

Instructor-Led Training Courses

Training courses were designed only for those roles that execute high impact transactions in Workday, meaning that not all security roles will have associated required training. If you hold one or more of the security roles listed below, you are required to take the associated training course(s).

- Each instructor-led training course is **also available as a self-paced course**. You can **take either the instructor-led or the self-paced version** of the course(s) relevant to your security role(s), depending on your preference and learning style. Majority of self-paced courses will be available in Workday Learning by go-live; additional self-paced courses will be published post go-live.
- **Instructor-led training has begun**; courses are scheduled throughout the months of **May and June**, with more sessions to be added post go-live.
- The courses below have been **assigned in Workday Learning to employees holding the relevant role(s)**. As additional role assignments are completed, **courses will be assigned accordingly**.
- Each course covers **objectives and transactions specific to the security role(s)** that will be performing these transactions in Workday.
- Before completing your required role-based training course(s), you will need to complete **Introduction to Workday Financials**, the prerequisite self-paced course, which is **available in the Workday Learning Program**. (You only need to take the prerequisite course once.)

Course Title	Security Role
Accounting Journals And Accounting Adjustments	Accountant
Customer Accounts	Customer Billing Specialist & Customer Contract Specialist
Expense Reports For Expense Ambassadors	Expense Data Entry Specialist
Gift Creation	Unit Gift Manger
Grants Management	Grant Manager
Internal Service Delivery	Internal Service Delivery Data Entry Specialist
Payroll Accounting - Costing Allocation	Payroll Costing Manager & Payroll Costing Specialist
Payroll Accounting - HCM Subtasks	Payroll Costing Manager
Petty Cash Account Replenishment	Petty Custodian
Reviewing Ad Hoc Bank Transactions	Cost Center Deposit Specialist

Self-Paced Training Courses

The courses below are offered **only as self-paced training courses** in Workday Learning; they are not offered in instructor-led format.

- Unlike instructor-led training courses, self-paced courses will not appear in your Workday Learning Program. To enroll in and complete the relevant course(s) below, you must **search** for the course(s) in Workday Learning.
- Majority of self-paced courses will be available in Workday Learning by go-live; additional self-paced courses will be published post go-live.
- Before completing your required role-based training course(s), you will need to complete **Introduction to Workday Financials**, the prerequisite self-paced training course, which can be found by searching the course title using the search bar within Workday Learning. (You only need to take the prerequisite course once.)
- You can **take as many self-paced training courses** as you wish, regardless of your security role.

Course Title	Security Role
Account Certification	Recommended for the following roles: Cost Center Fiscal Specialist, Cost Center Manager, Grant Account Certifier, Grant Financial Analyst, Project Budget Manager, Project Budget Specialist, and Unit Gift Manager (non-allocated gifts). <i>This list of roles is used to determine the Approver and Preparer roles for Account Certifications generated each month.</i>
Cost Center Manager Approvals	Recommended for Cost Center Manager
Customer Contracts and Billing Installments	Recommended for Customer Contract Specialist
Expense Reports	Required for Expense Support Specialist; recommended for all employees
Introduction to Workday Financials	Required as a prerequisite for all required training; recommended for all employees
Payroll Accounting – Accounting Adjustments	Required for Payroll Accounting Adjustment Specialist
Purchase Requisition	Recommended for all employees
Purchase Requisitions, Purchase Orders and Supplier Invoice Requests	Required for Procurement Shopper
Reporting	Recommended for all employees
Introduction to Budgeting in Adaptive Planning	Recommended for all employees

Security Roles That Do Not Have Required Training – What Resources Are Available?

The security roles below do NOT have associated required training:

Award Analyst Cost Center Financial Analyst Cost Center Fiscal Specialist Cost Center Manager Grant Account Certifier	Grant Financial Analyst Grants Compliance Reviewer Internal Service Provider Manager Multi Funding Source Access P2P Approver	Project Budget Manager Project Budget Specialist Senior Department Finance Approver Sponsored Programs Manager (Cost Center)
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Resources available:

1. **Enroll in and complete Introduction to Workday Financials** and any other self-paced course available in Workday Learning. All self-paced courses can be accessed by searching the course title using the search bar within Workday Learning. (All courses listed on slides 1 and 2 will be available as self-paced courses by go-live.)
2. **Access the [Security Roles: Day in the Life Summaries](#) resource** to learn more about the actions you can execute in Workday Financials based on your security role.
3. **Review relevant Quick Reference Guides (QRGs)** related to Workday navigation, approvals, dashboards, delegation, and more. QRGs will continue to be added to the [training webpage](#).
4. **Complete any additional courses that may be forthcoming.** Should a course relevant to your security role(s) be developed and deployed, you will be notified via email communication.
5. **Attend Office Hours** for additional Workday demonstrations and opportunities to practice transactions relevant to your security role(s).
6. **Utilize [Workday Digital Assist](#)**, which offers on-screen process guidance and step-by-step assistance in real time.
7. **Review recordings and slides from [FST Friday sessions](#)** for role-based day-in-the-life previews of specific Workday topics, including Foundation Data Model (FDM); Procurement; Reporting; and transactions that all employees can execute in Workday (e.g., creating expense reports, assigning carts).