and the requirements per track, please visit our Community site  
**Required Prerequisites:** None

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Workday Pro - Financials Reporting Request

**Delivery Mode:** Learn In-Person  
**Audience:** Business User, Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:**  
**Description:**

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.  
**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.  
- It will take up to 24 hours to receive the curriculum.  
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.  
For more information on Workday Pro and the requirements per track, please visit our Community site  
**Required Prerequisites:** None
## Workday Pro - Financials Request

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<tr>
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### Enrollment

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- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

**Required Prerequisites:** None

### Workday Pro - HCM Core Request

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### Enrollment

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
- It will take up to 24 hours to receive the curriculum.
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

**Required Prerequisites:** None
Learn In-Person

Workday Pro - Integrations Request

Delivery Mode: Learn In-Person
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: 
Library: 
Description:

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.

IMPORTANT: This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

Enrollment

⦁ Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
⦁ It will take up to 24 hours to receive the curriculum.
⦁ After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

Required Prerequisites: None

Workday Pro - Payroll for the U.S. Request

Delivery Mode: Learn In-Person
Audience: Functional Lead and Workday Administrator
Prerequisites: 
Library: 
Description:

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.

IMPORTANT: This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

Enrollment

⦁ Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
⦁ It will take up to 24 hours to receive the curriculum.
⦁ After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

Required Prerequisites: None
Learn In-Person

**Workday Pro - Performance and Talent Request**

**Delivery Mode:** Learn In-Person  
**Audience:** Functional Lead and Workday Administrator  
**Prerequisites:**  
**Library:**  
**Description:**

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.  
**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.  
- It will take up to 24 hours to receive the curriculum.  
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.  
For more information on Workday Pro and the requirements per track, please visit our Community site  
**Required Prerequisites:** None

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**Workday Pro - Recruiting Request**

**Delivery Mode:** Learn In-Person  
**Audience:** Functional Lead and Workday Administrator  
**Prerequisites:**  
**Library:**  
**Description:**

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.  
**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.  
- It will take up to 24 hours to receive the curriculum.  
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.  
For more information on Workday Pro and the requirements per track, please visit our Community site  
**Required Prerequisites:** None
Learn In-Person

Workday Pro - Reporting Request

Delivery Mode: Learn In-Person
Audience: Business User, Integration Lead, Functional Lead, and Workday Administrator
Prerequisites:
Library:
Description:

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.

IMPORTANT: This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

Enrollment

⦁ Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
⦁ It will take up to 24 hours to receive the curriculum.
⦁ After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

Required Prerequisites: None

Workday Pro - Studio Request

Delivery Mode: Learn In-Person
Audience: Integration Lead and Functional Lead
Prerequisites:
Library:
Description:

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.

IMPORTANT: This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

Enrollment

⦁ Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
⦁ It will take up to 24 hours to receive the curriculum.
⦁ After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site

Required Prerequisites: None
Learn In-Person

Workday Pro - Time Tracking Request

**Delivery Mode:** Learn In-Person  
**Audience:** Functional Lead and Workday Administrator  
**Prerequisites:**

**Library:**

**Description:**

Workday Pro is a Customer focused accreditation program targeted at customers’ employees wishing to become more competent and self-sufficient with Workday. This program has been designed to help customers develop Workday knowledge and self-sufficiency. Please note: Workday Pro is only available for employees of Workday customers. It is not intended for contingent workers or Workday’s Consulting Ecosystem.

**IMPORTANT:** This is not the Workday Pro curriculum. Once you have enrolled, it will take 24 hours for you to see the Workday Pro curriculum on your transcript. Please also note that the Registration cost of 1 TU associated with this request is non-refundable.

**Enrollment**

- Once you request this training and your Training Coordinator approves you will need to complete the checkout process before you receive the appropriate Workday Pro curriculum.
- It will take up to 24 hours to receive the curriculum.
- After successful completion, you will be required to participate in update training (1 - 3 hours approx) twice a year, aligning with the Workday product releases, to maintain your accreditation.

For more information on Workday Pro and the requirements per track, please visit our Community site  
**Required Prerequisites:** None

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Workday Report Designer (BIRT)

**Delivery Mode:** Learn Virtual  
**Audience:** Integration Lead  
**Prerequisites:**

**Library:**

**Description:**

The Workday Report Designer (BIRT) Curriculum is designed to package all of the training requirements within the curriculum. 
Select "Request" to add the Workday Report Designer (BIRT) Curriculum to your transcript and follow the registration steps outlined in the Prerequisite Requirements. Visit the Cross Application Training Paths and Frequently Asked Questions.

**Training Requirements:**

**Prerequisite:** Report Writer  
Recommended Prerequisite: Calculated Fields

**Training Course Summary:**

**Report Writer (1.5 Training Units)**

In the Report Writer training, you will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations.

**Workday Report Designer (BIRT) (1 Training Unit)**

Workday Report Designer (BIRT) enables you to design and use business form layouts for meeting the exact report layout specifications required by your organization. These specifications might include rich text formatting, headers and footers, page breaks, and exact placement of labels, data, spaces, and margins. In this 2-day virtual instructor-led training course, the accomplished Workday report writer will learn how to format Workday Report Writer reports using BIRT. This class will cover how to format the report design using various properties, expressions, report items and data sets (Note: you can define business form layouts using BIRT as part your Workday Studio Eclipse development environment).
Affordable Care Act (ACA): Configuration and Administration - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Functional Lead and Workday Administrator
Prerequisites:
Library:
Description: The Affordable Care Act (ACA): Configuration and Administration - Learn Independent is a self-paced training. This course will explore features that are designed to help you meet the requirements of the Affordable Care Act: delivered dashboards, measurement periods, eligibility events, history, and finally, reporting. These features help you identify which employees should receive medical coverage, and how to trigger enrollment events for those eligible employees. This course will require approximately 5 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

Covered Topics:
⦁ ACA Dashboard Configuration and Security Domains
⦁ ACA Measurement Periods and Eligibility Processing
⦁ ACA Government Forms

This class provides instructions for completing relevant benefits configuration tasks, but does not cover benefits concepts. To learn about benefits concepts, please enroll in Benefits Fundamentals.

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Required Prerequisites: None

Auditor Basics for Workday - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Business User, Functional Lead, and Workday Administrator
Prerequisites:
Library:
Description: The Auditor Basics for Workday - Learn Independent is a self-paced training. This course is designed to help auditors learn the fundamentals necessary to understand Workday in order to support audit activity in a Workday-enabled business. This course provides an overview of the Workday Service and introduces foundational Workday components. Concepts and basics of three key business applications will be covered: HCM, Financials, and Payroll. The course will consist of lectures, demonstrations, and individual hands-on activities, including practical, audit-based scenarios. This class has been developed for members of the audit profession but is useful to other risk and compliance disciplines. The focus of the course spans the roles of both an external and internal auditor. This course will require approximately 20 hours of work, and the assigned training tenant will be available for 14 days (336 hours).

Covered Topics:
⦁ Workday overview and support of auditor roles in Workday
⦁ Using the Workday foundational components to support audits
⦁ How HCM, Payroll, and Financial transactions are processed and audit capabilities are integrated
⦁ How to utilize Workday to perform an audit

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Required Prerequisites: None
**Banking and Settlement - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:** (Core Concepts - Learn Independent) OR (Financials Fundamentals)

**Library:**

**Description:**

The Banking and Settlement - Learn Independent is a self-paced training.

This course is designed for customers who require an in-depth knowledge of the Workday Banking and Settlement product. It will enable the student to understand some of the advanced Banking and Settlement features used during implementation projects. Content will focus on the Banking and Settlement lifecycle from configuration to analytics, and will include a deeper dive into Banking and Settlement material that is currently taught in the Financials Fundamentals class. This course will require approximately 10 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

**Prerequisites:** Core Concepts - Learn Independent or Financials Fundamentals

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

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**Business Assets - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent  
**Audience:** Business User, Workday Administrator, and Managers and Employees  
**Prerequisites:** (Core Concepts - Learn Independent) OR (Financials Fundamentals) OR (Procure-to-Pay Fundamentals)

**Library:**

**Description:**

The Business Assets - Learn Independent is a self-paced training.

After completing this learn independent course, you will be able to perform setup of required data for the Business Assets functional area. The training will detail how to configure the basic setup of asset accounting as well as advanced options such as asset registration, life cycle events, pooled and composite assets, and reporting. This course will require approximately 12 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

**Covered Topics:**

- Asset tracking
- Asset transfer
- Disposal configuration considerations
- Depreciation events
- Asset classes and types
- Book rules
- Intangible assets

**Prerequisites:** Financials Fundamentals, Procure-to-Pay, or Core Concepts - Learn Independent

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Business Process Fundamentals - Learn Independent

Delivery Mode: Learn Independent
Audience: Workday Administrator

Prerequisites:

Library:

Description:
The Workday Business Process Framework consists of a powerful set of tools that enable you to automate business processes and deliver the right information to the right people at the right time. Through a series of demos and hands-on activities, this Learn Independent course will introduce you to the fundamentals of business process configuration and administration to support the successful deployment and ongoing management of business processes.

Covered Topics:
⦁ Business process terminology
⦁ Relationships between business processes, organizations, and configurable security
⦁ Basic configuring and editing of delivered business process types
⦁ Validations, attachments, questionnaires, reports, and documents
⦁ Condition rules and advanced routing
⦁ Event management
⦁ Business process reports

Required Prerequisites: None

Recommended Prerequisites: None

Important: Learn Independent training is completed online within the session dates. This course requires approximately 15 hours of work. Please note that additional time will NOT be allotted to complete work after the session ends. All course content must be completed by the end of the session to achieve a "Completed" status.

Important: Business Process Fundamentals is a prerequisite for our Advanced Business Process course offering. These courses may not be taken concurrently; if you are also interested in taking the Advanced Business Process course, the start date must be after Business Process Fundamentals - Learn Independent end date. If you need to complete Advanced Business Process in a short time period and also need to complete Business Process Fundamentals as a prerequisite, you may consider the Business Process Fundamentals Learn Virtual Offering.

Learning Objectives:
⦁ Configure a range of business process definitions using various process steps types, such as Action, Approval, Approval Chains, Checklists, and Questionnaires
⦁ Add condition rules that apply further logic to your business process
⦁ Leverage notifications, documents, and reports to create more meaningful business process transactions
⦁ Configure business process security to support defined roles and tasks
⦁ Test and troubleshoot your business process to ensure they are functioning as designed
⦁ Manage and perform actions on business process events as an administrator
Calculated Fields - Learn Independent

Delivery Mode: Learn Independent
Audience: Integration Lead
Prerequisites: (Report Writer) OR (Report Writer - Learn Independent) OR (Report Writer - OSV) OR (Workday Reporting: Basics to Analytics) OR (Workday@College Report Writer - Learn Independent)

Library:
Description:
This Learn Independent course explores the capabilities of calculated fields in Workday. Calculated fields support many functions that enable you to format existing data as well as derive new values. You will learn how to create calculated fields that manipulate dates and text, evaluate conditions, work with data from related objects, and perform arithmetic calculations. Through a series of demonstrations and hands-on activities, you will learn how to add calculated fields to custom reports to meet complex business requirements. Calculated fields can also be used in outbound integrations to transform Workday data based on the requirements of external systems.

Covered Topics:
⦁ Capabilities of calculated fields
⦁ Security and performance considerations
⦁ Date and text functions
⦁ Conditional logic functions
⦁ Lookup functions
⦁ Mathematical functions
⦁ Change detection


Important: Calculated Fields is a prerequisite for several courses. Calculated Fields Learn Independent may not be taken concurrently with any of those courses. The course start date must be after the Learn Independent end date. If you need to complete a class in a short time period in order to register for a course that has Calculated Fields as a prerequisite, you may consider the Calculated Fields Learn Virtual Offering.

Important: Learn Independent training is completed online within the session dates. This course requires approximately 10 hours of work. Please note that additional time will NOT be allotted to complete work after the session ends. All course content must be completed by the end of the session to achieve a "Completed" status.

Learning Objectives:
⦁ Create calculated fields that manipulate dates and text, evaluate conditions, work with data from related objects, and perform arithmetic calculations.
⦁ Use a combination of calculated fields to solve complex business requirements.
⦁ Describe the security features that control access to calculated fields.
⦁ Explain the performance considerations when creating a calculated field.
Learn Independent Configurable Security Fundamentals - Learn Independent

Delivery Mode: Learn Independent
Audience: Workday Administrator

Prerequisites:

Library:

Description:
Workday provides a security framework that enables you to configure what a given user can see and do in the system. Through security group configurations, a user can navigate and access Workday-delivered items, such as reports, tasks, and the ability to participate in business process transactions. Through a series of demonstrations and hands-on activities, this Learn Independent course will introduce you to the fundamentals of security configuration and administration.

Covered Topics:
⦁ Configurable Security Framework
⦁ Domain Security Policies
⦁ Business Process Security Policies
⦁ Security Policy Activation and Change Control
⦁ Automatically-Assigned Security Groups
⦁ User-Based Security Groups
⦁ Role-Based Security Groups
⦁ Security Group Types and Use Cases
⦁ Security Maintenance and Reporting

Required Prerequisites: None

Recommended Prerequisites: It is recommended to attend the free Learn On-Demand offering, titled Organization and Security, prior to attending the Configurable Security Fundamentals course.

Important: Learn Independent training is completed online within the session dates. This course requires approximately 10 hours of work. Please note that additional time will NOT be allotted to complete work after the session ends. All course content must be completed by the end of the session to achieve a "Completed" status.

Important: Configurable Security Fundamentals is a prerequisite for our Advanced Configurable Security course offering. These courses may not be taken concurrently; if you are also interested in taking the Advanced Configurable Security course, the start date must be after Configurable Security Fundamentals - Learn Independent end date. If you need to complete Advanced Configurable Security in a short time period and also need to complete Configurable Security Fundamentals as a prerequisite, you may consider the Configurable Security Fundamentals Learn Virtual Offering.

Learning Objectives:
⦁ Describe the elements of the Configurable Security Framework.
⦁ Navigate and configure domain and business process security policies.
⦁ Match security groups types with appropriate use cases.
⦁ Create and assign unconstrained user-based security groups.
⦁ Create and deploy constrained role-based security groups for a variety of use cases.
⦁ Manage and troubleshoot security using delivered reports.
### Core Concepts - Learn Independent

**Delivery Mode:** Learn Independent  
**Audience:** Business User, Integration Lead, Workday Administrator, and Executive  
**Prerequisites:** None  
**Library:**  
**Description:**
Using conceptual videos and demonstrations, this course provides a high-level overview of Workday terminology and basic core concepts.  
Topics include:
- Navigation and search  
- Organizations  
- Business process framework  
- Configurable security  

### Creating and Maintaining Custom Organizations - Learn Independent Curriculum

**Delivery Mode:** Learn Independent  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:** (Core Concepts) OR (Core Concepts - Learn Independent) OR (Financials Fundamentals) OR (HCM Fundamentals)  
**Library:**  
**Description:**
The Creating and Maintaining Custom Organizations - Learn Independent is a self-paced training.  
This course explores the application and configuration of custom organizations, which can be used to group workers based on organization structures not provided by Workday. You will also learn how to maintain different types of organizations and enable roles to support those organizations. This course will require approximately 5 hours of work, and the assigned training tenant will be available for 7 days (168 hours).  
Topics include:
- Overview of organizations in Workday  
- Use cases for custom organizations  
- Configuring organization types and subtypes  
- Creating custom organizations  
- Assigning workers to organizations  
- Configuring support roles for custom organizations  

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.  
**Required Prerequisites:** (Core Concepts) OR (Core Concepts - Learn Independent) OR (Financials Fundamentals) OR (HCM Fundamentals)
Custom Scorecard - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Integration Lead
Prerequisites: (Report Writer) OR (Report Writer - Learn Independent)

Library:

Description:
The Custom Scorecard - Learn Independent is a self-paced training.

In this course, you will learn how to create Scorecards that provide a snapshot of your organization's health based on the metrics that matter most to your business. Using Workday-delivered HCM and Financial metric calculations, you will create key metrics such as Headcount, Turnover, Gross Profit, and Revenue per Employee. In addition, you will be able to gain further insight into the health of your business by configuring the Scorecard to include related information such as metric status, targets to track the metric against, and recommended actions. This course will require approximately 10 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

Covered Topics:
⦁ Scorecard Components
⦁ HCM Metric Calculations
⦁ Financial Metric Calculations
⦁ Metric Processing
⦁ Dashboard Configuration

Prerequisites: Report Writer or Report Writer - Learn Independent

Recommended Prerequisites: Advanced Reporting and Analytics.
For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

Expenses - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Business User, Implementer, and Managers and Employees
Prerequisites: (Core Concepts - Learn Independent) OR (Financials Fundamentals) OR (HCM Fundamentals)

Library:

Description:
The Expenses - Learn Independent is a self-paced training.

After completing this course, you will be able to perform setup of required data for the Expenses functional area. The training will detail how to configure the basic setup of expenses as well as advanced options such as credit card integration and travel booking setup. This course will require approximately 12 hours of work, and the assigned training tenant will be available for 10 days (240 hours).

Covered Topics:
⦁ Expense items
⦁ Accounting setup
⦁ Expense reports
⦁ Payment elections
⦁ Tax setup
⦁ Spend authorizations

Required Prerequisites: Workday Financial Fundamentals or HCM Fundamentals or Core Concepts - Learn Independent
For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Financial Accounting - Learn Independent Curriculum

**Delivery Mode:** Learn Independent  
**Audience:** Business User, Functional Lead, Workday Administrator, and Managers and Employees  
**Prerequisites:** (Core Concepts - Learn Independent) OR (Financial Services Overview - Learn Independent) OR (Financials Fundamentals)

**Library:**

**Description:** The Financial Accounting - Learn Independent is a self-paced training.  
Financial Accounting Learn Independent concentrates on the day-to-day as well as the month-end or year-end closing tasks that accountants perform in order to report financial results for their organizations. With a focus on Financial Accounting, the course covers how intercompany and multicurrency transactions are recorded, processing allocations, advanced consolidation and year-end balance roll forward. The class consists of video lecture, demonstrations, activities, and knowledge checks. This course will require approximately 20 hours of work, and the assigned training tenant will be available for 14 days (336 hours).

**Covered Topics:**  
- Configure and process intercompany transactions.  
- Configure multi-books.  
- Configure and process revaluations.  
- Configure and report Average Daily Balances.  
- Configure Alternate Account Sets for statutory reporting.

**Prerequisites:** Financial Fundamentals or Core Concepts - Learn Independent or Financial Services Overview - Learn Independent  
**Recommended Prerequisites:** None

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

Financial Budgets - Learn Independent Curriculum

**Delivery Mode:** Learn Independent  
**Audience:** Business User  
**Prerequisites:** Financials Fundamentals

**Library:**

**Description:** The Financial Budgets - Learn Independent is a self-paced training.  
This course is designed for finance professionals who have the basic Workday Financial Management knowledge and would like to gain a deeper knowledge of budgets. This class will enable you to obtain, clarify, and expand your knowledge of creating budgets in Workday. You will learn the general process of building and maintaining a budget and learn how to import budget data using Enterprise Information Builder (EIB). There are many different types of budgets in Workday. This course only covers financial budgets, although many of the topics presented will apply to all types of budgets. This course will require approximately 10 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

**Advanced budget-related topic:**  
- Amendments and approvals  
- Multi-currency  
- Budget checking

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

**Required Prerequisites:** Financials Fundamentals
Getting Started with Workday Touchpoints

Delivery Mode: Learn Independent
Audience: Business User, Functional Lead, Executive, and Implementer

Prerequisites:

Library:

Description:
This self-paced training helps prepare new and existing customers to make educated design and configuration decisions during initial and subsequent deployments of Workday. This training consists of a mixture of Learn on-Demand videos, expert interviews, and interactive exercises, which you can complete at your own pace. We start with the Workday foundation basics—organizations and worktags, configurable security, business process, and reporting and analytics—reviewing key product features and benefits, considerations for your initial and subsequent deployments, and how it all ties together. Next, we provide an overview of Workday tenant architecture and our release process. Finally, we demonstrate how to use the Workday Touchpoints Kit to identify touchpoints across the entire Workday product suite and understand the key design considerations at these touchpoints. You will hear from Workday experts across the ecosystem who will share their extensive field experience and you will have an opportunity to apply what you have learned in a range of scenarios. At the end of this training, there is a required multiple choice test to ensure you have the necessary knowledge to use the Workday Touchpoints Kit. You will be given 3 attempts to pass the test, and you must score at least 80% to pass.

Completion of this training will give you access to the Workday Touchpoints Kit on the Workday Community. Successful completion requires that all items in the training have been marked “complete” and that you pass the test with a score of at least 80%.

Covered Topics:
- Organizations and Worktags Basics
- Configurable Security Basics
- Business Process Framework Basics
- Reporting and Analytics Basics
- Mobile Overview
- Workday Tenants & The Release Process
- Workday Touchpoints Kit

Required Prerequisites: None;
Recommended Prerequisites: None

Please Note:
- As you progress through the curriculum, if you are not being marked complete after completing a video, please refresh your browser. In most cases this forces the system to recognize your completion.
- Access to the Workday Touchpoints Kit will only be granted once you have successfully completed all items in the training, including the test.
- Further information on how to access the Kit will be sent to you via email once the training has been completed.
- It will take up to 5 business days for your access to be processed.
- The “Workday Touchpoints Kit” section is included in all Workday Pro tracks. Completion of a Workday Pro track will also grant access to the Touchpoints Kit. Please view the Workday Pro FAQ for more information.

