

Business Process Overview

Users can use the work instruction worklet to access the work instructions directly in Workday.

- Open Work Instruction.
- Open a second window of Workday and have the work instruction side by side with the task.

Prerequisites

• N/A

Policy Reference Material

• N/A



Steps – Use the Work Instruction Worklet

1. Starting on the homepage, click the **Work Instructions** worklet.



2. The **Work Instructions** page displays.

Q Search				¢ e
Work Instruction	าร			
Departmental Work Instruc	tions		٥	Training Videos
Functional Area - Workday Role	Task	Task Description	Work Instructions	HCM (PeopleSoft Position Management, R
Banking & Settlement - Department Entry (PeopleSoft Role)	Departmental Deposits	Use the Department Entry task in PeopleSoft CS to make departmental deposits.	ASU_FMS_WI_Department Entry.pdf	
Basic Navigation - All Users	Configure Worklets	Configure Worklets to add, or remove worklets on your Workday homepage.	ASU_FMS_WI_Configure Worklets.pdf	Create an Expense Report for Ser
Basic Navigation - All Users	Create a Request	Create a Request to create or modify a Cost Center, Gift, Program, Project, Recurring Invoice or Reporting Values.	ASU_FMS_WI_Create a Request.pdf	Approve an Item
Basic Navigation - All Users	Add/Delete Favorites	Add or delete Favorites to save tasks, reports and business objects you use most often	ASU_FMS_WI_Favorites.pdf	Create and Inventory Stock Request
Basic Navigation - All Users	Inbox Approval	Use Inbox Approval to approve, deny or cancel items that require approval.	ASU_FMS_WI_Inbox Approval.pdf	Create a Receipt and Return a Purchase to
Basic Navigation - All Users	Inbox	Manage items in your inbox and your archive.	ASU_FMS_WLInbox.pdf	View Inventory in Workday
Basic Navigation - All Users	Mobile Applications	Download Workday's mobile applications.	ASU_FMS_WI_Mobile_Application.pdf	Run Grants Reports
Basic Navigation - All Users	Notifications	Manage notifications associate with a business step.	ASU_FMS_WI_Notifications.pdf	Purchasing in Workday
Basic Navigation - All Users	Search Bar Page	Use the Search Bar to search items and business processes.	ASU_FMS_WI_Search Bar.pdf	
Expenses - Data Entry Spend Specialist	Create Expense Report for Non - Worker	Create an expense report to reimburse an interviewee or other non-ASU affiliate.	ASU_FMS_WLCreate Expense Report for Non-	Create an Expense Report for a Worker or
Expenses - Data Entry Spend Specialist	Create Expense Report for Worker	Create an expense report to reimburse an employee other than yourself.	ASU_FMS_W_Create Expense Report for Worker off	Departmental Receipting
Expenses - Data Entry Spend Specialist	Create Expense Report	Create an expense report to reimburse yourself for expenses incurred while doing business on behalf of ASU.	ASU_FMS_WI_Create Expense Report.pdf	Create an Internal Service Delivery
Expenses - Data Entry Spend Specialist	Create External Committee Member	Creates an external committee member which will be used to select the non-worker for the expense report for non-ASU affiliates.	ASU_FMS_WLCreate External Committee	Non-Stock Gas Requisition
Expenses - Data Entry Spend Specialist	Find Expense Report Lines for Organization	Find an expense report in Workday.	ASU_FMS_WI_Find Expense Report Lines for	
Expenses - Data Entry Spend Specialist	Create Spend Authorization for Worker	Create a Spend Authorization to do a ceah advance or to encumber funds aginst which future expense reports will draw down the balance.	ASU_FMS_WI_Spend Authorization for	
Financial Accounting	Create an Accounting Adjustment	Create Accounting Adjustments for Supplier Invoices and Expense Reports.	ASU_FMS_W_Create_Accounting	
Financial Accounting	Create Accounting Journal	This process allows the user to create an Accounting Journal.	ASU FMS WI Create Accounting Journal off	

3. Search for a specific task using the search feature on the task column.



Departmental Work Instruc	ctions	
Functional Area - Workday Role	Task	Tas
Banking & Settlement - Department Entry (PeopleSoft Role)	↑ Sort Ascending	Us
Basic Navigation - All Users	↓ Sort Descending	Confi
Basic Navigation - All Users	Filter Condition *	Create Value
Basic Navigation - All Users	Value *	Add o busine
Basic Navigation - All Users	search 🗮	Use In
Basic Navigation - All Users	Filter	Ma
Basic Navigation - All Users		Do

4. The Work Instruction names are hyperlinked. To open a Work Instruction, click the appropriate hyperlink.

	Work	1
	ASU_FMS_WI_Department Entry.pdf	
	ASU_FMS_WI_Configure Worklets.pdf	
Reporting	ASU_FMS_WI_Create a Request.pdf	
	ASU_FMS_WI_Favorites.pdf	
	ASU_FMS_WI_Inbox Approval.pdf	
	ASU_FMS_WI_Inbox.pdf	
	ASU_FMS_WI_Mobile_Application.pdf	
	ASU_FMS_WI_Notifications.pdf	
	ASU_FMS_WI_Search Bar.pdf	\
	ASU_FMS_WI_Create Expense Report for Non- Worker.pdf	
	ASU_FMS_WI_Create Expense Report for Worker.pdf	
h behalf of ASU.	ASU_FMS_WI_Create Expense Report.pdf	/
expense report	ASU_FMS_WI_Create External Committee Member.pdf	
	ASU_FMS_WL_Find Expense Report Lines for Organization.pdf	
uture expense	ASU_FMS_WLSpend Authorization for Worker.pdf	
	ASU_FMS_WI_Create_Accounting Adjustments .pdf	
	ASU_FMS_WL	



TIP: you may find it helpful to have two instances of workday open side by side; one showing the work instruction and one showing the work space in which you can complete the transaction.



5. Training Videos are hyperlinked in a separate column on the right of the window.



÷	Training Videos
	HCM (PeopleSoft Position Management, R
ht Entry.pdf	Create an Expense Report for Self
a Request.pdf	Approve an Item
e.pdf	Create and Inventory Stock Request
oval.pdf	Create a Receipt and Return a Purchase to
	View Inventory in Workday
ation.pdf	Run Grants Reports
bdf	Purchasing in Workday
ense Report for Non-	Create an Expense Report for a Worker or
xpense Report for	Departmental Receipting
Expense Report.pdf	Create an Internal Service Delivery
ternal Committee	Non-Stock Gas Requisition

- a. Click the hyperlink for a video you wish to see.
- b. A small window opens with a play button. When you click this play button the video will open in a separate tab.



c. Control the video playback using the controls at the bottom of the page.

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Follow-up Actions

• N/A

Result

• N/A

Next Steps

• N/A