There are really only four/five tasks that most students will need to know how to do in Workday. Terms in **BOLD** are the exact task names in Workday and are what need entered in the Workday search bar:

1. **CREATE SUPPLIER INVOICE REQUEST** – used when you need a CHECK
2. **CREATE REQUISITION** – ONLY to be used when you want a PO#
3. **CREATE EXPENSE REPORT** –To be used if you need reimbursed for money spent out of pocket. You can only complete an expense report for YOURSELF.
4. **CREATE SUPPLIER REQUEST** – used on the rare occasion when you need to pay a supplier or create a requisition for a person or company that is not already in Workday. You will need a completed, signed, and dated W9 in order to process one of these. Please note that we should always have suppliers set up in Workday prior to doing business with them.
5. **CREATE RECEIPT** – *only used if you created a requisition and you now have an invoice that needs paid from an open PO.*

GENERAL NAVIGATIONAL POINTERS WITHIN WORKDAY

- Always look for comments if something is returned to you and take action accordingly
- Do not rely on the icons – type what you need in the search bar and search for the task you need on the list that populates – and remember, less is more!
- Always use the Action button or look for the related action button in order to edit, copy, or cancel items
- Always check the icon Workday Resources if you need further instruction or information
- Everything is fixable!
- **PLAN AHEAD!!!!**