* * *
Learn Independent

Grants Management: Post Award - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Business User
Prerequisites: Financials Fundamentals

Library:

Description:
The Grants Management: Post Award - Learn Independent is a self-paced training.
Workday Grants Management is a modern grants management solution designed to enable you to manage the full operational lifecycle of your institution's grants process. At its core, Grants Management is a contract management application built on a cost accounting and billing engine, and provides you with the grant management tools to process all of your award transactions.

This course covers the post-award fundamentals of Workday Grants Management. It begins with a brief introduction and overview of Grants Management, followed by an in-depth look at how to configure Grants Management, and how to create and manage an award. This course will require approximately 16 hours of work, and the assigned training tenant will be available for 12 days (288 hours).

Covered Topics:
- Creating a Fund
- Creating a Sponsor
- Configuring Grants
- Configuring Facilities and Administration
- Creating Awards
- Revenue Recognition, Spend, Billing, and Collection for Cost Reimbursable awards
- Effort Certification
- Reporting

Required Prerequisites: Financials Fundamentals
For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
**HCM for Higher Education - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:** (HCM Fundamentals) OR (HCM Fundamentals - Learn Independent (Software Partners Only) Curriculum) OR (HCM Fundamentals - Learn Independent (Workday Employees Only) Curriculum)

**Library:**

**Description:**
Unlock the potential of the Workday Human Capital Management (HCM) higher education functionality! This learn independent course will focus on features designed specifically for higher education within Workday Human Capital Management (HCM). You will learn how to configure academic appointments, academic pay, and committees. You will also explore the configurations necessary to manage student employment from start to finish, including the external student record object, configuration of the Hire business process to hire students, and verification of student employment eligibility.

**Covered Topics:**
- Academic Staffing
- Academic Appointments
- Academic Pay
- Student Employment
- Employment Eligibility
- Hiring Students
- Committee Management

**Required Prerequisites:** HCM Fundamentals

This course requires approximately 8 hours of work to be completed over 7 days (168 hours).

**Objectives:**
- Configure academic appointments.
- Add academic appointments to faculty members.
- Configure academic pay.
- Define student employment eligibility rules.
- Configure the Hire business process to verify student employee eligibility.
- Create and manage committees.

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**HCM Transactions - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent  
**Audience:** Business User  
**Prerequisites:**

**Library:**

**Description:**

**The HCM Transactions - Learn Independent is a self-paced training.**
This course covers many basic transactions and discusses the steps and core concepts that drive those transactions. Through a series of demonstrations and hands-on activities, you will become more familiar with the Workday system and methods of navigation to efficiently execute business transactions. This course will require approximately 12 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

**Covered Topics:**
- Navigation
- Core Concepts
- Staffing Transactions
- Event Management
- Delegation
- For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

**Required Prerequisites:** None
Inventory - Learn Independent Curriculum

**Delivery Mode:** Learn Independent  
**Audience:** Implementer  
**Prerequisites:** (Core Concepts - Learn Independent) OR (Financials Fundamentals) OR (Procure-to-Pay Fundamentals) OR (Spend - Learn Independent)

**Library:** 
**Description:**
*The Inventory - Learn Independent is a self-paced training.*

This course provides you with an overview of Workday Inventory, and gives you a strong understanding of the inventory foundational components. After completing this course, you will be able to perform setup of required data for the Inventory functional area. The training details how to configure the basic setup of inventory locations, as well as providing practical examples of how to track and manage inventory. Additionally, the advanced topics include material movements, fulfillment, inventory costing and accounting, replenishment options, par inventory, counting, and reporting. This course will require approximately 14 hours of work, and the assigned training tenant will be available for 12 days (288 hours).

**Covered Topics:**
- Configure inventory system elements
- Track material movements
- Initiate fulfillment
- Generate inventory costing and accounting
- Manage stock replenishment
- Create par locations

**Prerequisites:** Financials Fundamentals, Procure-to-Pay, Spend - Learn Independent, or Core Concepts - Learn Independent

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

Open Enrollment - Learn Independent Curriculum

**Delivery Mode:** Learn Independent  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:**

**Library:** 
**Description:**
*The Open Enrollment - Learn Independent is self-paced training.*

This course will cover the configuration required to initiate, manage, and finalize the open enrollment process. This course will also cover basic benefits setup required to prepare for open enrollment. This course will require approximately 5 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

**Covered Topics:**
- Introduction to Open Enrollment
- Benefit Plan Configuration
- Event Configuration
- Enrollment Configuration Options
- Process Open Enrollment

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

**Required Prerequisites:** None
**Payroll Transactions - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent  
**Audience:** Functional Lead  
**Prerequisites:**  
**Library:**  
**Description:**  
**Payroll Transactions - Learn Independent is self-paced training.**  
Are you responsible for processing payroll transactions? Attend this 16-hour Learn Independent course to practice running and auditing payroll in Workday. In this hands-on training, you complete the payroll processing cycle, explore the payroll framework, and identify reports to validate your results. This course will be available for 12 days (288 hours) to complete.  
**Covered Topics:**  
- Navigation in Workday  
- Payroll process  
- Payroll framework  
- Net pay validation and arrears  
- Withholding orders  
- Banking and settlement  
- Off-cycle processing  
**Required Prerequisites:** None  
**Recommended Prerequisites:** Workday Core Concepts and practical knowledge of common payroll processes.  
We do not cover configuring Workday Payroll in this class. If you are a Workday payroll administrator or have a role in deploying Workday Payroll, consider the Payroll Fundamentals course instead.  
This course is approved for 6.5 Recertification Credit Hours (RCH) with the American Payroll Association.

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

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**Project Billing - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:** (Customer Accounts & Customer Contracts) OR (Projects - Learn Independent Curriculum)  
**Library:**  
**Description:**  
**The Project Billing - Learn Independent is a self-paced training.**  
This course will show you how to combine tasks from a Workday Project with the associated project costs to form an end-to-end billing process. The Projects course is a prerequisite to Projects Billing. You will have learned the basics of Workday Projects in the Projects course. This course, Project Billing, will expand on your knowledge of the Workday Projects solution above what was learned in Projects. This course will require approximately 7 hours of work, and the assigned training tenant will be available for 7 days (168 hours).  
**Covered Topics:**  
- Introduction to Billable Projects  
- Setup for Billable Projects  
- Billable Project Transactions  
- Performing Project Billing  
- Reporting and Analytics for Billable Projects  
**Prerequisites:** Projects - Learn Independent and Customer Accounts & Customer Contracts  
For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
**Learn Independent**

**Project Capitalization - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent

**Audience:** Business User, Functional Lead, and Workday Administrator

**Prerequisites:** (Financials Fundamentals) OR (Projects - Learn Independent Curriculum)

**Library:**

**Description:**
The Project Capitalization - Learn Independent is self-paced training.
This course will show you what is necessary to create and process a capital project in Workday. In some cases, the work completed in a project results in the creation of capital goods. Those goods could be software, a physical building and so on. Understanding how Workday processes capital projects is the purpose of this course. This course will require approximately 4 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

**Covered Topics:**
- Introduction to Capital Projects
- Setup for Capital Projects
- Capital Project Execution Tasks
- Additional Capital Project Tasks

**Required Prerequisites:** Financials Fundamentals and Projects - Learn Independent

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

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**Projects - Learn Independent Curriculum**

**Delivery Mode:** Learn Independent

**Audience:** Functional Lead and Workday Administrator

**Prerequisites:** (Core Concepts - Learn Independent) OR (Financials Fundamentals) OR (HCM Fundamentals)

**Library:**

**Description:**
The Projects - Learn Independent is a self-paced training.
This course is designed for customers who require in-depth knowledge of Workday Projects. The content in this class includes the core Projects functionality for managing your project work. This course will require approximately 15 hours of work, and the assigned training tenant will be available for 12 days (288 hours).

**Course Topics:**
- Introduction to Workday Projects
- Analyzing project metrics
- Resourcing projects
- Creating and managing a project
- Managing project costs
- Performing project transactions

**Prerequisite:** Core Concepts - Learn Independent, Financials Fundamentals, or HCM Fundamentals

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Report Administration - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Functional Lead and Workday Administrator

Library:

Description:

Report Administration - Learn Independent Curriculum
This scenario-based course is designed for experienced report writers responsible for managing reports for their organization. It focuses on topics such as report inventory, report monitoring, and report security to answer common questions including: How can I facilitate the finding of reports for end users? How can I notify report writers of unused reports? And, how can I see a custom report’s security requirements? By writing reports about reports, you can create tools to help you manage and optimize your organization’s reporting assets. This course includes overview and conceptual videos, interactive simulations highlighting key configuration requirements, and a configuration guide that provides the steps for you to deploy the solutions relevant to your organization in your live Workday environment. This course requires approximately four hours to complete.

Covered Topics:
⦁ Report inventory
⦁ Report monitoring
⦁ Report security and troubleshooting
⦁ Staffing change impacts on reports

Required Prerequisites: Report Writer
Recommended Prerequisites: Calculated Fields, Advanced Reporting and Analytics

Course Objectives:
⦁ Increase visibility of existing report definitions to provide users easy access to available reports and prevent the creation of unnecessary reports.
⦁ Implement proactive measures to identify and address potential issues related to performance and unused reports.
⦁ Mitigate and troubleshoot report security issues.
⦁ Identify custom report and scheduled report issues as staffing changes occur.
Learn Independent Report Writer - Learn Independent

Delivery Mode: Learn Independent
Audience: Integration Lead

Prerequisites:

Library:

Description:
This Learn Independent course introduces you to the Workday Report Writer tool. You will learn how to leverage Workday business objects and data sources to access the report data you need. Through a series of demonstrations and hands-on activities, you will learn how to build custom reports to meet business requirements from various functional areas. Custom reports allow you to analyze real-time data and can be used as the data source for outbound integrations. High level topics include:

⦁ Basic navigation and Report Writer terminology
⦁ Business objects and report data sources
⦁ Standard and custom reports (Advanced report type)
⦁ Introduction to matrix reports
⦁ Sorting, filtering, grouping, and totaling data
⦁ Scheduling reports
⦁ Introduction to calculated fields
⦁ Report access and security
⦁ Report performance

Prerequisites: Report Writer is a prerequisite for several courses. Report Writer Learn Independent may not be taken concurrently with any of those courses. The course start date must be after the Learn Independent end date. If you need to complete a class in a short time period in order to register for a course that has Report Writer as a prerequisite, you may consider the Report Writer Learn Virtual Offering.

Important: Learn Independent training is completed online within the session dates. This course requires approximately 15 hours of work. Please note that additional time will NOT be allotted to complete work after the session ends. All course content must be completed by the end of the session to achieve a "Completed" status.

Learning Objectives:

⦁ Create a custom report using the Advanced report type that filters, sorts, groups, and totals the data.
⦁ Create a basic matrix report that summarizes the data and uses drillable fields.
⦁ Use the tools in Workday to determine the appropriate business object and data source for a report.
⦁ Create a basic calculated field to display data from a related business object on a report.
⦁ Troubleshoot why a user cannot access a report or see certain data on the report.
⦁ Explain the performance considerations when creating a custom report.
Learn Independent

Revenue Transactions - Learn Independent Curriculum
Delivery Mode: Learn Independent
Audience: Business User
Prerequisites:
Library:
Description:
The Revenue Transactions - Learn Independent is a self-paced training.
This course is designed to teach you how to perform the most common Accounts Receivable-related transactions in your Workday Financials system. In this class, you will execute transactions that use Workday business processes. Some awareness of the underlying workings and configuration of Workday is provided, although kept to a minimum. This one-day course will consist of lecture and demonstrations made available via the recorded videos and individual hands-on activities. This course will require approximately 7 hours of work, and the assigned training tenant will be available for 7 days (168 hours).
Covered Topics:
⦁ Navigation and Core Concepts
⦁ Organizations and Worktags
⦁ Account Posting Rules
⦁ Customers
⦁ Customer Invoices
⦁ Customer Receipts
⦁ Customer Contracts
⦁ Collections
⦁ Reporting
For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Required Prerequisites: None

Spend Transactions - Learn Independent Curriculum
Delivery Mode: Learn Independent
Audience: Business User
Prerequisites:
Library:
Description:
The Spend Transactions - Learn Independent is a self-paced training.
This course is designed to teach you how to perform the most common Accounts Payable-related transactions in your Workday Financials system. In this class, you will execute transactions that use Workday business processes. Some awareness of the underlying workings and configuration of Workday is provided, although kept to a minimum. This one-day course will consist of lecture and demonstrations made available via the recorded videos and individual hands-on activities. This course will require approximately 4 hours of work, and the assigned training tenant will be available for 7 days (168 hours).
Covered Topics:
⦁ Navigation and Core Concepts
⦁ Organizations and Worktags
⦁ Account Posting Rules
⦁ Suppliers
⦁ Supplier Invoices
⦁ Settlement
⦁ Business Assets
⦁ Reporting
For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.
Required Prerequisites: None
Learn Independent

U.S. Year End Payroll Processing - Learn Independent

**Delivery Mode:** Learn Independent

**Audience:** Business User and Workday Administrator

**Prerequisites:**

**Library:**

**Description:**
This five-hour Learn Independent offering, for U.S. Payroll customers, will prepare you for year end processing by reviewing the year end checklist and completing payroll year end processing functions. We will review the steps needed to complete year end.

**Covered Topics:**
- Year end checklist
- Configuration for W-2s/W-2Cs
- North America year end dashboard and business process
- Printing opt out
- Auditing for year end
- Creating W-2 and W-2C data
- Creating and printing W-2s and W-2Cs
- Cancelling and reprinting W-2s and W-2Cs
- Completing year end adjustments
- Publishing W-2 & W-2C data
- Reviewing employee self-service (ESS) options
- Year end for US Territories

**Important:** Learn Independent training is completed online within the session dates. This course requires approximately 5 hours of work. Please note that additional time will NOT be allotted to complete work after the session ends. All course content must be completed by the end of the session to achieve a "Completed" status.

This course is approved for 2 Recertification Credit Hours (RCH) with the American Payroll Association.

**Required Prerequisites:** None

**Learning Objectives:**
- Complete year end checklist
- Configure W-2 Setup
- Configure North America year end dashboard
- Complete year end business process
- Opt out of printing
- Audit for year end
- Create W-2 and W-2C data
- Create and print W-2s and W-2Cs
- Cancel and reprint W-2s and W-2Cs
- Complete year end adjustments
- Publish W-2 & W-2C data
- Review employee self-service options
- Year end for US Territories overview
Using Workday to Implement New Revenue Recognition Standards - Learn Independent Curri

Delivery Mode: Learn Independent

Audience: Business User and Functional Lead

Prerequisites:

Library:

Description:
The Using Workday to Implement New Revenue Recognition Standards - Learn Independent is a self-paced training.

This course will help users of Workday more easily transition to the new ASC 606 accounting standards. This course will require approximately 5 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

- Provide an overview of the new revenue recognition changes
- Review the process behind Workday contracts and revenue recognition
- Work with usage- and subscription-based contracts
- Work with variable line types in contracts
- Link contracts
- Define alternate contracts
- Satisfy dual reporting requirements
- Perform the contract amendment process
- Perform multiple element revenue allocation
- Perform fair value revenue allocation
- Perform scenario modeling

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

Required Prerequisites: None
Workday Foundations - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Business User and Functional Lead

Prerequisites:

Library:

Description:

Workday Foundations - Learn Independent

Workday provides a unified solution to support your entire business. At the heart of Workday are foundational concepts and frameworks that are used across all solutions. In this course, you will learn about navigation, organizations, worktags, configurable security, business processes, reporting, analytics, and mobile functionality. Using conceptual videos, demonstrations, and hands-on activities, this course will enable you to work effectively within Workday and prepare you for more specialized courses. This course will be approximately 10 hours of course work that will be taken over a 7 day (168 hour) period.

Covered Topics:
- Organizations and Worktags
- Configurable Security
- Business Process Framework
- Reporting and Analytics
- Mobile Functionality

Objectives:
- Navigate Workday with an understanding of the business object model.
- Use organizations and worktags to meet your business requirements.
- Define the elements of the configurable security framework.
- Leverage business process configuration options.
- View your organization's data using reports and dashboards.
- Describe the Workday features available on mobile devices.

Required Prerequisites: None
## Workday Learning Fundamentals - Learn Independent

**Delivery Mode:** Learn Independent  
**Audience:** Workday Administrator  
**Prerequisites:** None

**Description:**
Workday Learning is Workday’s non-traditional answer to the traditional learning management system (LMS). This Learn Independent course focuses on Workday Learning’s Administrative functions and general use. In addition, it provides the tools to help customers use the robust functionality and access assistance in transforming their traditional Learning and Delivery organizations to a more fluid model. This learn independent course uses conceptual presentations, recorded demonstrations, hands-on activities, and knowledge checks to convey and affirm information. This course has approximately 20 hours of coursework.

**Required Prerequisites:** None

**Learning Objectives:**

### Topics:
- An overview of the key features and functionality
- Basic learning elements such as topics, lessons, courses, and surveys
- Advanced learning elements such as campaigns, mass enrollments, and waitlists
- Self-service functionality such as enrolling, dropping, commenting, and rating courses
- Dashboards, worklets, and sliders
- Instructor and Manager functionality
- Basic Media Management Guidelines (high-level only)
- Basic security elements (high-level only)
- Peer-learning options and resources
- Standard learning-focused reports and additional support resources
Worker Trending - Learn Independent Curriculum

Delivery Mode: Learn Independent
Audience: Integration Lead and Functional Lead
Prerequisites: (HCM Fundamentals) OR (Report Writer) OR (Report Writer - Learn Independent)
Library:

Description:
The Worker Trending - Learn Independent is a self-paced training.
Workday HCM offers the capabilities of an HCM data warehouse via the Trended Workers data source. By tapping into this resource, you can report on snapshots of worker data from prior periods and track metrics such as hires and terminations over a period of time. This course will cover the features of the Trended Workers data source, requirements for enabling worker trending, and configuration steps for calculating additional metrics such as turnover rate and span of control. Upon completion of this training, participants will be able to use trended data to perform time series analysis of worker data. This course will require approximately 6 hours of work, and the assigned training tenant will be available for 7 days (168 hours).

Covered Topics:
- Trended Workers data source
- Tenant configuration
- Workday-delivered trending reports
- Metrics and calculations
- Worklets and dashboards
- Trending for other use cases

Required Prerequisites: Report Writer

Recommended Prerequisites: Advanced Reporting and Analytics

For more information about registering for Learn Independent courses, please visit the Learn Independent Registration Instructions page.

Absence Management Overview (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites:
Library: Free Library and Payroll/Absence/Time Tracking Library

Description:
In this course, we’ll provide an overview of Workday’s Absence Management solution. You’ll learn how workers request an absence event, as well as how Workday’s reporting capability, configurable business process framework and calculation engine drive absence functionality. You’ll also gain insight into how Absence Management intersects with other Workday product areas, such as Payroll, Time Tracking, and Projects to create a unified solution.

Covered Topics:
- Absence Management Overview
- Request Absence
- Time and Absence Manager Dashboard
- Absence Calculation Engine and Eligibility Rules
- Touchpoints

Required Prerequisites: None
**Absence Management: Adjusting and Overriding Accruals (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
Accrual adjustments allow you to add to or subtract from an employee's standard accrual, while overrides are used to replace the standard accrual calculation. This training introduces common use cases and explains the prerequisites. Upon completion of this curriculum, you will be able to enter an accrual adjustment and an accrual override. This training also demonstrates how to adjust or override an accrual for which an employee is not eligible.  
**Covered Topics:**  
- Overview of Accrual Adjustments and Overrides  
- Enter and Verify an Accrual Adjustment  
- Enter and Verify an Accrual Override  
- Modify Accruals for Employees without Eligibility  
- Important Considerations for Accrual Modifications

**Absence Management: Building a Leave Type (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
This video will define leaves of absence and describe the important components that make up their configuration. It will then walk you through the process of setting up a leave of absence and show you how to test your configuration.  
**Covered Topics:**  
- Differentiating Between Time Off and Leave  
- Leave Types Overview  
- Building and Configuring a Leave Type  
**Required Prerequisites:** None

**Absence Management: Building a Time Off Plan (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library and Payroll/Absence/Time Tracking Library  
**Description:**  
This course contains one job aid and three demonstrations that take you through the process of building a time off plan. In this training, you will learn the key differences between Time Off and Leave, gain insight into Time Off Plan prerequisites, learn how to create a Calculation, an Accrual, and a Time Off, in order to configure a unique Time Off Plan, and then view the end results of your configured plan.  
**Covered Topics:**  
- Differentiating Between Time Off and Leave  
- Time Off Plan Prerequisites  
- Generate Time Off Plan  
- Time Off Plan Requirement End Result
Absence Management: Configurable Balance Calendar for Employee Leave of Absence (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library and Payroll/Absence/Time Tracking Library  
**Description:**  
This course will provide training around the Configurable Leave Balance Calendar as it relates to the setting up your leaves of absence. You'll learn how the Leave Balance Calendar Start and End Date fields operate and drive the Balance Calendar.  
**Covered Topics:**  
- Understanding a Balance Calendar  
- Configuring a Leave Balance Calendar-Demonstrations  
**Required Prerequisites:** None

Absence Management: Configuring Absence Tiers (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator, Implementer, Internal, and Managers and Employees  
**Prerequisites:**  
**Library:** HCM Core Library and Payroll/Absence/Time Tracking Library  
**Description:**  
In this 17-minute Learn on-Demand Course, you'll see how to use and configure absence tiers and absence tier validations. You'll also learn how to enable absence event re-evaluation and review how the re-evaluation of absence events affects their processing.  
**Covered Topics:**  
- Using Absence Tiers  
- Configuring Absence Tiers  
- Processing Absence Events with Absence Tiers  
- Using Absence Tier Validations  
- Configuring Absence Tier Validations and Processing Absence Events Using Absence Tier Validations  
- Absence Event Re-Evaluation Overview  
- Enabling Re-Evaluation for Absence Events and Processing Absence Events Using the Re-Evaluation Option  
**Required Prerequisites:** None  
**Recommended Prerequisites:**  
- Absence Management: Building a Time Off Plan  
- Absence Management: Configuration and Administration
Learn On-Demand

Absence Management: Configuring Team Absence (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library and Payroll/Absence/Time Tracking Library
Description:
This training will introduce you to the team absence feature in Workday. We'll demonstrate how to access and view the team absence feature from both the manager self-service (MSS) and employee self-service (ESS) perspective. We'll also review the steps in how to configure team absence.
Covered Topics:
⦁ Team Absence Overview
⦁ View Team Absence in MSS
⦁ Configure Team Absence for MSS
⦁ View Team Absence in ESS
⦁ Configure Team Absence for ESS
Required Prerequisites: None

Absence Management: Coordinated Leaves of Absence (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library and Payroll/Absence/Time Tracking Library
Description:
This course will cover the purpose and appropriate configuration of coordinated leaves of absence.
Required Prerequisites: None

Absence Management: Evaluate Absence Eligibility (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator, Implementer, and Managers and Employees
Prerequisites:
Library: Payroll/Absence/Time Tracking Library
Description:
In this six-minute Learn on-Demand course, you’ll see how Workday evaluates absence eligibility and how to use the Evaluate Absence Eligibility report to test absence eligibility.
Covered Topics:
⦁ Evaluating Absence Eligibility
⦁ Using the Evaluate Absence Eligibility Report
Required Prerequisites: none
Recommended Prerequisites:
⦁ Absence Management: Configuration and Administration
⦁ Absence Management: Building a Time Off Plan
Absence Management: Overriding Time Off Plan Balances (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: Payroll/Absence/Time Tracking Library

Description:
This training explains how time off plan overrides can be used to replace the calculated balance for a time off plan. It outlines the prerequisites and also includes important considerations regarding overrides. Upon completion of this training, you will be able to enter an override and verify that it has been successfully executed.

