GETTING STARTED IN WORKDAY@OK – PROJECT FINANCE

THIS GUIDE IS FOR: AGENCY FINANCE STAFF/OMES CENTRAL HR STAFF/SHARED SERVICES

NOTES

Project finance partners can view projects within Workday@OK, which grants access to view key project details including assigned resources (employees) and update the **Project Profile Override** funding.

RELEVANT TERMINOLOGY

TERM	DEFINITION
Resource	An employee assigned to work on a project within Workday@OK.
Resource Plan	The **Resource Plan** outlines all resources (employees) assigned to a project, along with their respective start and end dates.

KEY REPORTS

A list of key reports that may be useful in performing activities is provided below:

REPORT NAME	DESCRIPTION
Project Profile Overrides	A detailed view of all **Project Profile Overrides** added to projects within the agency that the finance partner supports.
Budget Check Exceptions	A report that lists budget exceptions by company, ledger account and plan structure.

VIEW PROJECT

1. On the Workday@OK homepage, navigate to the **Search Bar**.
2. Type and select the report **View Project** from the drop-down menu.
3. Either type or select the appropriate project from the drop-down menu. Select **OK**.
4. The project will open on the **Overview Tab** and the **Resources Tab**. Please consider the below descriptions of each tab.
    - **Overview**: Contains a summary of the project, project details, role assignments and additional details.
    - **Resources**: Contains both the resource plan and all resources assigned to the project.

VIEW PROJECT RESOURCES

1. Beginning on the **Project** page, select the **Resource Tab.**
2. Select **Project Resources**. Resources are listed in a table, including their start date, end date and project allocation.

EDIT PROJECT PROFILE OVERRIDE FUNDING

1. On the Workday@OK homepage, navigate to the **Search Bar**. Type and select the report **View Project** from the drop-down menu.
2. Either type or select the appropriate project from the drop-down menu. Select **OK.**
3. From the **Project Overview** page, select the **Additional Data tab**.
4. Select **Edit**.
5. Within the **Project Profile Override** table, if there is no information, add a new row by selecting the plus (+) icon. If the information exists already, review before making any changes.
6. Enter the correct **Start** and **End Dates** and **Distribution Percent**, which are required fields.
7. Enter the various **Worktag** values based on the project needs. Note: If multiple funding sources are required for the project, ensure the distribution percentage total equals 100%.
8. Select **OK** to save your changes.