

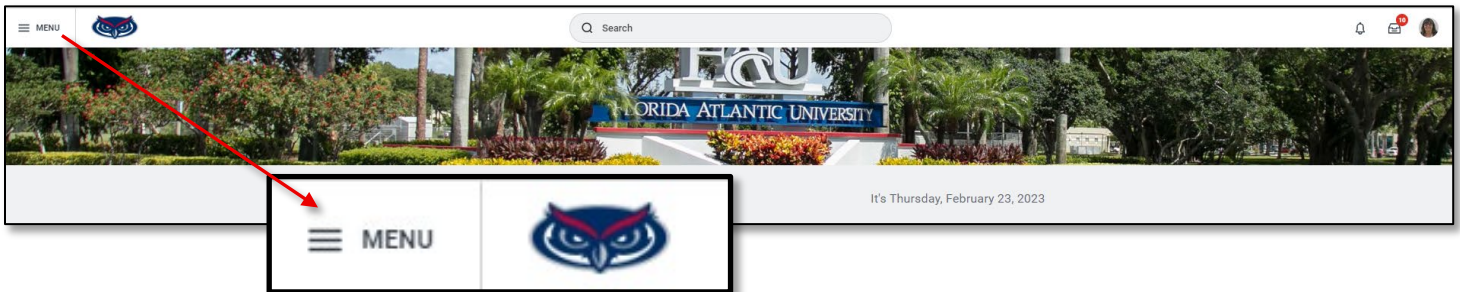
Access: Job Aids - Finance

How to access FAU's library of Workday Job Aids – Finance Section:

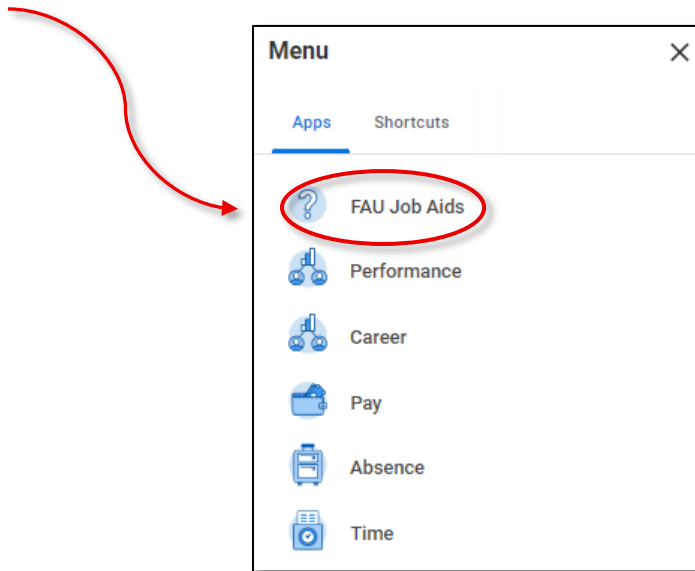
1. Log in to Workday at <https://www.fau.edu/workday/>. Click on the link at the bottom of the page.



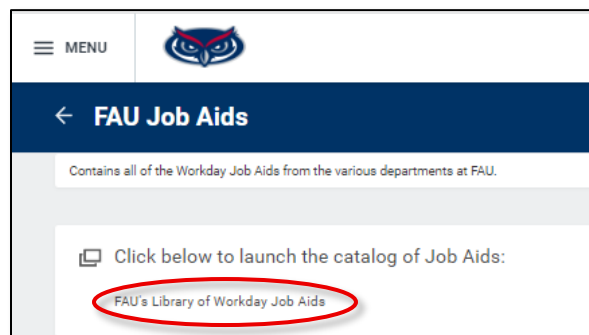
2. After entering your credentials, your home page opens. The **Home Page** is set up based on your personal preferences. You can access the **Job Aids Library** in multiple ways.



3. Click **Menu** to open the Global Navigation Menu.
4. Select **Apps** to open the sub-menu.
5. Click on **FAU Job Aids** from the list.