Covered Topics:
⦁ Override Balances: Use Cases
⦁ Enter and Verify an Override

Absence Management: Termination Process (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: Payroll/Absence/Time Tracking Library

Description:
Would you like to minimize the amount of time spent paying out time off balances for terminated employees? Discover how to configure the termination business process and time off plans to zero out balances. In addition to this function, the termination adjustment process automatically accounts for changes made to the time off after the adjustment has been created.

Covered Topics:
⦁ Termination Process Tasks and Considerations
⦁ Termination Adjustment Results
Required Prerequisites: None

Absence Management: Transferring Time Off Plan Balances (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: Payroll/Absence/Time Tracking Library

Description:
This training reviews the process of transferring an employee’s balance from one time off plan to another as part of a staffing movement.

Covered topics:
⦁ Explain when to transfer a balance from one time off plan to another
⦁ Configure Change Job business process for balance transfer
⦁ Configure a Unit of Time Conversion Calculation
⦁ Update a time off request
⦁ Execute a balance transfer between time off plans
⦁ View the results of a balance transfer
Required Prerequisites: None
## Absence Report Data Sources and Reporting Tips

<table>
<thead>
<tr>
<th>Delivery Mode:</th>
<th>Learn On-Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience:</td>
<td>Business User, Integration Lead, Functional Lead, and Workday Administrator</td>
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<tr>
<td>Prerequisites:</td>
<td></td>
</tr>
<tr>
<td>Library:</td>
<td>Payroll/Absence/Time Tracking Library</td>
</tr>
<tr>
<td>Description:</td>
<td>Gain an understanding of Absence reporting with this job aid. This training discusses the delivered Xpresso and standard reports for Time Off and Leave of Absence information. Additional reports and data sources have also been provided for reporting on setup data.</td>
</tr>
<tr>
<td>Required Prerequisites:</td>
<td>None</td>
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</tbody>
</table>

## Academic Affiliate Appointees (Subscription)

<table>
<thead>
<tr>
<th>Delivery Mode:</th>
<th>Learn On-Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience:</td>
<td>Integration Lead, Functional Lead, and Workday Administrator</td>
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<tr>
<td>Prerequisites:</td>
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<tr>
<td>Library:</td>
<td>Education/Government Library</td>
</tr>
<tr>
<td>Description:</td>
<td>Academic Affiliates give you the ability to track appointments for workers that do not have an employment relationship with your institution. This series will look at the core functionality of academic affiliates.</td>
</tr>
<tr>
<td>Covered Topics:</td>
<td></td>
</tr>
</tbody>
</table>
 ⦁ Introduction to Workday Academic Affiliate  
 ⦁ Add, Update, and End an Affiliate Appointment  
 ⦁ Affiliate Reporting |
| Required Prerequisites: | None |

## Academic Appointments: Configure (Subscription)

<table>
<thead>
<tr>
<th>Delivery Mode:</th>
<th>Learn On-Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience:</td>
<td>Integration Lead, Functional Lead, and Workday Administrator</td>
</tr>
<tr>
<td>Prerequisites:</td>
<td></td>
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<tr>
<td>Library:</td>
<td>Education/Government Library and HCM Core Library</td>
</tr>
<tr>
<td>Description:</td>
<td>Academic Appointments allow you to track an academic employee’s time at your University. This training covers how to configure academic appointments for your institution. This curriculum consists of one presentation and two demonstrations.</td>
</tr>
<tr>
<td>Covered Topics:</td>
<td></td>
</tr>
</tbody>
</table>
 ⦁ Academic Appointments Overview  
 ⦁ Academic Appointments Configurations  
 ⦁ Academic Units and Unit Hierarchies Configurations |
| Required Prerequisites: | None |
Academic Appointments: Manage (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library and HCM Core Library  
**Description:**  
Academic Appointments allow you to track an academic employee's time at your University. This training covers how to manage academic appointments for your institution post go-live. This curriculum consists of four demonstrations.  

Covered Topics:  
- Add Academic Appointments  
- Update Academic Appointments  
- End Academic Appointment Track  
- Academic Appointments Reports  

**Required Prerequisites:** None

Academic Pay: Configure (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library  
**Description:**  
In this training, we will review how to configure the payment of employees who receive annual salaries, yet work fewer than 12 months in a year. This curriculum consists of one overview presentation and 4 demonstrations.  

Covered Topics:  
- Academic Pay Overview  
- Academic Pay Periods  
- Academic Pay Eligibility  
- Academic Pay Compensation and Earnings  
- Academic Pay FTE Dimensions  

**Required Prerequisites:** None

Academic Pay: Manage (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Education/Government Library and HCM Core Library  
**Description:**  
In this training, we will review how to manage the payment of employees who receive annual salaries, yet work fewer than 12 months in a year. We will assign Academic Pay on a hiring event and look at Academic Pay reports. This curriculum consists of 2 demonstrations.  

Covered Topics:  
- Assign Academic Pay  
- Access Academic Pay Reports  

**Required Prerequisites:** None
Adding Reports to a Business Process (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Workday Administrator

**Prerequisites:**

**Library:** HCM Core Library

**Description:**
In this course, you will learn how to add reports to a business process to make your business run more effectively and efficiently.

**Covered topics:**

- Editing Business Processes
- Adding a Report
- Adding a To Do
- Configuring a Report Step
- Running a Business Process

**Required Prerequisites:** None

Additional HCM Organizations (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Workday Administrator and Implementer

**Prerequisites:**

**Library:** Financials Library and HCM Core Library

**Description:**
After viewing this course, you’ll be able to identify other types of organizations used in Workday, explain what a location is and create one, define and create a custom organization, explain organization assignments, and demonstrate how to change organization assignments.

**Covered topics:**

- Identify other types of organizations used in Workday.
- Explain what a location is and create one.
- Define and create a custom organization.
- Explain organization assignments.
- Demonstrate how to change organization assignments.

**Required Prerequisites:** None
Adobe Sign (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: Cross Application/Technology Library  

Description: Sign documents securely in the cloud using Adobe Sign integration.  
Covered Topics:  
⦁ Adobe Sign Overview  
⦁ Edit Tenant Setup Configuration  
⦁ Configuring Document Step  
⦁ Run and Test Results  

Required Prerequisites: None

Advanced Competency Management (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Integration Lead, Functional Lead, and Workday Administrator  
Prerequisites:  
Library: HCM Core Library  

Description: This course presents an overview of the Advanced Competency Management functionality delivered in Workday. Advanced Competency Management covers a broad range of enhancements supporting frameworks from third party vendors, and enables both simple and advanced competency models as required by large, multi-national organizations.  
Covered topics:  
⦁ Competency Classes & Categories  
⦁ Proficiency Rating Scales  
⦁ Level-based Behavioral Indicators  
⦁ Employee Review Integration  

Required Prerequisites: None

Advanced Report Writer: Analytic Indicator Overview (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: Cross Application/Technology Library  

Description: Do you have a passion for Business Intelligence? Do you want to learn how to make your reports more interesting and easier to comprehend? Analytic indicators are used in Workday to visually categorize and illustrate data, indicate status, display ratings, and monitor thresholds. This training will cover the various indicators that are available to you, and provide the steps to set up your own indicators using real world examples.  
Covered topics:  
⦁ Configuring an analytic indicator  
⦁ Analytic Indicator Overview  

Required Prerequisites: None
**Advanced Report Writer: Creating Alerts Using Standard Reports (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Cross Application/Technology Library  
**Description:**  
This Advanced Report Writer curriculum will demonstrate how to create alerts and notifications from Workday standard reports.  
**Covered topics:**  
- Alerts and notifications  
- Configuring prompt defaults  
- Configuring alerts  

**Required Prerequisites:** None

---

**Advanced Report Writer: Creating Custom Worklets (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Cross Application/Technology Library  
**Description:**  
A worklet is a report that can be displayed in a "tile" on Workday home pages and provides quick access to frequently referenced data and tasks. As a tiny custom report, they are a convenient way to share information within your organization. This course is designed for Workday users who wish to create custom reports for distribution as worklets.  
Completion of the Workday Report Writer Overview is strongly recommended.  
**Covered topics:**  
- Build a Custom Report  
- Deploy a Custom Worklet  

**Required Prerequisites:** None

---

**Advanced Report Writer: Filters and Multi Value Fields (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Cross Application/Technology Library  
**Description:**  
This course covers advanced Workday Report Writer topics related to the use of objects and multi-instance fields, demonstrating how filter operators can be used with various Class Report Fields.  
**Covered topics:**  
- Report Objects  
- Multi-value fields  
- Using filters in reports  

**Required Prerequisites:** None
Advanced Report Writer: Report Scheduling (Subscription)

Delivery Mode:        Learn On-Demand
Audience:             Workday Administrator
Prerequisites:        None
Library:              Cross Application/Technology Library

Description:
Report scheduling is a powerful productivity tool that employs Workday's background processing to run and store reports on the W: Drive. This curriculum will teach you to use the W: Drive to manage all your Workday and custom reports.

Covered topics:
- Reports and the W: drive
- Report scheduling
- Using data variables
- Accessing report output

Required Prerequisites: None

Advanced Report Writer: Sharing and Security (Subscription)

Delivery Mode:        Learn On-Demand
Audience:             Workday Administrator
Prerequisites:        None
Library:              Cross Application/Technology Library

Description:
All reports created in Report Writer inherit powerful Workday security. By default, a custom report is visible only to its owner. You can choose to share your report with other Workday users, and then anyone meeting your sharing criteria will have access to your report.

Covered topics:
- Sharing and Data Source Security Basics
- Sharing and Security Within Reports

Required Prerequisites: None

Advanced Report Writer: Web Services (Subscription)

Delivery Mode:        Learn On-Demand
Audience:             Workday Administrator
Prerequisites:        None
Library:              Cross Application/Technology Library

Description:
Want to create custom reports and expose those reports to applications outside of the Workday system? This presentation will demonstrate how to publish a custom report as a web service. Designed for Workday users who wish to create custom reports and expose those reports to applications outside of the core Workday system. Completion of the Workday Report Writer Overview is strongly recommended.

Covered topics:
- Web services basics
- Expose the REST URL
- Access a URL
- Objects and Instance IDs

Required Prerequisites: None
# Application Cohorts and Pools (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead and Functional Lead  
**Prerequisites:**  
**Library:** Education/Government Library  

**Description:**  
Admissions Cohorts and Application Pools are used in Workday to ease application processing by grouping and organizing applications among admissions counselors.  

**Covered Topics:**  
- Admissions Cohorts, Application Pools, and Eligibility Rules Overview  
- Create Admissions Cohorts  
- Create Application Pools and Assign Eligibility Rules  

**Required Prerequisites:** None

---

# Application Requirements (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead  
**Prerequisites:**  
**Library:** Education/Government Library  

**Description:**  
Application Requirements allow you to indicate additional items that must be submitted in order to complete an application for a particular Academic Unit, level, and date range.  

In this course, we'll provide an overview for Application Requirements, and show how they are used in Workday. In addition, we'll cover how to create Engagement Action Items and Eligibility Rules for Application Requirements, and how to automatically and manually complete or waive requirements. Finally, how to create Ad Hoc Application Requirements.  

**Required Prerequisites:** None

---

# Asset Books (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User and Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  

**Description:**  
Asset Books are necessary to generate accurate asset accounting. In this course, you will learn how to create and maintain asset books in Workday.  

**Covered Topics:**  
- Asset Book Overview  
- Create and add an Asset Book to a Company  
- Set up a Depreciation Profile  
- Create a Spend Category  
- Maintain Asset Book Rules  
- Editing Account Posting Rules  
- Maintain spend categories  
- Pulling it all together  

**Required Prerequisites:** None
<table>
<thead>
<tr>
<th>Topic</th>
<th>Delivery Mode:</th>
<th>Audience:</th>
<th>Prerequisites:</th>
<th>Library:</th>
<th>Description:</th>
<th>Required Prerequisites:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Tracking Lifecycle Events and Reports (Subscription)</td>
<td>Learn On-Demand</td>
<td>Business User and Workday Administrator</td>
<td></td>
<td>Financials Library</td>
<td>In this job aid, you will learn how to assign the role of Business Asset Tracking Specialist to a worker. You will also learn about the four main events in the life cycle of an asset, and what reports you can use in Workday to track assets.</td>
<td>None</td>
</tr>
<tr>
<td>Asset Tracking Overview (Free)</td>
<td>Learn On-Demand</td>
<td>Integration Lead, Functional Lead, Workday Administrator, and Executive</td>
<td></td>
<td>Financials Library and Free Library</td>
<td>Workday has a unique view on Business Assets where the business asset accounting is separate from the business asset tracking. Whether the asset is a zero cost item or an item that is of substantial in value, Workday provides the ability to physically track an asset. In this course you will learn about Business Assets Tracking, how to configure, and how it is used in business.</td>
<td>None</td>
</tr>
<tr>
<td>Benefits for Workers on International Assignment (Subscription)</td>
<td>Learn On-Demand</td>
<td>Workday Administrator</td>
<td></td>
<td>HCM Core Library</td>
<td>This Job Aid will discuss how to assign an additional job or international assignment to employees and how they can enroll in benefit plans, while on an international assignment.</td>
<td>None</td>
</tr>
</tbody>
</table>
Benefits: Benefit Eligibility Rules for Passive Events (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: HCM Core Library  
Description:  
This training will discuss Benefit Plans and Eligibility Rules.  
Covered Topics:  
⦁ Benefit Eligibility Rules Overview  
⦁ Create a Benefit Eligibility Rule  
⦁ Create a Benefit Plan and Edit Plan Definition  
Required Prerequisites: None

Benefits: Coordination of Events (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: HCM Core Library  
Description:  
How does Workday process multiple benefit events for one employee? This course will explain the logic behind coordination of events, detailing several common scenarios. You will learn how events entered on separate dates are processed differently depending on coverage type and the order in which they were submitted. You will learn how a hybrid event is created, and finally, the implications associated with preventing events from being reprocessed.  
Covered Topics:  
⦁ Two Events, Different Dates  
⦁ Do Not Reprocess Options  
⦁ Hybrid Events  
Required Prerequisites: None

Benefits: Dependent Event Configuration (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: HCM Core Library  
Description:  
In this course, we'll discuss Dependent Event configuration. We'll review how the Dependent Event Business Process works, how to setup security for the Business Process, and leverage the Change Benefit Elections sub-process. Using the Dependent Event business process, we'll show how to add a dependent to an employee's list of eligible dependents.  
Required Prerequisites: None
Learn On-Demand

Benefits: Open Enrollment Checklist (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library

Description:
This Job Aid is designed to assist Benefits professionals with the set up and deployment of Open Enrollment in the Workday system. We will review and discuss what you need to consider as you prepare for open enrollment in the coming benefit plan year.

Covered topics:
• Benefits: Open Enrollment Checklist

Required Prerequisites: None

Benefits: Open Enrollment Processing (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library

Description:
This Job Aid is designed to assist Benefits professionals with the set up and deployment of Open Enrollment in the Workday system. It provides detailed information on the multiple tasks that comprise the Open Enrollment process, with the assumption that your benefit plans, plan year definitions and open enrollment events have been setup in your Workday system.

Covered Topics:
• Review of the Open Enrollment Process
• Security Considerations
• Managing Enrollments
• Close and Finalize Open Enrollments
• Ability to Extend Open Enrollment

Audience: Benefits Team, Partners, Benefits Business Analysts, Workday Administrators

Required Prerequisites: None

Benefits: Passive Events Enrollment Events (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library

Description:
This training discusses enrollment event types, benefit event types and enrollment event rules.

Covered Topics:
• Passive Events Enrollment Events
• Create a Benefit Event Type
• Edit an Enrollment Event Rule

Required Prerequisites: None
### Benefits: Passive Events Introduction (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:**  
This course is designed to assist Benefits professionals with an overview of passive events. Designed for anyone with broad responsibility for Workday Benefits. General familiarity with Workday navigation is recommended.  
**Covered Topics:**  
- What is a Passive Event?  
- Business Process for Passive Event  
- Who can do what?  
- Steps to Set Up and Schedule a Passive Event  
**Required Prerequisites:** None

### Benefits: Passive Events Rules (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This course will review how to create Passive Event Rules, and how to schedule a Passive Event.  
**Covered Topics:**  
- Create a Passive Event Rule  
- Schedule a Passive Event  
**Required Prerequisites:** None

### Bonus Plan and Bonus Process (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
In this training, we'll review the configurable components of a bonus plan, learn how to create a bonus plan, and discuss the bonus process at a high level.  
**Covered Topics:**  
- Overview of Advanced Compensation Component  
- Compensation Matrix  
- Time Proration Rule and Eligibility Waiting Period  
- Scorecards and Modifiers  
- Create a Bonus Plan  
- Processing a Bonus Event  
**Required Prerequisites:** None
The Budget to Actuals Report Data Source can help you to keep track of your commitments, obligations, and remaining budget. Learn how to use the Budget to Actuals RDS to create custom reports using Report Writer.

Covered Topics:
- Manager Budgetary Balance Report
- Budget to Actuals RDS
- Creating Custom Budget to Actuals Reports in Report Writer

Required Prerequisites: None

Do you want to learn more about tools that can help you to manage your budget? Find out how the Check Budget business process controls spending on procurement and payroll in your organization.

Covered topics:
- Use cases for budgetary control
- Accounting
- Ledger setup
- Business process configurations
- Budget check options

Required Prerequisites: None

Are you looking for tools to help you control procurement costs? Budgetary Control for Procurement will show you how to use the Check Budget business with Workday Procurement to manage spend.

Covered Topics:
- Commitment Accounting in Procurement
- Budget Check Warnings
- Check Budget Business Processes

Required Prerequisites: None
Learn On-Demand

Budgets with Amendments and Approvals (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Financials Library
Description:
This presentation will discuss using budgets with amendments and approvals.
Covered Topics:
● Creating a Budget Structure
● Submitting a Budget
● Creating a Budget Amendment
● Viewing Budget Reports
● Finding Budget Amendments
Required Prerequisites: None

Budgets without Amendments and Approvals (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Financials Library
Description:
This presentation will discuss how to create a budget that will not require amendments and approvals.
Covered Topics:
● Budget Overview
● Demonstrate how to create and edit a budget structure
● Demonstrate how to create a budget template
● Budget restrictions
Required Prerequisites: None

Building Calculations Using the Calculation Engine (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
The calculation engine is a powerful in-system utility used to derive various Payroll and Absence related values such as hourly rates and accruals in Workday.
This video will introduce you to the power of the calculation engine and walk you through the creation and configuration of calculations in Payroll and Absence Management.
Required Prerequisites: None
Learn On-Demand

Business Assets Overview (Free)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator and Executive  
Prerequisites:  
Library: Financials Library and Free Library  
Description:  
In this curriculum, we'll look at how Workday can help you to manage your organization's assets. We've also included a list of all of the training available on Assets in Workday.  
Covered topics:  
⦁ Asset Books  
⦁ Asset Registration  
⦁ Pooled Assets  
⦁ Composite Assets  
⦁ Asset Lifecycles  
⦁ Roles  
⦁ View Assets  
Required Prerequisites: None

Business Process Event: Understanding the Full Process Record (Free)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites: 
Library: Free Library and HCM Core Library  
Description:  
Have you experienced a business process event that stalled unexpectedly? Or found that a Workfeed task or e-mail notification was not received? Learn how to troubleshoot these common issues using the Full Process Record of a Business Process Event. The Full Process Record provides helpful information by automatically tracking all activities related to the execution of a business process. This training will teach you how to interpret it effectively.  
Covered Topics:  
⦁ Locating a Business Process Event and the Full Process Record  
⦁ Troubleshooting with the Full Process Record  
Required Prerequisites: None
**Business Process Overview (Free)**

**Delivery Mode:** Learn On-Demand

**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive

**Prerequisites:**

**Library:** Free Library and HCM Core Library

**Description:**
A business process is the definition of business tasks that need to be performed in order for an event to occur, the sequence in which they must be done, and who must do them. This course covers what business process definitions are, and how to locate and edit them. In addition, this course reviews how to add condition rules and notifications to a business process. This training is designed for anyone with responsibility for Workday configuration, such as managers, system implementers and project team leaders active in Workday implementations.

**Covered Topics:**
- Business Process Definitions
- Locate and Edit Business Process Definitions
- Create Business Process Condition Rules
- Add Notifications to a Business Process

**Required Prerequisites:** None

---

**Business Process Step Types and Actions (Subscription)**

**Delivery Mode:** Learn On-Demand

**Audience:** Business User, Integration Lead, Functional Lead, Workday Administrator, Executive, Implementer, and Internal

**Prerequisites:**

**Library:** Cross Application/Technology Library

**Description:**
This job aid will provide a more in depth look into Workday's Business Process functionalities. Additionally, this title will provide an overview of the actions you can take within the system's business processes using examples from FIN and HCM.

**Covered topics:**
- Business Process Step Types
- Business Process Actions

**Required Prerequisites:** None

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**Calibration Within a Performance Review (Subscription)**

**Delivery Mode:** Learn On-Demand

**Audience:** Integration Lead, Functional Lead, and Workday Administrator

**Prerequisites:**

**Library:** HCM Core Library

**Description:**
This online training reviews the steps involved in launching a performance calibration with the Performance Review process and covers the following details:

**Covered topics:**
- Creating and Setting up an nBox report
- Creating a Calibration Program
- Modifying the necessary Business Processes
- A demonstration of the entire end-to-end process

**Required Prerequisites:** None
## Cash Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library and Free Library  
**Description:**
In this presentation, we'll look at how Workday can help you to manage your organization's cash. We've also included a list of all of the training available on cash in Workday.  
**Covered topics:**
- Cash Management  
- Trainings Available  
**Required Prerequisites:** None

## Cash Sales (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Implementer, Internal, and Managers and Employees  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**
In Workday, sales events and transactions are processed through customer invoices. However, you can record a sale without an invoice by using a cash sale. In this course, you'll learn how to record a cash sale, and process related tasks in Workday.  
**Covered Topics:**
- Record a cash sale  
- Cancel a cash sale  
- Deposit a cash sale payment  
**Required Prerequisites:** None

## Cloud Connect for Benefits: Launch Parameters (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**
Cloud Connect for Benefits (CCB) is a collection of pre-built integrations to benefit providers, built using templates based specifically on each vendor's requirements. Data that includes benefit events is typically sent to providers on a predefined schedule. To correctly set up a schedule for passing data, it is important to understand how the launch parameters drive integration results.  
**Covered Topics:**
- Understanding Launch Parameters  
- CCB Date Parameters and Benefit Events  
**Required Prerequisites:** None
## Commitment Accounting (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library  
**Description:** This presentation will introduce you to the Commitment Accounting process. In this training you will learn how to configure Workday for Commitment Accounting, including defining commitment rules, running initial commitments, and adjusting commitments.  
**Covered Topics:**  
- Commitment Accounting Overview  
- Commitment Accounting  
**Required Prerequisites:** None

## Commodity Code Classification (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library and Financials Library  
**Description:** This job aid cover how Commodity Codes are used within the Workday system.  
**Covered Topics:**  
- Set up Spend Categories and Suppliers  
- Processing Requisitions  
**Required Prerequisites:** None

## Commodity Code Classification Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Financials Library and Free Library  
**Description:** This presentation provides an overview of how Commodity Codes are used within Workday.  
**Covered Topics:**  
- Spend Analytics  
- Commodity Code Taxonomy  
- UN/SPSC Code Structure  
- Spend Category Hierarchy  
**Required Prerequisites:** None
Composite Assets (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library

**Description:**
Find out how assets can be grouped and treated as one asset on your register.

**Covered Topics:**
- Registering Composite Assets
- Discrete and Non-Discrete Lifecycles
- Searching for Assets to Bundle
- Creating Composite Assets

**Required Prerequisites:** None

Configurable Security Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive

**Prerequisites:**
**Library:** Cross Application/Technology Library and Free Library

**Description:**
In this demonstration you will learn where to find information about configurable security, including domains, business processes, and functional areas.

**Covered topics:**
- Functional Areas
- Domains
- Business Process Security Policy

**Required Prerequisites:** None

Configurable Security: Service Centers (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**
**Library:** Cross Application/Technology Library

**Description:**
In this course, you will learn about the Workday enabled configurable security group, Service Centers. Service Centers allow your organization to grant third-party contracted organizations, access to your organization's Workday system, without allowing the representatives to view sensitive and personal data. This ODE should act as a refresher course for users who are familiar with configurable security.

**Covered Topics:**
- Service Center Overview
- Create Service Centers and Representatives
- Configure Service Center Security
- Define the Service Center Manager Role
- Activate and Test Security Policy Changes

**Required Prerequisites:** None
Configuring and Maintaining Establishments (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: HCM Core Library  
Description:  
This course explains what establishments are and how they support compliance. This course demonstrates how to configure and maintain establishments and assign establishments to workers.  
Covered Topics  
⦁ Establishments Overview  
⦁ Configure Establishments by Country  
⦁ Maintain Establishments  
⦁ Assign Workers to Establishments  
Required Prerequisites: None

Configuring Guided Tours (Free)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: Cross Application/Technology Library and Free Library  
Description:  
This training reviews how to view, configure and translate guided tours.  
Covered topics:  
View a guided tour  
Configure a guided tour  
Translate a guided tour  
Best practices for guided tours  
Required Prerequisites: None

Configuring Workday Expenses: Accounting and Banking Setup (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: Financials Library, HCM Core Library, and Payroll/Absence/Time Tracking Library  
Description:  
In this training, we'll discuss the following topics:  
⦁ Account Sets, Ledger Accounts, and Posting Rules  
⦁ Configuring Bank Account Set Up and Routing Rules  
⦁ Reviewing Payment Elections  
Required Prerequisites: None
Learn On-Demand

Configuring Workday Expenses: Cost Controls (Subscription)
Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: 
Library: Financials Library and HCM Core Library
Description: This demonstration will discuss managing cost controls within Workday.
Covered Topics:
⦁ Cost controls
⦁ Validation Rules
⦁ Business Processes
⦁ Instructional Text
Required Prerequisites: None

Configuring Workday Expenses: Segmented Security (Subscription)
Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: 
Library: Financials Library and HCM Core Library
Description: This presentation will discuss configuring Workday Segmented Security. General familiarity with Workday navigation is recommended.
Covered Topics:
⦁ Segment Security
⦁ Create Security Group
⦁ Associate Security Groups with Domain
⦁ Activate Security Policy
⦁ Testing Security Policy
Required Prerequisites: None

Configuring Workday Expenses: Spend Categories & Expense Items (Subscription)
Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: 
Library: Financials Library and HCM Core Library
Description: In this training we'll review spend categories, expense items, and expenses setup. We'll cover the following topics:
⦁ Maintain Spend Categories and Expense Items
⦁ Expense Setup
⦁ Expense Items
⦁ Expense Item Groups
⦁ Reimbursement Rates
⦁ Item Attributes
Required Prerequisites: None
Learn On-Demand

Converting Contingent Workers (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
In this course, you will learn how to initiate the process of converting contingent workers to employees of your organization. You will also see how to verify the hire by using the View Organization as of feature.  
**Covered Topics:**  
- Initiating Conversion  
- Specify Department  
- Enter Job Details  
- Submission and Approval  
- Verify the hire  
**Required Prerequisites:** None

Core Compensation Components (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
In this course, we’ll provide definitions and examples of each of the basic compensation components, and will demonstrate how these components fit together.  
**Covered topics:**  
- Compensation Structure Overview  
- Eligibility Rules  
- Grades  
- Grade Profiles  
- Plans  
- Packages  
**Required Prerequisites:** None

Cost Center Organizations (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:**  
**Library:** Financials Library and HCM Core Library  
**Description:**  
After viewing this course, you will be able to define and create cost centers and cost center hierarchies.  
**Covered topics:**  
- Cost centers.  
- Cost center hierarchies.  
- Adding existing cost centers to cost center hierarchies.  
**Required Prerequisites:** None
Create an Accounting Journal Connector (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator and Implementer
Prerequisites: 
Library: Financials Library
Description:
This video will walk you through the configuration and administration of the Accounting Journal Connector.
Covered Topics:
⦁ Accounting Journal Connector Overview
⦁ Create Integration Worktag Mapping
⦁ Creating the Integration System
⦁ The Source File
⦁ Configuring the Business Process
⦁ Launching the Integration
⦁ Troubleshooting Errors and Considerations
Required Prerequisites: None

Create and Approve an Expense Report (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: 
Library: Financials Library
Description:
Expense reports are the primary means by which employee's request reimbursement for their expenses. This curriculum demonstrates how to create and approve an expense report from the perspective of employees and managers involved in the transaction.
Covered Topics:
⦁ Create an Expense Report
⦁ Approve an Expense Report
Required Prerequisites: None

Creating Custom Validations (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator and Implementer
Prerequisites: 
Library: Financials Library
Description:
Custom validations are condition rules that you define for your financial transactions to control data quality and minimize errors. In this course, we'll explore custom validations, what they are, and how to edit and create them.
Covered topics:
⦁ View and edit existing custom validations,
⦁ Create a new custom validation, and
⦁ Configure custom validation messages.
Required Prerequisites: None
Creating Pre-Hires (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
This video addresses creating Pre-Hires in the Workday system. For new and existing employees with responsibility for performing HCM transactions on Workday.

Covered Topics:
• Hiring in Workday
• Creating Pre-Hires
• Tips on Adding a Pre-Hire

Required Prerequisites: None

Curriculum Management (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Education/Government Library

Description:
Workday Student Curriculum Management helps you create, manage, and maintain the courses or learning units your institution offers, including the unique iterations of each course with course attributes and the necessary taxonomy for IPEDS reporting. This Learn On Demand (LOD) course explains how to create and maintain your courses and course sections.

Required Prerequisites: None

Custom Bank Statement Codes (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: Financials Library

Description:
This course teach you how to create custom bank statement codes in Workday. Custom codes are used when importing bank statements, to correctly identify transactions having non-standard codes.

Covered Topics:
• Creating a custom code set
• Assigning code sets to a bank account
• Viewing the results of bank statement processing
• Using custom codes in bank reconciliation rules

Required Prerequisites: None
# Custom Fields: Implementation Considerations (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:**
When storing and tracking data for your tenant, you have the ability to create custom fields and objects that are specific to your organization. This series explains the purpose of custom fields, as well as provides you with the key decision points in determining if custom fields are right for your business.  
**Covered Topics:**
- Extending the Workday Object Model  
- Uses for Custom Fields  
- Custom Fields in Context  
- Custom Fields Implementation Decision Tree  
**Required Prerequisites:** None

# Data as a Service Workday Benchmarking (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Implementer  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:**
Workday Benchmarking allows you to opt-in and contribute your data to a secure, aggregated data set that is then returned to you in the form of peer benchmarks. These benchmarks allow you to measure relative performance and take action to improve your competitive position. In this training, you will learn how to enable Benchmarking and configure access to appropriate users.  
**Required Prerequisites:** None

# Data Purging (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**
In this course, you’ll learn how to create a report to select a population for data purging and how to use the Purge Person Data task to select the data types, and perform the purge on selected data for the specific population.  
**Covered Topics:**
- What is Purge Person Data  
- Setting up Purge Person Data  
- Creating Custom Reports  
- Running Purge Person Data  
**Required Prerequisites:** None
Defining and Using Eligible Earnings (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
This training focuses on the compensation basis type of Eligible Earnings, which can be entered for individual employees to be used in calculating bonus amounts. Learn how to define and how to use Eligible Earnings in your Compensation configuration.

Covered topics:
- Create an Eligible Earnings Override Period
- Enter Eligible Earnings Override
- Bonus Calculation Using Eligible Earnings

Defining the Calculation Engine (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library

Description:
The calculation engine is a powerful in-system utility used to derive various Payroll and Absence related values such as hourly rates and accruals in Workday.

Deployment Roles and Responsibilities (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead and Executive
Prerequisites: None
Library: Financials Library and Free Library

Description:
A successful Workday deployment involves effort from every member of both the Workday project team and the customer project team. Watch this module to understand the various roles and responsibilities of individuals associated with supporting the overall implementation.

Covered Topics:
- Workday Project Team
- Customer Project Team

Required Prerequisites: None
Designing Reports For Optimal Performance (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: Cross Application/Technology Library and Free Library

Description:
If you’re having difficulties with report performance, there are several factors that may be causing this issue. This series provides you with job aids that will help you understand how to build reports that run efficiently and return within an acceptable time frame.

Covered Topics:
• Reporting Performance Overview
• Improving Report Performance

Required Prerequisites: None

DocuSign (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: Cross Application/Technology Library

Description:
Workday now supports DocuSign integration, so users can sign documents securely in the cloud.

Covered Topics:
• DocuSign Overview
• Configure Workday and DocuSign Connect
• Configure Anchor Text
• Add Review Document Step to Business Process
• Run Business Process and Add Signatures

Required Prerequisites: None

Dunning Letters (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: Financials Library

Description:
Improve the efficiency of your collections department with the new Workday Dunning Letter feature. Auto generate and email reminder letters to your customers on a one off or scheduled basis.

Covered Topics:
• Dunning Letter Overview
• Customer Impact & Tenant Configuration
• Printing Dunning Letters
• Scheduling & Viewing Dunning Letter Print Runs

Required Prerequisites: None
Learn On-Demand

**Effort Certification (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library, Financials Library, HCM Core Library, and Payroll/Absence/Time Tracking Library  
**Description:** Effort certification is often required by funding organizations to confirm they are correctly billed for and reimburse only those payroll expenses which fall within the scope of their funding agreements. Workday gives salaried employees a historical view of their payroll costing; they must either approve the costing or change the percentages of their time distribution so that it represents actual time worked. Effort certification for hourly employees occurs during the time entry process and prior to the running of payroll. Upon completion of this training, you will be able to configure and manage effort certification for salaried employees and certify effort for hourly employees.  
**Covered Topics:**  
- Effort Certification Overview  
- Configuring Effort Certification  
- Certify Effort  
**Required Prerequisites:** None

**EIB Integrations Using Spreadsheet Import Templates (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:** Load data into Workday in bulk using spreadsheet import templates. These templates can be generated based on a Workday Web Service operation and used to load data directly into Workday business processes. The template model can also be edited to simplify the data entry process. This training provides an introduction to spreadsheet templates by describing the structure of the template model and listing guidelines for using the spreadsheets.  
**Required Prerequisites:** None

**Eligibility Rules (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library  
**Description:** This course will teach you how to use eligibility rules in Workday Student by leveraging information to filter prospects, applicants, or students to aid administrative processing.  
**Covered Topics:**  
- Eligibility Rules Concepts  
- Create an Eligibility Rule  
- Exclusion Eligibility Rules  
- Combination Eligibility Rules  
**Required Prerequisites:** None
**Employee Review Template Introduction (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
In this course, you'll learn how Employee Reviews are used in Workday. You'll also be able to identify review types and understand review templates available in Workday.  
**Required Prerequisites:** None

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**Endowment Accounting Series (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library  
**Description:**  
This course will assist you in setting up your institutions endowment accounting in Workday.  
**Covered Topics:**  
⦁ Introduction to Endowment Accounting  
⦁ Setting Up Investment Pools  
⦁ Manage Gifts and Donors  
⦁ Manage Pool Transactions  
⦁ Manage Pool Valuation and Payout  
⦁ Endowment Accounting Reports  
**Required Prerequisites:** None

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**Escheatment Accounting (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Escheatment is the process of identifying and remitting unclaimed property to a state authority. Workday provides an easy and cost effective way to manage unclaimed payments, escheat them, and create the associated escheatment accounting.  
**Covered Topics:**  
⦁ Finding payments to escheat  
⦁ Escheating payments  
⦁ Cancelling and updating escheated payments  
⦁ Escheatment accounting  
⦁ Configuring escheatment functionality  
**Required Prerequisites:** None
### Evidence of Insurability: Manage the Process (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**
The purpose of this job aid is to review how to use the, manage evidence of insurability status task, to track the status of insurance enrollments over the guaranteed issue amount. It is important that you are familiar with the set up, and configuration of the insurance plans, and levels of change in the Enrollment Event Rules.  
**Covered topics:**  
- Overview of Manage Evidence of Insurability Status task  
- Running the Task  
- Updating Status  
**Required Prerequisites:** None

### Evidence of Insurability: Setup (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**
This job aid is designed to assist Benefits professionals with the setup of evidence of insurability rules and processing options. The job aid provides information about where to set up evidence of insurability rules, which include the Enrollment Event Rules, Maintain Benefit Defaults, and the Benefit Group.  
**Covered topics:**  
- Overview - Evidence of Insurability  
- Enrollment Event Rules  
- Levels of Change  
- Setup  
**Required Prerequisites:** None

### Expense Analytics and Reporting (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**
This presentation will discuss expense related reports and reporting tools.  
**Covered Topics:**  
- Spend Analytic Reports  
- Expense Audit Reports and Tools  
- Spend Alerts, Notifications and Customizable Standard Reports  
**Required Prerequisites:** None
# Extended Indexed Data Sources (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, Implementer, and Internal  
**Prerequisites:**  
**Library:**  
**Description:** Extended indexed data sources are used to extend indexed data sources and fields you can use in your reports to make them run more efficiently and effectively.  
**Covered Topics:**  
- Indexed vs. Non-Indexed Data Source Performance  
- Benefits and Design Considerations of Extending Indexed Data Sources  
- Data Source and Field Eligibility for Indexing  
- Prerequisites and Process for Extending Indexed Data Sources  

**Required Prerequisites:** None

# Financial Management Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library and Free Library  
**Description:** Learn about all of the ways that Workday Financial Management can help your organization manage and report on its financial data.  
**Covered Topics:**  
- Worktags  
- Reporting  
- Month-end Closent  

**Required Prerequisites:** None

# Financials Terminology for Education and Government (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library and Financials Library  
**Description:** Become familiarized with the Workday's financials terminology for Education and Government.  

**Required Prerequisites:** None
Learn On-Demand

**Form I-9 & E-Verify Integration Overview (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This course presents a basic overview of the Form I-9 process within Workday. It also covers Workday's I-9 business process and integration with E-Verify, while finally explaining the benefits of Workday Form I-9.  
**Covered Topics:**  
- Form I-9 Overview  
- E-Verify Integration Overview  
**Required Prerequisites:** None

**Getting Started with Workday Studio (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
Workday Studio allows users to build integrations and report designs that can be deployed and launched into their Workday tenant. This series will provide an overview of Workday Studio, as well as how to install both Studio and the Report Designer.  
**Covered Topics:**  
- Introducing Workday Studio  
- Workday Studio Install  
- Workday Studio Navigation Tips  
- Studio Runtime Architecture  
- Building Integrations: Using the Assembly Editor  
- Report Designer: Introduction  
- Report Designer: Demonstration  
**Required Prerequisites:** None

**Getting the Most out of Workday Search (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator, Executive, and Implementer  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:**  
Workday Search is so important to the Workday experience, we want to provide some best practices and tips and tricks to getting the best results from search.  
**Covered Topics:**  
- Global Search  
- Prompt Search  
- Search Reports  
- Advanced Search Techniques  
**Required Prerequisites:** None
Learn On-Demand

Global Library (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator and Implementer
Prerequisites: None
Library: HCM Core Library and Payroll/Absence/Time Tracking Library

Description:
In this course, we’ll discuss the global library, its purpose, and its configuration steps.

Covered Topics:
⦁ Global Library Overview
⦁ Navigating the Global Library
⦁ Configuring the Global Library

Required Prerequisites: None

Goal Setup and Management (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
Watch this training to learn to manage team and individual goals within Workday and to understand the basics of goal setup and management, including the differences between organization and personal goals. By the end of this presentation, you will learn how to copy goals, link personal goals to organization goals, and how to cascade goals.

Covered Topics:
⦁ Goal Setup
⦁ Goal Management

Required Prerequisites: None

Grants Management Award (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: Education/Government Library and Financials Library

Description:
Workday Grants Management Award is part of the Grants Management Overview series, designed to aid you in your preparation for deployment of Workday Grants Management. This training is an introduction to the award as a core concept in Workday Grants Management. This curriculum consists of two presentations and one job aid.

Covered Topics:
⦁ Award Overview
⦁ Award Lines
⦁ Award Amendments and Corrections

Required Prerequisites: None
Learn On-Demand

Grants Management Revenue & Billing (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Workday Administrator

**Prerequisites:**

**Library:** Education/Government Library and Financials Library

**Description:**

This module is the third and final in a series of three sessions designed to aid in your preparation for deployment of Workday Grants Management. Upon completion of this training, you will be able to identify when Workday recognizes revenue for both cost reimbursable and fixed amount types. You will also be familiar with the option Workday offers to schedule billing to run automatically, as well as independently of revenue recognition.

**Covered Topics:**

- Revenue Recognition Overview
- Cost Reimbursable
- Fixed Amount
- Billing
- Letters of Credit
- Draw Down

**Required Prerequisites:** None

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HCM and Mobile Series (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive

**Prerequisites:**

**Library:** HCM Core Library

**Description:**

This series will discuss the features with HCM for mobile devices.

**Covered Topics:**

- HCM and Mobile: Getting Started
- HCM and Mobile: Demonstration

**Required Prerequisites:** None

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HCM Report Data Sources and Reporting Tips (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Integration Lead, Functional Lead, and Workday Administrator

**Prerequisites:**

**Library:** Cross Application/Technology Library

**Description:**

In this series, you'll learn about reporting in the HCM areas of Staffing events and Benefits enrollment events and elections. These job aids provide information regarding building reports using the right data sources and business objects, providing you with better looking and performing reports.