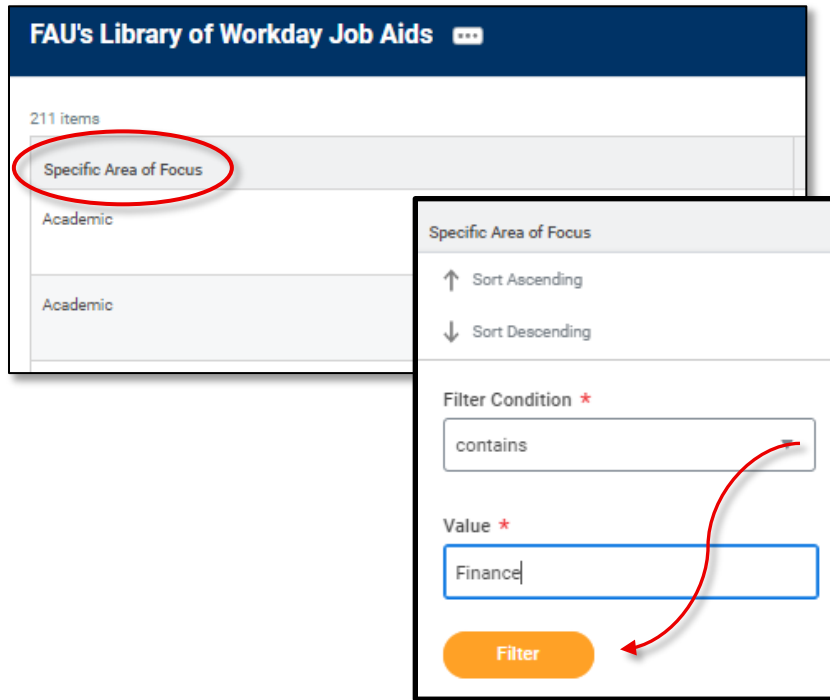


6. The **FAU Job Aids** window opens. Click on the link to launch the catalog.



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7. The **Library** opens with an alphabetical listing by **Specific Areas of Focus**. Click on the column header to open the Filter menu. Type **Finance** in the **Value** field to view only Finance Job Aids. Click **Filter**.

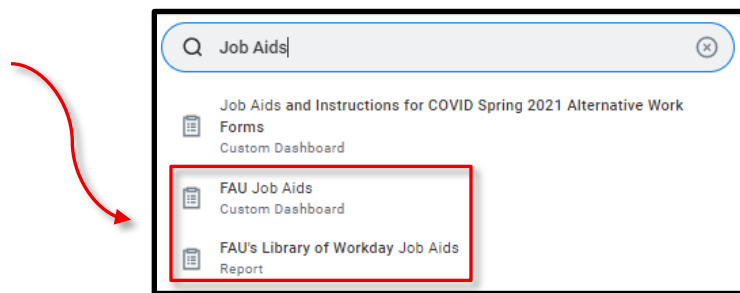


8. Click on any of the links to access the **Job Aid** of choice.

Specific Area of Focus	FAU Workday Job Aid Description	Click here to access the Job Aid (Document)
Finance	How to setup a Finance Worklet	Worklet SetUp Job Aid.pdf
Finance	Maps revenue categories with appropriate ledger accounts for Journal entries.	Ledger Account - Revenue Category Crosswalk.pdf
Finance	How to access Banner Historical Financial Reporting in Workday	Workday Banner Finance Reports.pdf
Finance	This Job Aid describes how to request a new Activity Worktag.	Activity Worktag Job Aid_FHIS.pdf
Finance	How to run commonly used reports (Trial Balance, Data Audit, Find Journals, Find Journal Lines, SmartTag Finder)	Commonly Used Reports.pdf
Finance	How to submit a Help Desk ticket to create a new general ledger, spend, or revenue account	Create New General Ledger, Spend, Revenue Account.pdf
Finance	How to edit an accounting journal	Edit an Accounting Journal.pdf
Finance	How to launch/schedule an EIB (Enterprise Interface Builder)	EIB Launch Procedure.pdf
Finance	How to submit a Help Desk ticket to inactivate a SmartTag	Inactivate SmartTag Request.pdf
Finance	How to submit a Help Desk ticket to request a new detail code	New Detail Code Request.pdf
Finance	How to submit a Help Desk ticket to create a new SmartTag/Cost Center/Fund ID	New SmartTag, Cost Center or Fund ID Request.pdf
Finance	How to create a transfer journal	Create a Transfer Journal.pdf
Finance	How to create an accounting journal using Grant & Non-Grant SmartTags	Create an Accounting Journal.pdf

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9. You can also use the Workday Search field to access **Job Aids**.
- Selecting the **Custom Dashboard** will bring you to the *link* to the **Library**.
 - Selecting the **Report** will bring you directly to the **Report**.



10. There is a section on the **Home Page** that can be customized based on personal usage. You can select **FAU Job Aids** from this section and follow the steps previously outlined in these instructions.