**Covered Topics:**

- Staffing Events Reporting
- Benefits Enrollment Events and Elections Reporting

**Required Prerequisites:** None
Health Savings and Flexible Spending Accounts Setup (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
This Job Aid will discuss Health Savings Account and Flexible Spending Account setup as well as Cross Plan Dependencies and Pay Group considerations.

Covered Topics:
- HSA and FSA Overview
- HSA Plan Setup
- FSA Plan Setup

Required Prerequisites: None

Import Payroll Off-Cycle Payment EIB (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Cross Application/Technology Library

Description:
In this course about the Payroll Off-Cycle Payment EIB, you'll learn how to create and populate an EIB spreadsheet template. You'll also learn about the required security permissions to complete this process and how to locate required Workday IDs and Reference IDs to populate the spreadsheet.

Covered Topics:
- Import Payroll Off-Cycle Payment EIB Overview
- Resources for Creating EIBs
- Use Case Setup
- Security Requirements
- Import Payroll Off-Cycle Payment Setup
- Using the EIB Spreadsheet
- Completing the Integration

Required Prerequisites: None
**Inbound EIB: Assign Organizations (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and HCM Core Library  

**Description:**  
Each EIB web-service operation behaves differently; each EIB spreadsheet template has quirks that need to be understood to successfully load information. After viewing this course, you should know how and when to use the Assign Organization EIB, how to set up a template model for your use case, and how to troubleshoot common organization assignments issues.  

** Covered Topics:**  
⦁ Using the Assign Organization EIB  
⦁ Configuring the Assign Organization EIB Template Model  
⦁ Adding or Removing Organizations from Workers or Positions  
⦁ Troubleshooting Common Issues  

**Required Prerequisites:** None  
**Recommended Prerequisites:** EIB Integrations Using Spreadsheet Import Templates

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**Inbound EIB: Change Job (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User and Workday Administrator  
**Prerequisites:**  
**Library:**  

**Description:**  
Each EIB web-service operation behaves differently; each EIB spreadsheet template has quirks that need to be understood to successfully load information. After viewing this course, you should understand the relationship between the Change Job spreadsheet import template and the Change Job business process in Workday.  

** Covered Topics:**  
⦁ Using the Change Job EIB  
⦁ Determining Your Change Job EIB Business Process  
⦁ Setting Up a Step Condition  
⦁ Recommended Process for Populating the EIB Template  
⦁ Populating the Spreadsheet  

**Required Prerequisites:** None  
**Recommended Prerequisites:** EIB Integrations Using Spreadsheet Import Templates

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**Inbound EIB: High Volume Hires (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  

**Description:**  
Generate a spreadsheet template for importing Hire data into Workday using an EIB integration. The spreadsheet allows you hire many employees at one time by providing the data required to complete your Hire business process. Please first view the "EIB Integrations Using Spreadsheet Import Templates" training for an overview of spreadsheet import templates.  

** Covered Topics:**  
⦁ Inbound EIB: High Volume Hires  
⦁ Hire Employee Sample Spreadsheet  

**Required Prerequisites:** None
### Individual Rates (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:** This course will discuss how individual rates are used with benefit plans in Workday. You’ll learn how to configure benefit plans to use individual rates, update individual rates after enrollment, and load individual rates using an Enterprise Interface Builder, or EIB.  
**Required Prerequisites:** None

### Integration Options: Picking the Right Tool (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:** Are you unsure which of Workday’s integration tools best suit your business needs? This training will help you pick the right tool for the right task. You’ll learn about the various strengths of Integration Cloud Connect and our Custom Integration tools, as well as common use cases for each option.  
**Covered Topics:**  
- Considerations  
- Integration Cloud Connect  
- Document Transformation  
- Enterprise Interface Builder  
- Workday Studio  
**Required Prerequisites:** None

### Integration Security Overview (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:** Learn the basics of integration systems security, including how the security of integrations is configured on an Integration System User (ISU). This training also reviews general Workday security fundamentals in order to explain how ISUs fit into security groups and thus security policies. Finally, we address EIB integrations, and how their security differs from that of other integrations.  
**Covered Topics:**  
- Integration System Security  
- Edit Security for EIB Integrations  
**Required Prerequisites:** None
Intersection Security Groups (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: Cross Application/Technology Library
Description:
This course focuses on Intersection Security Groups.
Covered Topics:
⦁ Intersection Security Group Overview
⦁ Intersection Security Group Without Exclusion
⦁ Modify Security Policies for Intersection Security
⦁ Intersection Security Group With Exclusion
⦁ Activate and Test Security Policy Changes
Required Prerequisites: None

Interview Scheduling Using Outlook 365 (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User, Functional Lead, Workday Administrator, and Implementer
Prerequisites:
Library: HCM Core Library
Description:
Including interviews in your recruiting process is a key component to determining the best candidate for a job. This training demonstrates the configuration and functionality of interview scheduling using Outlook 365.
Covered Topics:
⦁ Configuring the Outlook 365 Integration
⦁ Scheduling an Interview
⦁ Managing Interviewer Responses
⦁ Rescheduling an Interview
Required Prerequisites: None

Intraday Bank Statements (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: Financials Library
Description:
Interested in improving your cash management? View this course to explore the enhancements to Intraday bank statement functionality that drive greater flexibility in bank statement processing.
Covered Topics:
⦁ Differences in Intraday and Prior Day statements in Workday
⦁ Available options for importing bank statements
⦁ Configuring and processing Intraday bank statements
Required Prerequisites: None
### Introducing Report Designer (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:**  
Make your Studio installation seamless by viewing this demonstration. You will be provided with step-by-step instructions for installing Workday Studio, as well as a demonstration of launching the application.  
**Covered Topics:**  
- Install Java Development Kit  
- Download Java Cryptography Extension Files  
- Download Workday Studio  
- Launch Workday Studio  
**Required Prerequisites:** None

### Introducing Workday Studio (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:**  
This presentation introduces Workday Studio by defining its purpose, functionality, target users, and available resources found on Workday Community.  
**Required Prerequisites:** None

### Introduction to Data Discovery (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, Workday Administrator, Executive, Implementer, Internal, and Managers and Employees  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
Data discovery is a tool that enables analysts to create visual analytics from Workday Prism Analytics data sources and display them using discovery boards. The environment is intended for ad hoc analysis and exploration of Prism Analytics data sources.  
**Covered Topics:**  
- Discovery Boards  
- Creating and Exporting a Visualization  
- Security and Sharing  
**Required Prerequisites:** None
Introduction to Delivery Assurance 2018 (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:**  
The purpose of this training is to introduce how Delivery Assurance fits into the Workday Methodology and is executed throughout the life cycle of a project. Upon completion of this module you will be able to define Delivery Assurance, explain the types of checkpoints, and identify the role of the Delivery Assurance Manager. 
**Covered Topics:**  
- Delivery Assurance Overview  
- Why do Delivery Assurance?  
- Delivery Assurance Checkpoints  
- The Delivery Assurance Manager  
**Required Prerequisites:** None

Introduction to Document Transformation (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
View this training to see how Document Transformation compares to other Workday integration tools, as well as steps to create a Document Transformation integration using custom report data. 
**Covered Topics:**  
- Document Transformation Concepts  
- Document Transformation Using a Custom Report  
**Required Prerequisites:** None

Introduction to Grants Management (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Education/Government Library and Financials Library  
**Description:**  
This presentation is the first in a series of three sessions designed to aid you in your preparation for deployment of Workday Grants Management. Upon completion of this training, you will be able to describe the benefits of Workday Grants Management. 
**Covered Topics:**  
- Features Overview  
- The Workday Difference  
- Grants Lifecycle  
- The Workday Strategy  
- Unified Approach  
**Required Prerequisites:** None
Learn On-Demand

Introduction to Integration Systems (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: Cross Application/Technology Library

Description:
This training provides an overview of integration systems, including an outline of the most common features. We discuss the role of integration systems within the Workday Integration Architecture and then demonstrate how to launch an integration and view the resulting event, including relevant statuses and messages.

Covered Topics:
⦁ Integrations Systems Concepts
⦁ Launch an Integration System
⦁ Schedule a Recurring Integration

Required Prerequisites: None

Introduction to Student Recruiting (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, Workday Administrator, and Executive
Prerequisites:
Library: Education/Government Library

Description:
In this course, you will be introduced to Student Recruiting and take a look at how it works within Workday Student. After you complete these trainings, you will understand the basics of Student Recruiting.

Covered Topics:
Introduction to Student Recruiting
⦁ Student Recruiting Concepts
⦁ Student Recruiting Business Processes
⦁ Student Recruiting Glossary
⦁ Student Recruiting Crossword

Regions and Recruiters
⦁ Student Recruiting: Regions and Recruiters

Campaigns and Events
⦁ Create Campaigns and Additional Setup for Recruiting Events
⦁ Student Recruiting Event Tasks

Student Prospects
⦁ Required Prerequisites: None
## Just In Time Replenishment for Healthcare (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Workday Administrator, and Managers and Employees  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**
You can now replenish PAR locations using a just-in-time (JIT) replenishment process that automatically creates requisitions and purchase orders using specific JIT units of measure and pricing. In this course we'll discuss configuration requirements and demonstrate how to fulfill inventory using JIT replenishment.  
**Covered Topics:**  
- Overview of Just In Time Replenishment  
- Configuring Workday for JIT Replenishment  
- Just In Time PAR Replenishment  
- Goods Delivery for JIT PAR Replenishment

**Required Prerequisites:** None

## Loading Period Schedules Through EIB (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**
Workday products like Payroll and Absence use period schedules, which can require that hundreds of lines of information be populated into Workday before going live. Using the Enterprise Interface Builder (EIB) can streamline this data processing. In this training session we will demonstrate how to upload Period Schedules using an EIB.  
**Covered topics:**  
- Period Schedule Spreadsheet  
- Create an EIB and Generate a Spreadsheet Template  
- Launch the Period Schedule EIB upload and validate

**Required Prerequisites:** None

## Location and Organization Membership Security Groups (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**
This training focuses on location and organization membership security groups, and provides steps on how to create a location membership security group.  
**Covered Topics:**  
- Location Membership Security Groups Examples  
- Organization Membership Groups Examples  
- Creating a Location Membership Security Group

**Required Prerequisites:** None
Location Organizations (Subscription)

Delivery Mode: Learn On-Demand

Audience: Functional Lead and Implementer

Prerequisites: None

Library: Financials Library and HCM Core Library

Description:
After viewing this course, you will be able to define and create location organizations and add a location to a location hierarchy. You will also be able to list the different ways you can use locations in Workday and identify considerations when creating location structures for different product areas.

Covered topics:
- Location usages.
- Creating locations.
- Location hierarchies.
- Considerations when creating location structures.

Recommended Prerequisites: None

Maintaining Dashboards (Subscription)

Delivery Mode: Learn On-Demand

Audience: Business User, Functional Lead, Workday Administrator, Implementer, Internal, and Managers and Employees

Prerequisites: None

Library: HCM Core Library

Description:
By the end of this course, you should be able to identify the key elements of a dashboard and locate and filter dashboard results. Additionally, you should be able to configure required and optional content, configure menu options, alter display options based on security settings, and create an announcement.

Covered Topics:
- Key Elements of a Dashboard
- Locating and Filtering Dashboard Results
- Configuring Required and Recommended Content
- Configuring the Menu
- Managing Access via Security
- Creating an Announcement

Recommended Prerequisites: None

Manager Self-Service Overview (Free)

Delivery Mode: Learn On-Demand

Audience: Workday Administrator and Executive

Prerequisites: None

Library: Free Library and HCM Core Library

Description:
This course will explore the specific capabilities of the Manager role in Workday HCM. If you're interested in training related to manager self-service, Workday offers a manager self-service kit, the Adoption Kit. For more information, visit our Community page: https://community.workday.com/ak

Covered topics:
- Home Page Overview
- Maintain Dashboards for a Tenant

Required Prerequisites: None
Managing Applications (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Education/Government Library
Description:
Workday allows you to enter applications through a variety of methods then record supplemental information to complete application requirements. Once all pre-decision application requirements are complete, you can render and finalize acceptance decisions for applications.

In this course, we will cover a basic application process. We will show what this process looks like in Workday by demonstrating how to enter an application, record a submitted application fee, residency information, test scores, and transcripts. We will render a decision for the application, and finalize the decision.

Required Prerequisites: None

Managing Business Process Events (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: HCM Core Library
Description:
In this course, you will learn how to manage business process transactions after they occur. You will learn how to delegate and reassign business process tasks, and how to correct, rescind, and cancel business process events.

Covered Topics:
- Overview of event management
- Assess business process security for event management actions
- Find a business process transaction
- Request a delegation
- Reassign a business process task
- Rescind, cancel, and correct business process events

Required Prerequisites: None

Managing International Jobs (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: HCM Core Library
Description:
This course discusses how to manage various tasks for International Jobs with regards to HCM.

Covered Topics:
- Maintain International Assignment Types task
- Viewing International Job data
- Propose compensation for an International Assignment
- Terminate an employee on International Assignment

Required Prerequisites: None
Managing the Planning Event Business Process (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library and HCM Core Library  
**Description:**
In this video, you will gain an understanding of the steps and options available during the planning event business process to help you best manage the decentralized planning process within your organization.  
**Covered Topics:**
⦁ Navigating the Planning Event Business Process  
⦁ Generating Plan Workbooks  
⦁ Using the Planning Process Control Inbox Item  
⦁ Organization Planner View  
**Required Prerequisites:** None

Mass Operation Management (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**
In this course, you will learn about the Mass Operation Management (MOM) task. MOM enables a configured security group to perform operations more efficiently. With MOM, you can configure Workday to perform groups of operations automatically instead of manually having to run the same operation multiple times. This course will discuss how to set up a MOM event, run a MOM task, monitor and review the event, and troubleshoot common errors.  
**Covered Topics:**
⦁ Overview of the mass operation management  
⦁ Run the mass operation task for escalate  
⦁ Complete MOM review and view results  
**Required Prerequisites:** None

Matrix Organizations (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:**  
**Library:** Financials Library and HCM Core Library  
**Description:**
After viewing this course, you will be able to define and create matrix organizations and assign workers to them.  
**Covered topics:**
⦁ Creating matrix organizations.  
⦁ Assigning workers to matrix organizations.  
**Required Prerequisites:** None
Learn On-Demand

**Merit: Coordination of Events (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, Workday Administrator, Implementer, Internal, and Managers and Employees  
**Prerequisites:** N/A  
**Library:** HCM Core Library and Payroll/Absence/Time Tracking Library  
**Description:**
In this course, you will learn how different dates impact the merit award process. You will also learn about different coordination-of-event scenarios, including coordination of events without participation rules and those with participation rules and varying dates.  
Covered Topics:
- Explanation of how key dates impact the merit award process.
- Demonstration of different coordination-of-event scenarios with and without participation rules.

**Required Prerequisites:** None

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**Mobile Credit Card Expenses (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** N/A  
**Library:** Financials Library and HCM Core Library  
**Description:**
Learn how to use a new feature that allows you to manually enter credit card transactions into expense reports via the Workday mobile application.  
Covered topics:
- List the issues that required this addition  
- Enter credit card transactions into the mobile app

**Required Prerequisites:** None

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**Mobile Inventory for Healthcare (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** N/A  
**Library:** Financials Library  
**Description:**
Inventory workers are not stationary. Many transactions and decisions need to be made physically within an inventory site. This course will explore the features and benefits of Workday Inventory, and show how you can perform inventory actions using the Workday mobile app.  
Covered Topics:
- Inventory Overview  
- Counting Stock Inventory  
- Counting Par Inventory  
- Inventory Picking  
- Key inventory terminology

**Required Prerequisites:** None
Multi-factor Authentication (Free)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator  
Prerequisites:  
Library: Cross Application/Technology Library and Free Library  
Description: This course focuses on what multi-factor authentication is, how to deploy it for Workday purposes, and how to configure the authenticator app.  
Covered Topics:  
⦁ Authentication Overview  
⦁ Workday Authentication  
⦁ Additional Authentication Options  
⦁ Configure Authenticator App  
Required Prerequisites: None

Multilingual Deployment and Maintaining Translations in Workday (Free)

Delivery Mode: Learn On-Demand  
Audience: Workday Administrator, Executive, and Managers and Employees  
Prerequisites:  
Library: Cross Application/Technology Library and Free Library  
Description: Designed to explain to customers Workday multilingual deployments, how to configure global tenant setup, and help to determine how to translate and maintain tenanted data translations.  
Covered Topics:  
⦁ Planning for a Multilingual Deployment  
⦁ Tenant Setup  
⦁ Translate Tenanted Data  
⦁ UAT and Tenanted Translation Maintenance  
Required Prerequisites: None

Multiple Managers for Single Supervisory Organization (Subscription)

Delivery Mode: Learn On-Demand  
Audience: Integration Lead, Functional Lead, and Workday Administrator  
Prerequisites:  
Library: HCM Core Library  
Description: What happens when your supervisory organization has more than one manager? This course covers the Multiple Managers feature as well as the configuration you'll need to know for this feature. We'll also take a look at what the system will look like once the Multiple Managers feature has been configured.  
Covered topics:  
⦁ Multiple Managers Overview  
⦁ Configuration of Multiple Managers  
⦁ Viewing Multiple Managers  
Required Prerequisites: None
Learn On-Demand

Navigation (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:** This course focuses on Workday HCM navigation as it applies to search features, landing pages, worklets, links and related actions in the Workday system.

**Covered Topics:**
- Search Features  
- Landing Pages and the Inbox  
- Configuring Worklets  
- Links and Related Actions  
**Required Prerequisites:** None

nBox Reports (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:** The nBox report type enables you to build a report where your report groupings and counts are captured across configured vertical and horizontal axes in 'boxes'. Workday's delivered talent matrix reports are based on an nBox report type. The nBox reports you create are fully configurable. All nBox reports require the use of an indexed data source. nBox reports allow you to group, summarize and drill similar to a matrix report, with the added feature of displaying your results across defined horizontal and vertical "boxes" or mappings. Data can be captured, for example, in a 3x3 boxed matrix as shown below. You can display up to 2000 pictures and configure up to a 5x5 boxed matrix. Since nbox reports require indexed data sources, you can configure facet filters for greater usability.

**Covered topics:**
- nBox Reports  
- Copying a Starting Custom Report  
**Required Prerequisites:** None

Negative Reimbursable Expense Reports (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Workday Administrator, Executive, and Managers and Employees  
**Prerequisites:**  
**Library:** Financials Library  
**Description:** You can submit expense reports with negative reimbursable amounts for personal transactions on corporate credit cards and automatically generate the accounting, eliminating the need for manual tracking.

**Covered Topics:**
- Negative Reimbursable Expense Report Overview  
- Tenant Configuration  
- Creating an Expense Receivable Payment  
**Required Prerequisites:** None
**Object Transporter (Subscription)**
**Delivery Mode:** Learn On-Demand
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Implementer
**Prerequisites:**
**Library:** Cross Application/Technology Library
**Description:**
Designed to introduce and describe the functionalities and benefits of Object Transporter. Covered topics:
- Definition of Object Transporter
- Security Configuration
- Migrate a New Object
- View the Diff Analysis
- Create and Migrate a Configuration Package
**Required Prerequisites:** None

**Organizations (Free)**
**Delivery Mode:** Learn On-Demand
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive
**Prerequisites:**
**Library:** Free Library and HCM Core Library
**Description:**
In these trainings, you will learn about the different types of organizations offered in the Workday system, with a focus on the supervisory organization. Covered Topics:
- Organizations in Workday
**Required Prerequisites:** None

**Pay Cycle Command Center Dashboard Configuration (Subscription)**
**Delivery Mode:** Learn On-Demand
**Audience:** Workday Administrator and Implementer
**Prerequisites:**
**Library:** Payroll/Absence/Time Tracking Library
**Description:**
In this course, we’ll explore the Pay Cycle Command Center. This is a dashboard that enables you to access the information you need for each phase of a pay cycle, from preparation and processing, to post-complete processing. Covered Topics:
- Pay Cycle Command Center Overview
- Security Domain Configuration
- Pay Cycle Command Center Dashboard Configuration
- Pay Cycle Command Center Worklet
**Required Prerequisites:** None
<table>
<thead>
<tr>
<th>Payroll - Adding Payroll Input (Subscription)</th>
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<td><strong>Delivery Mode:</strong> Learn On-Demand</td>
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<td><strong>Audience:</strong> Workday Administrator</td>
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<td><strong>Prerequisites:</strong></td>
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<tr>
<td><strong>Library:</strong> Payroll/Absence/Time Tracking Library</td>
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<tr>
<td><strong>Description:</strong> This course demonstrates how to add payroll input for a worker.</td>
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<tr>
<td><strong>Covered Topics:</strong></td>
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<tr>
<td>• Add Payroll Input by Worker</td>
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<td>• Payroll Calculation</td>
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<td><strong>Required Prerequisites:</strong> None</td>
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<tr>
<th>Payroll - Create a Deduction (Subscription)</th>
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<tr>
<td><strong>Audience:</strong> Integration Lead and Workday Administrator</td>
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<td><strong>Prerequisites:</strong></td>
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<tr>
<td><strong>Library:</strong> Payroll/Absence/Time Tracking Library</td>
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<tr>
<td><strong>Description:</strong> Need to create a new deduction for payroll processing? This training, designed as a refresher for those who have completed the Workday Payroll Fundamentals course, will guide you through each tab of the Create Deduction task.</td>
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<tr>
<td><strong>Covered Topics:</strong></td>
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<tr>
<td>• Create a Deduction Overview</td>
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<tr>
<td>• Configuring Deductions</td>
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<td><strong>Required Prerequisites:</strong> None</td>
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<thead>
<tr>
<th>Payroll - Create an Earning (Subscription)</th>
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<tr>
<td><strong>Library:</strong> Payroll/Absence/Time Tracking Library</td>
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<tr>
<td><strong>Description:</strong> This course will discuss the concepts around using the Create Earning task. It will also prepare you to add earnings yourself, once your organization is live on Workday.</td>
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<tr>
<td><strong>Covered Topics:</strong></td>
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<tr>
<td>• Create an Earning Overview</td>
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<tr>
<td>• Earnings Tabs</td>
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<tr>
<td><strong>Required Prerequisites:</strong> None</td>
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</tbody>
</table>
### Payroll - Gross Up Calculations (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**
In this training, you will learn about gross up calculations, how they are used and how they can affect payments. You will also learn how to set-up and implement gross up calculations as well as learn about their tax limitations.  
**Covered Topics:**
- Gross Up Calculations  
- Create a Gross Up Earning  
- Process a Gross Up Calculation  
**Required Prerequisites:** None

### Payroll - Introduction to U.S. Year End Payroll (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**
The first step to running your year-end payroll is configuration. In this on demand education module, you will learn how to view and configure the W-2 boxes, and setup the sort and split options for the print data. You'll also look at the tax documents from an employee's perspective, and learn how to modify the self-service settings as an administrator.  
**Covered Topics:**
- W-2 Setup  
- Employee Self-Service Configuration  
**Required Prerequisites:** None

### Payroll - Off Cycle Processes: Reversals (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**
In this course, you will learn how to reverse a payroll result in Workday payroll.  
**Covered Topics:**
- Process Reversal  
**Required Prerequisites:** None
Learn On-Demand

Payroll - On Demand Payments (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
This course is intended to bring Workday Payroll users quickly up to speed on On Demand Payments.
Covered Topics:
⦁ Create On Demand Payments
⦁ On Demand Payments Calculations
Required Prerequisites: None

Payroll - Pay Calculation Results Audit Report (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
In this course, you will learn how to run and configure the Pay Calculation Results for a Period Audit report. Audit reports are configurable so you can create your own audit reports within the parameters of the report template.
Covered Topics:
⦁ Run an Audit Report
⦁ Modify Audit Parameters
⦁ Test Report Changes
Required Prerequisites: None

Payroll - Pay Groups (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User, Functional Lead, Workday Administrator, Executive, Implementer, and Internal
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
In this course, we'll explore pay groups, including their purpose, security options, visibility options, and associated details. We'll discuss how they can be grouped into pay run groups to associate sets of pay groups with run categories that can be processed and reported on together. Finally, we'll cover how to assign workers to the appropriate pay groups.
Covered Topics:
⦁ Pay Groups Overview
⦁ View a Pay Group
⦁ Create a Pay Group
⦁ Assign a Pay Group Manually
⦁ Assign a Pay Group Using Automatic Assignment Rules
⦁ Assign a Pay Group as Part of a Staffing Process
Required Prerequisites: None
Payroll - Reprint Advices (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
If you need to reprint an advice that has already been generated, this brief job aid details how to locate and reprint advices.

Covered Topics:
• Locate Advices
• Reprint Advices

Required Prerequisites: None

Payroll - Retroactive Processing (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User and Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
In this course, we'll review how Workday processes retroactive payroll events. We'll show you a supported retroactive event and how to process the payment as part of the On-Cycle payroll or a separate On-Demand Payment. We'll also demonstrate an unsupported retroactive event, and how this affects a worker's retroactive processing date limitations. Lastly, we'll look at how Workday handles the processing of both a supported and unsupported retroactive event at the same time.

Covered Topics:
• Retro Payroll Overview
• Set the No Retro Processing Prior To Date
• Process a Supported Retro Event
• Process an Unsupported Retro Event
• Process Supported and Unsupported Retro Events

Required Prerequisites: None

Payroll - Run Categories (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator, Implementer, Internal, and Managers and Employees
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
In this course, we'll cover the basics of what a run category is and how it functions within a pay run. We'll view a run category and discuss the components within it. We'll create a new run category. Finally, we'll explore some tips and key considerations for run categories.

Covered Topics:
• Run Categories Overview
• View a Run Category
• Create a Run Category for Active and Terminated Workers
• Key Tips and Considerations for Run Categories

Required Prerequisites: None
### Payroll - Running Pay Calculation, Complete, and Settlement (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
This curriculum demonstrates how to run a payroll pay calculation, complete a payroll, and create a settlement run for payroll.  
**Covered Topics:**  
- Run and Complete Pay Calculation  
- Create a Settlement Run  
**Required Prerequisites:** None

### Payroll - Running Pre-note Authorizations (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
This job aid covers how to set up and process prenote authorizations.  
**Covered Topics:**  
- Create a Prenote Run  
- Update Prenote Information for an Individual and for Multiple Payees  
- Maintain Payment Elections  
- Examine Payment Election Business Process  
**Required Prerequisites:** None

### Payroll - Trailing Payments (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library and Payroll/Absence/Time Tracking Library  
**Description:**  
This course covers the trailing payments feature.  
**Covered Topics:**  
- Overview of trailing payments feature  
- Processing a trailing payment  
**Required Prerequisites:** None
Payroll - Viewing Payroll Results and Payslips (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
This course brings Workday Payroll users quickly up to speed on Viewing Payroll Results and Payslips.
Covered Topics:
• View a Payslip
• View Payroll Results
Required Prerequisites: None

Payroll Interface: Change Detection (Free)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Free Library and Payroll/Absence/Time Tracking Library
Description:
This training will explain the impact of launch parameters, including change detection, on the data included in a payroll extract.
Covered topics:
• Change Detection Overview
• Change Detection Pattern and Staffing Events
• View a Primary Integration System
• Launch or Schedule an Integration Run
• Change Detection FAQs
Required Prerequisites: None

Payroll Interface: Using the Audit Files (Free)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Free Library and Payroll/Absence/Time Tracking Library
Description:
The purpose of this training is to demonstrate how to use the Payroll Interface Audit files. You will learn how to use the audit files to find out which workers were on the payroll file, which ones were not included, and why.
Covered topics:
• Enable Auditing
• View Audit files
• Types of Audit Files
Required Prerequisites: None
### Payroll Report Data Sources and Reporting Tips

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Integration Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
Gain an understanding of Payroll reporting with this job aid. Along with providing a Payroll Result relationship diagram, this training offers common standard and audit reports that can be used, as well as helpful descriptions for each.

**Required Prerequisites:** None

### Payroll, Absence, and Time Tracking Report Data Sources and Reporting Tips (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
Gain an understanding of Payroll, Absence, and Time Tracking reporting with these job aids. Along with providing relationship diagrams, this training offers common standard and audit reports that can be used, as well as helpful descriptions for each.

**Covered Topics:**
- Payroll Report Data Sources and Reporting Tips
- Absence Report Data Sources and Reporting Tips
- Time Tracking Report Data Sources and Reporting Tips

**Required Prerequisites:** None

### Performance: Development Plans (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This training reviews the purpose, configuration, and execution of development plans.

**Covered topics:**
- Define a development plan and differentiate from a performance review
- Configure a development plan template
- Launch and complete a development plan process

**Required Prerequisites:** None
Performing a Job Change (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
The Change Job process asks questions that will help guide managers through the details of a job change. This training delivers the reasons and change types associated with the Change Job functionality, and ultimately, how to perform a job change for a worker.  
**Covered Topics:**  
- Performing a Job Change  
- Change Job Configuration Options  
- Move Manager's Team  
**Required Prerequisites:** None

Period Activity Pay Series (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Education/Government Library and HCM Core Library  
**Description:**  
In this series, we will cover the payment of fixed term faculty with Workday's Period Activity Pay feature. You will learn the core configurations needed to get started with Period Activity Pay and the associated business processes to manage Period Activity Pay post go-live. This curriculum consists of one presentation and six demonstrations.  
**Covered Topics:**  
- Period Activity Pay Overview  
- Period Activity Pay Enablement  
- Period Activities and Period Activity Tasks  
- The Period Activity Rate Matrix  
- Manage Period Activity Pay Assignments  
- Assign Eligible Period Activities on Employee  
- Period Activity Reports  
**Required Prerequisites:** None

Period Schedules for Payroll, Absence, and Time Tracking (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library and Payroll/Absence/Time Tracking Library  
**Description:**  
In this training, we'll define and explore the major components of period schedules. We'll also demonstrate how to add periods to a schedule and the security policy configurations related to a payroll and time tracking scenario.  
**Covered Topics:**  
- Define a Period Schedule  
- Explore a Period Schedule  
- Edit a Period Schedule  
- Adjust Workday Time Tracking Security Policies  
**Required Prerequisites:** None
### Pooled Assets (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Learn how to use the pooling method of grouping to register assets from supplier invoices or supplier receipts.  
**Covered Topics:**  
- Pooled Assets Concept  
- Maintain Asset Pooling Rules Demo  
- Issue Purchase Order Demo  
- Create Receipt Demo  
- Review Trackable Receipt Lines Demo  
**Required Prerequisites:** None

### Pooled Budgets (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Learn what pooled budgets are, and how to use budget checking for different staffing models.  
**Covered topics:**  
- Payroll Commitment Process  
- Budget Checking for Staffing Models  
- Business Processes that Use Budget Checking  
**Required Prerequisites:** None

### Position Budgets Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library and Free Library  
**Description:**  
A Position Budget is the planned spend for a position in a fiscal year. It allows managers to track the payroll spend against a position.  
**Covered Topics:**  
- Overview of Position Budget Functionality in Workday  
- Configuration Prerequisites in HCM, Payroll and Financials
Preparation for Benefits Discovery (Free)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator and Managers and Employees
Prerequisites: None
Library: Free Library and HCM Core Library
Description:
This presentation discusses how to prepare for benefit enrollment.
Covered Topics:
- Benefit Plan Designs and Requirements
- Configure Workday to Meet Your Requirements
- Determine Functional Gaps

Preparation for Business Process Discovery (Free)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator and Executive
Prerequisites: None
Library: Cross Application/Technology Library and Free Library
Description:
This presentation is created by Workday to assist customers during deployment. It is designed to help customers understand the goals of the business process discovery workshop and how to prepare to get the most out of it.
Covered topics:
- Preparing for Business Process Discovery
- What to expect in your Business Process

Preparation for Compensation Discovery (Free)

Delivery Mode: Learn On-Demand
Audience: Executive
Prerequisites: None
Library: Free Library and HCM Core Library
Description:
This training is designed to provide customers a high level overview of compensation functionality and terminology in Workday. In addition it explains the goals of the Compensation Discovery session, how to prepare for it, and what to expect during it.
Covered topics:
- Compensation Discovery Workshop
- Compensation Overview

Required Prerequisites: None
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<tr>
<th><strong>Preparation for Global Design Discovery (Free)</strong></th>
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<td>This training is designed to help customers understand the goals of the Global Design Workshop and how to prepare to get the most out of it.</td>
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<tr>
<td><strong>Covered topics:</strong></td>
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<tr>
<td>• Global Design Workshop</td>
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<td>• Country-Specific Personal Data</td>
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<tr>
<td>• Global Configuration Options</td>
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<th><strong>Processing Hires and Contingent Workers (Subscription)</strong></th>
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<tr>
<td><strong>Description:</strong></td>
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<tr>
<td>This course will discuss how to complete the hire process for an applicant as well as how to contract a worker as a contingent worker in Workday.</td>
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<tr>
<td><strong>Covered Topics:</strong></td>
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<tr>
<td>• Processing Hires</td>
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<td>• Contract Contingent Workers</td>
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<tr>
<td>The purpose of this training is to demonstrate the steps necessary for processing stock awards.</td>
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<tr>
<td><strong>Covered Topics:</strong></td>
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<tr>
<td>• Introduction to Processing Stock Awards</td>
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<td>• Configure and Initiate the Stock Process Business Process</td>
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<tr>
<td>• Manage Multiple Compensation Events</td>
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<tr>
<td>• Configure, Distribute and Launch Pools</td>
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<tr>
<td>• Propose and Approve Employee Stock Grants</td>
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<tr>
<td><strong>Required Prerequisites:</strong></td>
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### Processing Terminations (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library

**Description:**  
This training gives an overview of the termination process and exit interview options in Workday.

**Covered Topics:**  
- Processing Terminations  
- Termination Exit Interview  
- Single Field Phone Number  
- Regrettable Enhancements

**Required Prerequisites:** None

### Procurement for Contingent Labor (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library

**Description:**  
Procure-to-pay functionality for contracting contingent labor will be covered in this training including creating job requisitions, contracting a contingent worker, issuing purchase orders, logging time, invoicing, and settling of payment. The topics to be covered include a brief discussion of set up needed required for the requisitioning functionality, demonstrations of Workday's Procure-to-pay functionality.

**Covered topics:**  
- Procurement for Contingent Labor: Requisition  
- Procurement for Contingent Labor: Contract and Purchase Order  
- Procurement for Contingent Labor: Receipt  
- Procurement for Contingent Labor: Invoice  
- Procurement for Contingent Labor: Payment

**Required Prerequisites:** None

### Procurement for Deliverable Services (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library

**Description:**  
Procurement functionality for task related projects will be covered in this training. The topics to be covered include a brief discussion of set up needed required for the requisitioning functionality, demonstrations of Workday's Procure-to-pay functionality.

**Covered Topics:**  
- Procurement for Deliverable Services: Requisition  
- Procurement for Deliverable Services: Sourcing/Purchase Order  
- Procurement for Deliverable Services: Receipt  
- Procurement for Deliverable Services: Invoice  
- Procurement for Deliverable Services: Payment

**Required Prerequisites:** None
### Procurement for Goods (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  

**Description:**
Procurement functionality for goods will be covered in this training. The topics to be covered include a brief discussion of setup needed required for the requisitioning functionality, demonstrations of Workday’s Procurement functionality.

**Covered topics:**
- Procurement for Goods: Requisition
- Procurement for Goods: Purchase Order
- Procurement for Goods: Receipt of Goods
- Procurement for Goods: Invoice
- Procurement for Goods: Payment

**Required Prerequisites:** None

### Procurement Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library and Free Library  

**Description:**
You will learn about Workday’s Procurement options and how they fit into Workday’s Business Process Framework, Security, and other applications. Included is a discussion of the events included in a procurement process and the types of spend Workday supports.

**Covered topics:**
- Overview of Workday Procurement
- Types of Spend
- Procurement Process Flow
- Procurement Business Processes
- Supplier Collaboration Concept
- Security In Procurement

**Required Prerequisites:** None

### Procurement: Matching (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  

**Description:**
Did you go Live with Workday without Procurement Matching? If so, check out these easy to view concepts that will help you to configure this feature. You will learn how to configure match condition rules, rule sets, and exception reasons.

**Covered Topics:**
- Match Events and Exception Events
- Receipts and Invoices
- Change Orders
- Supplier Contract Events

**Required Prerequisites:** None
Projects and Work Management Overview (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: Financials Library and Free Library

Description:
In this presentation, you will learn how the power of Workday's unified solution can help you identify the right resources to staff your projects by leveraging information already in your system.

Covered Topics
- Projects and Work Management
- Project Staffing
- Time Tracking

Required Prerequisites: None

Proxy Access Policy (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Cross Application/Technology Library

Description:
This training will introduce you to the proxy access policy and how to configure it with multiple rules. Proxy access allows a user to proxy in as other users for testing purposes.

Covered Topics:
- Proxy access policy with a single configured rule
- Multiple rows assessments
- Policy configuration for multiple rules

Required Prerequisites: None

Purging Candidates (Subscription)

Delivery Mode: Learn On-Demand
Audience: Functional Lead and Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
To help your organization comply with data protection regulations, Workday enables you to purge candidates’ personally identifiable information using a custom report. This training covers how to purge candidate data from your tenant.

Covered Topics:
- Overview of purging person data in Workday
- Creating a custom report for candidate purging
- Purging candidate data

Required Prerequisites: None
Purpose and Setup of Custom Labels (Free)

Delivery Mode: Learn On-Demand

Audience: Integration Lead, Functional Lead, and Workday Administrator

Prerequisites: None

Library: Free Library and HCM Core Library

Description:
This presentation provides information about replacing Workday field labels with labels that more accurately reflect the way you do business.

Covered Topics:
- Purpose of Custom Labels
- Term Context
- Setup Custom Labels

Required Prerequisites: None

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Questionnaires Within a Business Process (Subscription)

Delivery Mode: Learn On-Demand

Audience: Workday Administrator

Prerequisites: None

Library: Cross Application/Technology Library

Description:
Workday provides you with the ability to include a questionnaire as part of a business process. This enables you to gather relevant information during the business process. You can create questionnaires with questions that are configurable and reusable.

Covered Topics:
- Verifying business process access to questionnaires
- Supported question types
- How to create questions and branching questions
- Creating questionnaires within a business process
- Assigning questionnaires to a business process and security group

Required Prerequisites: None

Recommended Prerequisites: None

---

Record Award Proposals (Subscription)

Delivery Mode: Learn On-Demand

Audience: Workday Administrator

Prerequisites: None

Library: Education/Government Library and Financials Library

Description:
Record Award Proposals gives you the ability to track core information about your award proposals. Award Proposal information can later be converted to an award.

Covered topics:
- Introduce and Configure Award Proposals
- Create an Award Proposal
- Create an Award Proposal Budget
- Use an Award Proposal to Create an Award
- Use an Award Proposal Budget to Create an Award Budget
- Award Proposal Reporting

Required Prerequisites: None
Learn On-Demand

Record Voided Checks (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library

Description:
This job aid provides information about recording voided checks in Workday.
Covered Topics:
⦁ Record Voided Checks Task
⦁ Select Banks Account
⦁ Check Number, Date Voided, and Reason for Void

Required Prerequisites: None

Recruiting Analytics and Reporting (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User
Prerequisites: None
Library: HCM Core Library

Description:
In this course, you'll review compliance, analytic, and custom recruiting reports and learn how to configure the Time to Fill report and the Recruiting dashboard. You’ll also learn how to create a custom recruiting report.
Covered Topics:
⦁ Compliance reports for the United States
⦁ Delivered recruiting analytic reports
⦁ Configuring the Time to Fill report
⦁ The Recruiting dashboard
⦁ Creating custom recruiting reports

Required Prerequisites: None
Recurring Journal Templates (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User, Implementer, Internal, and Managers and Employees
Prerequisites:
Library: Financials Library
Description:
Certain journal entries must be processed with regular frequency in an accounting period. In this course, we’ll discuss how to use recurring journal templates to create recurring manual journals.
Covered Topics:
⦁ Create a recurring journal template.
⦁ Generate recurring journals from a template.
⦁ Validate newly created journals.
Required Prerequisites: None

Recurring Supplier Invoices (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User and Managers and Employees
Prerequisites:
Library: Financials Library
Description:
This training covers the configuration of a supplier invoice template.
Covered Topics:
⦁ Recurring supplier invoices
⦁ Fixed vs variable supplier invoices
⦁ Currency considerations
⦁ Installments
Required Prerequisites: None

Region Organizations (Subscription)

Delivery Mode: Learn On-Demand
Audience: Functional Lead, Workday Administrator, and Implementer
Prerequisites:
Library: Financials Library and HCM Core Library
Description:
After viewing this course, you will be able to define and create region organizations, use regions as worktags, and add an existing region to a regional hierarchy.
Covered topics:
⦁ Defining and creating regions.
⦁ Regions as worktags.
⦁ Regional hierarchies.
Required Prerequisites: None
# Reorganization (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  

**Description:**
What exactly is a reorganization event and how is it managed? While it is basically a change in the structure of an organization, would you know how to perform one if necessary or know if your role was authorized to do so? This course covers everything you need to know to change the structure of a supervisory organization. In it you will learn what administrative roles are responsible for managing supervisory organizations and become familiar with reorganization tasks and reports. The impact of a supervisory organization hierarchy change to progress business processes, such as hire and job changes and the reports available to track these types of changes will also be covered.  

Covered topics:  
- Create Reorganization Event  
- Create Subordinate Organization  
- Assign Superior Organization  
- Divide Organization  
- Moving Workers in a Reorganization  
- Inactivate Organization  

**Required Prerequisites:** None

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# Report Writer Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  

**Description:**
Report Writer is a built-in, easy-to-use, custom solution for actionable reporting. This training provides a basic introduction to Workday Report Writer functionality and demonstrates how to copy an existing report, use the output, and also create a custom report from scratch.

Covered Topics:  
- Report Writer Introduction  
- Copy and Edit Reports  
- Using Report Output  
- Create Custom Report  

**Required Prerequisites:** None
Reprint Checks and Reassign Check Numbers (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
For instances in which the Workday assigned check number and the number on the check stock are out of sync, check numbers can be reassigned and the checks reprinted. This job aid details the options for reprinting checks.  
**Covered Topics:**  
- Reprint Check Using Same Check Numbers  
- Reprint Checks: Next Check Number in Printer  
- Manually Enter Check Numbers  
- Manually Enter Range of Check Numbers  
**Required Prerequisites:** None

Request Compensation Change (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This training outlines the basic functions of compensation, such as how to view compensation and request a compensation change for a direct report.  
**Covered Topics:**  
- View Compensation  
- Request Compensation Change  
**Required Prerequisites:** None

Request Framework (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Implementer  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
The request framework enables users and provides them with the ability to request changes within the Workday system. Changes can include items such as creating new security groups, changes to an organization or even changes to an expense approval process.  
**Required Prerequisites:** None
### Revenue Management: Customer Contracts (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Customer contracts record the operational details of customer sales agreements, such as sales items or projects, payment schedules, and milestones. This training provides an overview of customer contracts and how they fit into Workday Revenue Management, and the customer contract business process.  
**Covered topics:**  
- What is a Customer Contract  
- Create and Approve a Customer Contract  
- Customer Contract Work Area  
**Required Prerequisites:** None

### Revenue Management: Customer Contracts Billing (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
This training will discuss Customer Contract Billing functionality and how it fits into Workday’s Revenue Management solution.  
**Covered Topics:**  
- Contract Billing Overview  
- Create a Billing Schedule for a Customer Contract  
- Create an Invoice for a Customer Contract  
**Required Prerequisites:** None

### Revenue Management: Customer Contracts Revenue Recognition (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
In this training, we will explore the Customer Contract Revenue Recognition functionality, a key component of Revenue Management.  
**Covered Topics:**  
- Revenue Recognition Overview  
- Revenue Recognition Scheduling, Accounting, and Reporting  
**Required Prerequisites:** None
Revenue Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Financials Library and Free Library  
**Description:**  
Workday Financials provides all of the tools you need to manage your organization's revenue. See how you can schedule your revenue recognition, find out what additional training is available on revenue management, and more!  
**Covered Topics:**  
- Revenue Overview  
- Revenue Training  
**Required Prerequisites:** None

Review Trackable Lines for Assets (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Are you interested in optimizing your Assets business processes? Learn how to add a step that will enable you to review the lines in an invoice or receipt prior to registering your assets. By reviewing trackable lines for assets, you can easily change the accounting treatment or approve the capitalization of an asset.  
**Covered Topics:**  
- Security Group Settings  
- Adding a Step to the Business Process  
**Required Prerequisites:** None

Rule-Based Business Process Calendar (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
In this course, you will learn how to set up a rule-based calendar configuration for a business process. A rule-based calendar allows you to enable due dates and step delays based on work and holiday calendars. You will create condition rules for a business process to use the organization's work and holiday calendars, and see how it impacts the organization.  
**Covered Topics:**  
- Overview of the rule-based calendar configuration  
- Set up a rule-based calendar  
- Review considerations for a rule-based calendar configuration  
- Create a calendar with multiple condition rules  
**Required Prerequisites:** None
Search Report (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:** Search report types allow you to build 'find' type reports, where searching can be easily narrowed using facet filters in the left frame, with search results configured on the right. Search reports require the use of an indexed data source. We will demonstrate how to build a searchable Expertise Finder search report, showing how to configure mass actions and the value of this feature.  
Covered topics:  
- Search Reports  
- Create a Search Report  
- Test and Run a Search Report  
**Required Prerequisites:** None

Secure Data and the sFTP Server (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:** This training is one in a series created by Workday to assist customers during deployment. It's designed to explain to customers the importance of securing data and the mechanisms that Workday uses to transfer data in a secure manner.  
Covered Topics:  
- Terms to Know  
- The sFTP Server  
- Public and Private Key Generation  
- sFTP Lifespan  
- Links  
**Required Prerequisites:** None

Security Groups and Uses (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:** This course will provide an understanding of the Workday security framework, specifically focusing on how security groups are configured.  
**Required Prerequisites:** None
**Segment Based Security Groups (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
This curriculum focuses on segment based security groups. Through presentation and demonstrations the learner should be able to configure, activate and test segment based security groups.  
Covered topics:  
- Segment-Based Security Overview  
- Configure Segment Based Security  
- Activate and Test Security Policy Changes  
**Required Prerequisites:** None

**Settlement Dashboard (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Explore the visualizations, reports and metrics that can be made using the new Settlement dashboard. This course explores the dashboard, its features, how to configure it and add it to the home page.  
Covered topics:  
- Overview of the Settlement dashboard, including differences from the Settlement Work Area  
- Add the Settlement dashboard to your Home Page  
- Explore the key worklets, default tasks and reports available for the Settlement dashboard  
- Configure the Settlement dashboard  
**Required Prerequisites:** None

**Settlement: Positive Pay Files (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User and Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**  
Positive Pay is a cash management service offered by banks that helps to deter check fraud. In this course, we'll explore Workday Positive Pay Files for check printing, learn what they are, and review the options available for configuring and creating positive pay files in Workday.  
Covered topics:  
- Positive Pay File Basics  
- Positive Pay File Creation for In-house Checks  
- Positive Pay File Creation for Outsourced Checks  
**Required Prerequisites:** None
Setup Period Close Activity Groups (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Implementer  
**Prerequisites:** Financials Library  
**Description:**  
Workday allows you to configure custom Period Close Activity Groups. This gives you greater control over the close process when updating ledger period status. This video will walk you through setup and use of Period Close Activity groups.

**Covered Topics:**  
- Security Configuration  
- Maintain Period Close Activity Groups  
**Required Prerequisites:** None

Shared Participation Merit Process (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** HCM Core Library  
**Description:**  
This training is designed to assist Compensation Administrators with the Merit Compensation Process. It is recommended that you watch this curriculum in the order listed below.

**Covered Topics:**  
- Introduction to the Merit Process  
- Compensation Matrices  
- Create a Merit Plan  
- Compensation Process Template  
- Rollout Compensation Plan  
- Compensation Configurable Grid  
- Initiate Merit Process  
- Manage Impacted Employees  
- Configure, Distribute, and Launch Pools  
- Complete Employee Awards  
- Release Merit Statement  
**Required Prerequisites:** None
Sourcing Goods from Storage (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Financials Library

**Description:**  
In this series, you will learn how to Source Goods from Storage. Sourcing Goods from Storage allows you to assign physical locations to assets, place the assets into a storage location, and fill requisitions from resources available in storage. This series takes you through the steps from the purchase order, receipt, requisition, and finally sourcing from storage.  

**Covered Topics:**  
- Order and Receive Goods  
- Source a Requisition from Storage  
- Configuration Considerations for Sourcing  

**Required Prerequisites:** None

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Spend Authorizations (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Financials Library and HCM Core Library

**Description:**  
Spend authorizations enable employees to obtain pre-approval for anticipated expenses, before they enter their actual expenses in the system. This training demonstrates how to create and approve a spend authorization from the perspective of employees and managers involved in the transaction. We’ll also cover creation of expense reports using existing spend authorizations and the closing or mass closing spend authorizations. In addition we will cover commitment accounting, budget checking and freeze of company spend along with the tenant configuration required to uptake these features.  

**Covered topics:**  
- Spend Authorization Overview  
- Tenant Configuration  
- Creating Spend Authorizations  
- Expense Reports from Spend Authorizations  
- Closing & Mass Closing Spend Authorizations  
- Approve a Spend Authorization  

**Required Prerequisites:** None
Staffing Models: Job Management Overview (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Executive
Prerequisites: Free Library and HCM Core Library
Description:
This training is designed to explain the two staffing models available in Workday: Position Management and Job Management. Watch this module to prepare for the Staffing Workshop, in which customers select a staffing model.

Covered Topics:

• Staffing Model Definition
• Types of Staffing Models
• Hiring Restrictions
Required Prerequisites: None

Staffing Models: Position Management Overview (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, Workday Administrator, and Executive
Prerequisites: Free Library and HCM Core Library
Description:
This training is designed to explain the two staffing models available in Workday: Position Management and Job Management. Watch this module to prepare for the Staffing Workshop, in which customers select a staffing model.

Covered Topics:

• Staffing Model Definition
• Types of Staffing Models
• Hiring Restrictions
Required Prerequisites: None

Staffing Positions: Creating Positions (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: HCM Core Library
Description:
Every supervisory organization is tied to a distinct staffing model. In this training, you will tackle the differences between staffing models so that you will be able to successfully hire an employee into a variety of organizations. You will build new positions under the Position Management staffing model, and set hiring restrictions for Job Management. For new and existing employees with responsibility for performing HCM transactions on Workday.

Covered Topics:

• Create Positions Using Job Management
• Creating Positions Using Position Management
Required Prerequisites: None
Staffing Positions: Job Profiles (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library
Description:
In order to create and fill positions within a supervisory organization a generic definition, or a job profile, must first be defined. This presentation provides an introduction to the Workday job catalog, offering a closer look at job profiles. You will also observe how hiring restrictions are used in conjunction with job profiles to define new positions. For new and existing employees with responsibility for performing HCM transactions in Workday.

Covered Topics:
⦁ What is a Job Profile?
⦁ Job Catalog Hierarchy
⦁ Hiring Requirements
⦁ Combining Profiles and Requirements

Required Prerequisites: None

Staffing Positions: Managing Positions (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library
Description:
This training will help you to best manage existing positions in the face of a variety of circumstances. You will learn how to edit either filled or unfilled positions when a situational change occurs, close positions in the case of terminations or transfers, and manage a hiring freeze. For new and existing employees with responsibility for performing HCM transactions on Workday.

Covered Topics:
⦁ Change an Employee Location
⦁ Close a Position
⦁ Freeze a Position

Required Prerequisites: None

Student Charges (Subscription)

Delivery Mode: Learn On-Demand
Audience: Functional Lead and Workday Administrator
Prerequisites:
Library: Education/Government Library
Description:
In this course, you will learn how to configure student charges in Workday. You will create charge due date rules, charge adjustment schedules, and student charge items. You will also assign student charges.

Covered Topics:
⦁ Student charges overview
⦁ Create charge due date rules
⦁ Create student employment verification rule sets
⦁ Create charge adjustment schedules
⦁ Assign student charges

Required Prerequisites: None
Learn On-Demand

Student Employment (Subscription)
Delivery Mode: Learn On-Demand
Audience: Business User, Functional Lead, and Workday Administrator
Prerequisites: 
Library: Education/Government Library
Description:
This training focuses on how to configure Workday Student to hire a student employee. You will learn how to configure student employment verification rules and rule sets, and how to hire a student employee with employment verification rules in place.
Covered Topics:
⦁ Hire Student business process
⦁ Student employment verification rules
⦁ Student employment verification rule sets
⦁ Hire Student task
Required Prerequisites: None

Student Recruiting: Campaigns and Events (Subscription)
Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, Workday Administrator, Executive, and Managers and Employees
Prerequisites: 
Library: Education/Government Library
Description:
Learn how to create student recruiting cycles and campaigns, and assign student recruiters to those campaigns by viewing this demonstration.
Required Prerequisites: None

Student Recruiting: Mobile (Subscription)
Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, Workday Administrator, Executive, and Managers and Employees
Prerequisites: 
Library: Education/Government Library
Description:
This demonstration introduces you to Workday’s Student Recruiting mobile application. You’ll learn how recruiters can use this powerful functionality on any device: anytime and anywhere.
Required Prerequisites: None
### Student Recruiting: Prospect Management (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:** None  
**Library:** Education/Government Library  
**Description:**  
This course provides an overview of Student Prospects, its core functionality, and how it relates to Workday's Student Recruiting.  
**Covered Topics:**  
- Student Prospects Overview  
- Create Student Prospect  
- Update Student Prospect Record  
- Merge Duplicate Student Prospects  
**Required Prerequisites:** None

### Student Recruiting: Regions and Recruiters (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, Executive, and Managers and Employees  
**Prerequisites:** None  
**Library:** Education/Government Library  
**Description:**  
In this demonstration, you'll learn about Student Recruiting Regions, how to create Student Recruiters, and how to assign your recruiters to student prospects.  
**Required Prerequisites:** None
Student Recruiting: Reports (Subscription)

Delivery Mode: Learn On-Demand

Audience: Functional Lead, Workday Administrator, Executive, and Managers and Employees

Prerequisites:

Library: Education/Government Library

Description:
In this course, you’ll be introduced to Student Recruiting and take a look at how it works within Workday Student. After you complete these trainings, you’ll understand the basics of Student Recruiting.

Covered Topics:
Introduction to Student Recruiting
⦁ Student Recruiting Concepts
⦁ Student Recruiting Business Processes
⦁ Student Recruiting Glossary
⦁ Student Recruiting Crossword

Regions and Recruiters
⦁ Student Recruiting: Regions and Recruiters

Campaigns and Events
⦁ Create Campaigns and Additional Setup for Recruiting Events
⦁ Student Recruiting Event Tasks

Student Prospects
⦁ Required Prerequisites: None

Supplier and Contract Management Overview (Free)

Delivery Mode: Learn On-Demand

Audience: Workday Administrator

Prerequisites:

Library: Financials Library and Free Library

Description:
In this course, we’ll look at how Workday can help you to manage your organization's suppliers and supplier contracts. We’ve also included a list of all of the training available on supplier and contract management in Workday.

Covered topics:
⦁ Supplier and Contract Management Overview

Required Prerequisites: None
### Supplier Self-Registration (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:**
Learn how suppliers can now enter their data directly into a secure external website, saving your supplier administrators from a manual process that in the past has seen much incomplete and inaccurate data.  
**Covered topics:**
- Create an external supplier site  
- Configuring goods and services for a supplier  
- Perform self-registration as a supplier  
- Examine the approval process  
- List related supplier portal changes

**Required Prerequisites:** None

### Surveys (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, Implementer, and Managers and Employees  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**
In this course, you will learn how to build a survey and describe its components. You will also learn how to create and send surveys, view the results, and identify key survey reports in Workday.  
**Covered topics:**
- Survey Introduction  
- Create Surveys  
- Manage Surveys  
- View Survey Reports

**Required Prerequisites:** None
Learn On-Demand

Talent Management: Competencies (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: 
Library: HCM Core Library
Description:
A competency is a set of defined behaviors that provide a structured guide, enabling the identification, evaluation, and development of the behaviors in individual employees. In Workday, worker competencies are rated as part of performance. Upon completion of this training, you should understand key competency concepts. You should be able to create a Competency; set up a Competency Category, Competency Class, and Proficiency Rating Scale. You should also be able to assign, update, and compare competencies. Finally, you should understand how to generate an Employee Talent Card.

Covered Topics:
- Competency Basics
- Set Up and Create Competencies
- Set Expected Competency Levels
- Updating Competencies
- Comparing Competencies
- Generating a Talent Card

Required Prerequisites: None

Talent Overview (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: 
Library: Free Library and HCM Core Library
Description:
This training provides an overview of Talent Management in Workday. You’ll learn how competencies are used to define skills, behaviors and attitudes for workers, leverage talent reviews to measure employee performance, use calibration to assess performance and potential, use succession planning to identify members of your workforce who can move into key jobs and positions in the future. You’ll also gain insights into Talent data touch points that can be leveraged across other parts of Workday.

Covered Topics:
- Talent Overview
- Competencies
- Talent Reviews
- Calibration
- Succession Planning
- Touch Points

Required Prerequisites: None
Talent Planning and Analytics (Subscription)

Delivery Mode: Learn On-Demand
Audience: Business User, Workday Administrator, and Executive
Prerequisites:
Library: HCM Core Library

Description:
Have you been looking for a way to predict and analyze your headcount supply and demand? View this presentation to maximize your talent using the available analytic functionality.

Covered Topics:
- Headcount Supply & Demand Report Workflow
- Headcount Supply & Demand Analytics Template Configuration Steps
- View Report in Workforce Planning Worklet

Required Prerequisites: None

Talent Succession: Assessing Potential (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library

Description:
In order to better focus the future of your workforce, this training will enable you to identify employees’ potential, achievable promotion level, retention risk, and loss impact. You will learn how to configure the set up codes for these items and then perform the assessment.

Covered Topics:
- Configure Potential Codes
- Enable Nomination Tracking
- Complete an Assessment
- Assess Potential in Volume

Required Prerequisites: None

Talent Succession: Business Process, Security, Worklets, and Dashboards (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites:
Library: HCM Core Library

Description:
Take charge of talent succession by learning to configure the related business processes, such as assess potential and manage succession plan. This training will help you make sure that the right people have access to the right tasks through coordination of the domain and business process security policies.

Covered Topics:
- Talent Succession in Business Processes
- Domain and Business Process Security Policies
- Configure Worklets for Succession and Talent

Required Prerequisites: None
Talent Succession: Succession Planning (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Workday Administrator

**Prerequisites:**

**Library:** HCM Core Library

**Description:**
A succession plan helps to organize employees who are candidates to fill a position, based on their readiness for that position. This module will broaden your understanding of talent succession by detailing the production of readiness codes and the subsequent creation of a succession plan. In addition, you will learn about the reports available for effective succession management.

**Covered Topics:**
- Maintain Readiness Codes
- Find Succession Plan Report
- Create Succession Plan
- Use other Succession Plan Reports

**Required Prerequisites:** None

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Talent: Configuring the Opportunity Graph (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Workday Administrator

**Prerequisites:**

**Library:** HCM Core Library

**Description:**
In this training, you’ll learn what the opportunity graph is, gain an understanding of its benefits, configure security domains and job profile information, and be able to view the opportunity graph via employee self-service.

**Required Prerequisites:** None

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Tenant Analyzer (Subscription)

**Delivery Mode:** Learn On-Demand

**Audience:** Workday Administrator and Implementer

**Prerequisites:**

**Library:** Payroll/Absence/Time Tracking Library

**Description:**
- Define Tenant Analyzer and explain when to use it
- Run the Tenant Analyzer for a Payroll use case
- Run the Tenant Analyzer for an Absence use case
- Use Payroll Reporting Validations to improve reporting performance

**Required Prerequisites:** None
Learn On-Demand

**Time Tracking Overview (Free)**

- **Delivery Mode:** Learn On-Demand
- **Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive
- **Prerequisites:**
- **Library:** Free Library and Payroll/Absence/Time Tracking Library
- **Description:**
  In this presentation, you will learn how the power of Workday's unified solution can be leveraged in Time Tracking to document project resourcing, spend and results.
  **Covered Topics:**
  - Time Tracking
  - Building Blocks of Time
  - Connections
  **Required Prerequisites:** None

**Time Tracking: Adjusting Calculated Time (Subscription)**

- **Delivery Mode:** Learn On-Demand
- **Audience:** Workday Administrator
- **Prerequisites:**
- **Library:** Payroll/Absence/Time Tracking Library
- **Description:**
  This training covers when and how to use the Adjust Calculated Time task. The demonstration covers how to adjust time using Calculation tags.
  **Covered topics:**
  - Use cases
  - How to adjust calculated time
  - Cautions to consider when performing this task
  **Required Prerequisites:** None

**Time Tracking: Configuring the Time Entry Template (Subscription)**

- **Delivery Mode:** Learn On-Demand
- **Audience:** Integration Lead, Functional Lead, and Workday Administrator
- **Prerequisites:**
- **Library:** Payroll/Absence/Time Tracking Library
- **Description:**
  The purpose of the time entry template is to control the appearance and behavior of the time entry calendar. Watch this training to learn how to configure a time entry template to meet your business needs, as well as better understand how the template affects time entry. This curriculum consists of two demonstrations
  **Covered Topics:**
  - Define and Create a Time Entry Template
  - View, Edit, and Delete a Time Entry Template
  **Required Prerequisites:** None
# Time Tracking: Configuring Time Entry Codes and Time Code Groups (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
Time entry codes are essential to time tracking because they define the units for entering time as well as specify the entry method. Time entry codes belong to time code groups, which are used to define eligibility requirements. This training details the function and configuration of these time tracking elements. This curriculum consists of two demonstrations and one job aid.  

**Covered Topics:**  
- Time Entry Codes  
- Time Code Groups  
- Increment For Hours Entry  
**Required Prerequisites:** None

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# Time Tracking: Defining a Period Schedule (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
Period schedules define consecutive periods for payroll processing, time tracking, or both. In combination with the pay period schedule, they determine when employees are paid for time worked. This training delivers the major components of a period schedule, including the function of several critical dates for time entry. It includes demonstrations on editing a period schedule and security policies for time tracking.  

**Covered Topics:**  
- Define a Period Schedule  
- Edit Period Schedule  
- Adjust Time Tracking Security Policies  
**Required Prerequisites:** None

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# Time Tracking: Defining the Work Schedule Calendar (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  
**Description:**  
This training will define the purpose of a work schedule calendar and explain where it is used in Absence and Time Tracking. It will cover how to create a work schedule calendar. It will explain the three methods in which a worker is assigned to a work schedule calendar.  

**Covered Topics:**  
- Review the purpose of and create a Work Schedule Calendar  
- Assign the new work schedule calendar to a worker  
**Required Prerequisites:** None
Time Tracking: Enter Time and Time Off (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
The time entry calendar allows you to enter time in a variety of ways, as well as easily edit or delete blocks of time. Upon completion of this training, you will be able to utilize time tracking to enter, edit, and submit time and time off. Designed for employees who are required to track their time using the time tracking time entry calendar.
Covered topics:
⦁ Enter Time
⦁ Enter Time Off
⦁ High Volume Time Entry
Required Prerequisites: None

Time Tracking: Entering Time and Time Off for a Worker (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
The purpose of this training is to demonstrate how to use the Time Tracking calendar features to enter, edit and submit time and time off for a worker, and how to approve time and time off for a worker.
Covered topics:
⦁ Enter and Edit Time for a Worker
⦁ Mass Enter Time and Mass Submit Time for a Group of Workers
⦁ Enter Time Off for a Worker
⦁ Review and Approve Time
Required Prerequisites: None

Time Tracking: Managing Exception Time Reporters (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Payroll/Absence/Time Tracking Library
Description:
This training provides an overview of managing exception time reporters.
Covered topics:
⦁ Define an exception time reporter
⦁ Locate and view a work schedule calendar
⦁ Execute the Mass Auto-Fill from Schedule task
⦁ Schedule the Mass Auto-Fill from Schedule task
⦁ Configure the Enter Time business process for exception time reporters
⦁ Execute the mass submit and mass approve tasks
⦁ Configure security for exception-time related tasks
Required Prerequisites: None
Learn On-Demand

**Time Tracking: Manually Advance the Enter Time Business Process (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  

**Description:**
In this training you will learn how to advance a business process and the security policy changes needed to advance the Enter Time business process. This training reviews how to use the Mass Advance Business Process task to move the Enter Time business process to the next step or to completion.  

Covered topics:
- Modify Security Policies  
- Manually Advance the Enter Time Business Process  

**Required Prerequisites:** None

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**Time Tracking: Time Calculations Configuration (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead and Workday Administrator  
**Prerequisites:**  
**Library:** Payroll/Absence/Time Tracking Library  

**Description:**
In this course, we’ll discuss the purpose of time calculations in Workday Time Tracking and review the key components to consider when configuring time calculations. We’ll examine the different types of time calculation templates. Finally, we’ll look at the results of these time calculations on a worker’s time entry calendar.  

Covered Topics:
- Time Calculations Overview  
- Time Calculation Templates  

**Required Prerequisites:** None

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**Time Zones for Business Processes (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  

**Description:**
Business process configuration tasks are timezone aware allowing users to activate changes immediately or on a specific date across multiple time zones.  

Covered Topics:
- Time Zones for Business Process Configurations  
- Benefits of Time Zone Aware Functionality  
- Change User Time Zone  
- Set Up Override Time Zone for Administrators  
- Time zone for step delay  

**Required Prerequisites:** None
Transposed Report (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: 
Library: Cross Application/Technology Library

Description:
The Transposed report type enables you to build a custom report where report rows are used as columns (that is, rows are transposed into columns). Building a Transposed report enables you to create reports that enable side-by-side comparisons (like when you compare workers using the Workbox feature) and to build related worklets for business process steps (sometimes called embedded intelligence) that show reference data in a side-by-side format. This training will demonstrate how this report format can be beneficial when trying to do comparisons on data that is typically provided in rows on the Advanced report type. First, we'll look at a report called Compare Talent by Organization, that we have formatted to group our worker's current performance metrics and potential. We'll take a look at how we set this up. Next, we will walk step-by-step with how to create a Transposed report to compare our suppliers for Global Modern Services, Inc. (USA). We will display important informal by Supplier General Information and Payment and Invoice Information. We'll walk through how to set this up and what the various options are when creating this report.

Covered topics:
- Transposed Report Overview
- View an Existing Transposed Report
- Create a Transposed Report

Required Prerequisites: None

Travel Journal Expenses Mobile (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator, Executive, and Managers and Employees
Prerequisites: 
Library: Financials Library

Description:
In this course, you will learn how to populate, review, and submit per diem travel journal expenses from your mobile device. This feature enhances travel journal expense functionality to improve convenience.

Covered Topics:
- Mobile Travel Journal Expenses Overview
- Generate Travel Journal
- Review Travel Journal

Required Prerequisites: None
### Troubleshooting and Resolving Studio Integration Errors (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  

**Description:**
Are you experiencing issues with integrations created using Workday Studio? Learn how to troubleshoot using the Studio Log File and the Consolidated Report. This training will walk through a common error scenario, demonstrating how to retrieve these log files in order to obtain information about the error. In addition, you will learn best practices for troubleshooting, and access links to other helpful resources.

**Covered Topics:**  
- Integration Components  
- Common Error: Expiring Job  
- Studio Log file and Consolidated Report  
- Best Practices  
- Additional Resources  

**Required Prerequisites:** None

### Troubleshooting and Resolving Unassigned Tasks (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  

**Description:**
This demonstration will discuss how to troubleshoot and resolve some of the more common unassigned tasks.

**Covered Topics:**  
- Troubleshooting a Disabled Account  
- Troubleshooting a Missing Role  

**Required Prerequisites:** None

### Understanding Data Validation (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  

**Description:**
Designed to explain what Workday means by Data Validation, who is expected to assist in Data Validation actives during a deployment, and the tools available.

**Covered topics:**  
- Data Validation Tasks  
- Approaches to Data Validation  
- Tools Used to Track Data Validation  

**Required Prerequisites:** None
**Understanding Integration IDs (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, and Workday Administrator  
**Prerequisites:** Cross Application/Technology Library  
**Description:** Integration IDs are essential to Workday's cross application functionality, ensuring that data is mapped accurately during integrations. This series will discuss how to use Reference IDs and Workday IDs within your EIB and Workday Studio integrations.  
**Covered Topics:**  
⦁ Integration ID Overview  
⦁ Reference IDs in EIB Integrations  
⦁ IDs in Inbound for XSLT  
**Required Prerequisites:** None

**Understanding the Foundation Tenant (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:** Free Library and HCM Core Library  
**Description:** Designed to explain the goals and process of the Foundation Tenant.  
**Covered topics:**  
⦁ Definition of an Foundation Tenant  
⦁ Purpose of the Foundation Tenant  
⦁ Data Gathering Workbook  
⦁ Tips for Data Gathering  
**Required Prerequisites:** None

**Usage Based Customer Contracts (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Implementer  
**Prerequisites:** Financials Library  
**Library:** Financials Library  
**Description:** Customer contracts document the operational details of customer sales agreements, such as sales items, billing, and payment terms. There are times when you will want to bill your customers based on usage, and recognize revenue accordingly. This requires defining different hourly rates to apply against varying billable hours. This course will provide detailed information about configuring customer contracts to manage usage based transactions.  
**Covered Topics:**  
⦁ Create a customer contract with a usage based line type  
⦁ Create a usage billing rate  
⦁ Create a billing schedule for a usage based contract line  
⦁ Record usage based transactions  
⦁ Approve billable usage based transactions  
⦁ Create a customer invoice for billable transactions.  
**Required Prerequisites:** None
### User-Based Security (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Cross Application/Technology Library  
**Description:**  
This training introduces the basics of creating and deploying security groups. Upon completion of this curriculum, you will be able to add a user-based security group to a domain security policy, activate the policy change, and then assign users to the group.  

**Covered topics:**  
- Create User-Based Security Group  
- Activate and Assign User-Based Security Group  

**Required Prerequisites:** None

### Workday Adoption: Planning Setup and Administration (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Implementer  
**Prerequisites:** None  
**Library:** Free Library and HCM Core Library  
**Description:**  
Workday Adoption is a functional area that will help customers unlock the full value of their Workday subscriptions. This functional area includes Workday Usage Metrics, Adoption Planning, and Adoption Navigator: Onboarding. By the end of this course, you should be able to explain how adoption planning can help your organization, set up a domain to use adoption planning, update required domain security policies for adoption planning functionality, and configure an adoption planning dashboard.  

**Covered topics:**  
- How adoption planning can help your organization  
- Set up a domain to use adoption planning  
- Update required domain security policies for adoption planning functionality  
- Configure an adoption planning dashboard  

**Required Prerequisites:** None

### Workday Adoption: Setup of Adoption Navigator (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:** None  
**Library:** Free Library and HCM Core Library  
**Description:**  
In this course, you’ll learn what the Workday Adoption functional area and Adoption Navigator are used for in Workday. You’ll also learn how to configure your tenant to use the Adoption Navigator, and how to configure Adoption Navigator dashboard content. Workday Adoption empowers customers to better understand how Workday is being used, identify opportunities for improvement, and share insights with management by providing a central hub for viewing and planning. In short, you’ll know what’s coming, be able to share it with others, and take action – all from within the Workday application.  

**Required Prerequisites:** None
Learn On-Demand

**Workday Adoption: Using Adoption Navigator (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator, Executive, and Implementer  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:**  
In this course, we'll look at how Workday can help you to manage your organization's suppliers and supplier contracts. We've also included a list of all of the training available on supplier and contract management in Workday. Covered topics:  
- Define the Workday Adoption functional area  
- Define Adoption Navigator  

**Required Prerequisites:** None

**Workday Adoption: Using Adoption Planning (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:**  
This course walks you through how to best use adoption planning to plan and prepare for releases. After viewing this course, you'll be able to explain when and how often to use adoption planning and articulate two possible use cases. Covered topics:  
- When and how often to use adoption planning  
- Articulate two use cases for adoption planning  

**Required Prerequisites:** None

**Workday Business Object Model (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library  
**Description:**  
Workday stores all information in business objects. Business objects link together, and are thus related to one another. The Workday business object model is the definition of these relationships. Upon completion of this training, you will be able to identify the purpose of business objects, and how they relate to one another, as well as apply your knowledge of the business object model.  
Covered Topics:  
- Object Management System  
- Business Objects  
- Class Report Fields  
- Workday Business Object Model  
- Application of the Model  
- Helpful Reports  

**Required Prerequisites:** None
Workday Customer Center: Understanding Tenant Management

**Description:**
A Workday tenant is an instance of the Workday software, including data that exists independently of other tenants. There are many types of deployment and production tenants, each intended for a specific use. Complete this module to achieve a better understanding of both deployment and production tenants, and how to best manage them throughout the deployment lifecycle.

**Covered topics:**
- What is a Tenant?
- Deployment Tenants
- Production Tenants
- Tenant Management
- Tenant Maintenance Requests

**Required Prerequisites:** None

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Workday Customer Center: Workday Support and Troubleshooting Processes (Free)

**Description:**
In this module, you will learn about the Workday Customer Center's support and troubleshooting process. This training is targeted towards employees assigned to the Named Support Contact role, for their company.

**Covered Topics:**
- Overview of Workday Support
- Outline roles and responsibilities of Named Support Contacts
- Troubleshooting Process

**Required Prerequisites:** None

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Workday Designer (Free)

**Description:**
Introduction to Workday Designer, how to edit and modify pages.

**Required Prerequisites:** None
Workday Endowment Accounting Terminology (for Education and Government) (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Education/Government Library and Financials Library
Description: A glossary of Workday endowment accounting terminology for Education and Government.

Workday Expenses Overview (Free)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: Financials Library, Free Library, and HCM Core Library
Description: Do you need an overview of the features and configuration options that are available to you in Workday Expenses? If so, this training is the place to begin as you explore Workday's solution for recording, monitoring and controlling expenses. Covered topics:
⦁ Workday Expenses
⦁ Related Business Processes
⦁ Spend Authorization
⦁ Credit Card Import
⦁ Expense Report
⦁ Payment Processing
⦁ Implementation Considerations
Required Prerequisites: None

Workday Grants Management Crossword Puzzle (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Education/Government Library and Financials Library
Description: This crossword puzzle is a pre-course activity for the Workday Grants Management Fundamentals: Post Award course. It is intended to “test” your knowledge of Workday and Workday Grants Management.
Required Prerequisites: None

Workday Grants Management Report Data Sources and Class Report Fields (Subscription)

Delivery Mode: Learn On-Demand
Audience: Workday Administrator
Prerequisites: None
Library: Education/Government Library and Financials Library
Description: A listing of report data sources (RDSs) and class report fields (CRFs) for Workday Grants Management.
Required Prerequisites: None
## Workday Integration Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:** Do you want to learn about Workday’s strategy and solutions for system integration? This course presents an overview of Workday's integration solution, discussing each item in the toolkit, its function, and how it fits into Workday's integration strategy.  
**Covered topics:**  
- The Integration Challenge  
- Web Services APIs  
- Workday Integration Tools  
- Community Resources  
**Required Prerequisites:** None

## Workday Learning Center: Navigation Basics (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Cross Application/Technology Library, Education/Government Library, Financials Library, Free Library, HCM Core Library, and Payroll/Absence/Time Tracking Library  
**Description:** This demonstration provides an introduction to the Workday Learning Center.  
**Covered topics:**  
- Navigating the Home Page  
- Search for Training  
- View Transcript  
- Helpful Resources  
**Required Prerequisites:** None
**Learn On-Demand**

**Workday Learning: Advanced Self-Service Functionality (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library

**Description:**  
This course provides an overview for super users (e.g., instructors and managers) for key functionality that is unique to each of their roles. For instructors, this includes how to access the instructor dashboard, view course calendar, grade and track attendance for courses they have been assigned to. For managers, it’s understanding the differences between their team enrollment option and mass enrollment completed by Learning Administrators.

**Covered Topics:**  
- Define key instructor functionality, including: class assignments, dashboard, calendar, grading, and attendance  
  - Configure instructor dashboard, including: describe key features, demonstrate navigation options, and discuss limitations  
  - Compare Manager team enrollment versus Learning Administrator’s mass enroll feature  
  - Turn on Manager team enroll  
  - Conduct Manager team enroll  
- **Required Prerequisites:** None

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**Workday Learning: Configuring Worklets, Sliders, and Dashboards (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:**  
**Library:** HCM Core Library

**Description:**  
This course provides an overview for Learning Administrators to set up and manage their tools, such as the worklets on the homepage, the sliders within the worklets, and the overall Dashboards.

**Covered Topics:**  
- Define key terms  
- Demonstrate how to add the Learning and Learning Administrator worklet to the homepage  
- Demonstrate how to add, configure and move sliders within a worklet  
- Demonstrate how to customize both the Learning and Learning Administrator dashboards  
- Comment on an offering

**Required Prerequisites:** None
Workday Learning: Creating Campaigns, Managing Waitlists, and Mass Enrolling (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This course provides instructions on some of the more advanced Learning Administrators functions included in Workday Learning.  
**Covered Topics:**  
⦁ Define key terms  
⦁ Create a campaign  
⦁ Create a campaign audience  
⦁ Set-up a waitlist  
⦁ Push a campaign  
⦁ Set-up a mass enrollment  
**Required Prerequisites:** None

Workday Learning: Creating Topics, Lessons, Courses, Offerings, and Surveys (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Functional Lead, Workday Administrator, and Implementer  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This course provides Learning Administrators and end-users a review of key terms used in Workday Learning content creation as well as how to create a topic, lesson, instructor, courses, and course offerings.  
**Covered Topics:**  
⦁ Define key terms  
⦁ Create a lesson  
⦁ Create an instructor  
⦁ Create course types  
⦁ Create an offering  
**Required Prerequisites:** None
Learn On-Demand

Workday Learning: Enrolling In, Dropping, Rating, and Commenting on Learning Offerings (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
This course provides an overview of key tasks and activities an end user will complete in Workday Learning.

Covered Topics:
• Define key terms
  • Enroll in an offering
  • Drop an offering
    • Rate an offering
  • Comment on an offering
  • Required Prerequisites: None

Workday Learning: Exploring Security Settings (Subscription)

Delivery Mode: Learn On-Demand
Audience: Integration Lead, Functional Lead, and Workday Administrator
Prerequisites: None
Library: HCM Core Library

Description:
This course provides Learning Administrators and end-users a review of key terms used in Workday Learning content creation as well as how to create a topic, lesson, instructor, courses, and course offerings.

Covered Topics:
• Define key terms
  • Create a lesson
  • Create an instructor
    • Create course types
    • Create an offering
      • Required Prerequisites: None
  •
Learn On-Demand

**Workday Learning: Managing Media (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Implementer  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This video provides an overview of the various ways individuals with correct security groups can set up content sharing and interactions, share content, add simple interactions and captions to videos.  
**Covered Topics:**  
⦁ Identify key steps to set up Media Sharing and Interactions  
⦁ Configure the proper domains  
⦁ Add My Media to Dashboards  
⦁ Identify key interaction types  
⦁ Describe how to add captions to video  

**Required Prerequisites:** None

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**Workday Recruiting Overview (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:**  
In this course, we'll provide an overview of the features, functionality, and benefits of Workday Recruiting. We'll also look at how it fits into Workday’s unified solution.  
**Covered Topics:**  
⦁ Overview of Features and Functionality  
⦁ Benefits  

**Required Prerequisites:** None

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**Workday Recruiting Using Mobile (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:**  
This training demonstrates general functionality and the recruiter and candidate experience using mobile for Workday Recruiting.  
**Covered Topics:**  
⦁ The recruiter experience on a mobile device  
⦁ The candidate experience on a mobile device  
⦁ Job Application business process tasks on a mobile device  
⦁ Recruiting reports and dashboards on a mobile device  

**Required Prerequisites:** None

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**Workday REST API (Free)**

Delivery Mode: Learn On-Demand  
Audience: Integration Lead and Workday Administrator  
Prerequisites:  
Library: Cross Application/Technology Library and Free Library  
Description: This job aid answers frequently asked questions asked by customers regarding the Workday REST API. You will learn about the available resources and documentation found in the Workday Community, as well as learn about the goals of the Workday REST API.  
**Required Prerequisites:** None

**Workday SaaSy Presentation with Jeff Pulver**

Delivery Mode: Learn On-Demand  
Audience: Business User and Implementer  
Prerequisites:  
Library: Education/Government Library  
Description: Watch Jeff Pulver, VP of Business Development, give his SaaSy presentation on Workday's past, present, and future.  
**Required Prerequisites:** None

**Workday Student Overview (Free)**

Delivery Mode: Learn On-Demand  
Audience: Integration Lead, Functional Lead, Workday Administrator, Executive, and Managers and Employees  
Prerequisites:  
Library: Education/Government Library and Free Library  
Description: In this course, you'll be introduced to Workday Student and take a look at its core functionality. After you complete these trainings, you'll understand the basics elements and uses of Workday Student.  
Covered Topics:  
• Workday Student Overview  
• Workday Student Training  
**Required Prerequisites:** None
### Workday Student: Academic Foundation (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, Executive, and Managers and Employees  
**Prerequisites:** None  
**Library:** Education/Government Library  
**Description:**  
This course focuses on Workday Student’s Academic Foundation. It will provide a high-level overview on the objects and processes used across existing Student applications including Student Recruiting and Campus Engagement.  
Covered Topics:  
- Academic Foundation Overview  
- Defining an Academic Structure  
- Setting up an Academic Structure  
- Academic Periods and Date Ranges  
- Optional Configuration for Academic Foundation  

### Workday Student: Campus Engagement (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Integration Lead, Functional Lead, Workday Administrator, Executive, and Managers and Employees  
**Prerequisites:** None  
**Library:** Education/Government Library  
**Description:**  
Campus Engagement leverages Workday’s advance set of tools and technologies to facilitate interactions between an institution and its constituents. To demonstrate the power of Campus Engagement, this course covers multiple tools to record and categorize information, and how this information can be used to provide insight about effectiveness of specific communications for an undergrad recruiting campaign.  
Covered Topics:  
- Create an Engagement Email Item  
- Create an Engagement Plan  
- Schedule an Engagement Run  
- Create an Engagement Conversation Record Using Conversation Worktags  

**Required Prerequisites:** None
Workday Student: Student Recruiting (Subscription)

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Integration Lead, Functional Lead, Workday Administrator, and Executive  
**Prerequisites:**  
**Library:** Education/Government Library  
**Description:**
This curriculum focuses on Student Recruiting and takes a look at how it works within Workday Student. After you complete this curriculum, you will understand the basics of Student Recruiting.  
**Courses:**

- Introduction to Student Recruiting  
- Prospect Management  
- Campaigns and Events  
- Mobile  
- Reports  
- Regions and Recruiters  
**Required Prerequisites:** None

Workday Web Services Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:**
Building integrations using Workday Web Services? Watch this training to learn how to navigate Workday’s Public Web Services. This training includes a discussion of how to access the Web Service API’s Web Service Description Language (WSDL) for Workday’s delivered Public Web Services and Custom APIs. This training is designed for users active in building integrations into and out of the Workday product suite.  
**Covered topics:**

- Overview of Workday Integration Architecture  
- Workday Public Web Services  
- Understanding WSDL  
- Reporting as a Service (RaaS) Custom APIs  
- Workday Studio Web Service Tester  
**Required Prerequisites:** None

Worker Trending Overview (Free)

**Delivery Mode:** Learn On-Demand  
**Audience:** Workday Administrator and Executive  
**Prerequisites:**  
**Library:** Free Library and HCM Core Library  
**Description:**
This training introduces the major concepts associated with worker trending, including the trended workers data source and the Workday-delivered trending reports. Upon completion of this curriculum, you will be able to complete the steps for implementing worker trending.  
**Covered Topics:**

- Worker Trending Overview  
- Implement Worker Trending  
**Required Prerequisites:** None
Learn On-Demand

**Working with Multiple Jobs (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, Workday Administrator, Implementer, Internal, and Managers and Employees  
**Prerequisites:**  
**Library:** HCM Core Library  
**Description:** This video demonstrates how to configure Workday to manage employees with multiple jobs. By the end of this video, you should be able to configure your tenant for multiple jobs. You should also be able to hire into an additional job, run reports on multiple jobs, and end an additional job.  
**Covered Topics:**  
- Setting Up Multiple Jobs  
- Using the Add Job Business Process  
- Maintaining Multiple Jobs and Ending an Additional Job  
**Required Prerequisites:** None  
**Recommended Prerequisites:** None

**Worksheets Basics (Free)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Workday Administrator, Executive, and Managers and Employees  
**Prerequisites:**  
**Library:** Cross Application/Technology Library and Free Library  
**Description:** Workday Worksheets is a cloud-based spreadsheet technology within Workday that enables ad hoc data exploration, analysis, and collaboration with live data. This course will introduce you to the basics of Workday Worksheets to help you get started, and includes demonstrations on how to access, create, and manage your workbooks. You will also learn how to export data from Workday Report Writer reports, import live data, leverage collaboration features, and access helpful reference material as you begin to further explore Worksheets functions and features.  
**Covered Topics:**  
- Accessing Workday Worksheets  
- Creating workbooks  
- Exporting and importing live data  
- Managing workbooks  
- Sharing and collaboration  
- Setting workbook permissions  
- Accessing Workday worksheets resources  
**Required Prerequisites:** None

**Year End Budget Process (Subscription)**

**Delivery Mode:** Learn On-Demand  
**Audience:** Business User, Functional Lead, and Workday Administrator  
**Prerequisites:**  
**Library:** Financials Library  
**Description:** In this training, we will review how to roll budgetary balances forward to a new year.  
**Covered Topics:**  
- Budget Year End Processing  
- Budget Treatment Rules  
- Budgetary Roll Forward and Close  
**Required Prerequisites:** None