

New Employee FMS Training Plan

This document will assist you in determining what Financial Management System (FMS) roles your staff will require and the recommended training.

Training for Employees that will only be entering their own expense reports or creating requisitions		
Role	Description	Take this training
Employee as Self. This is auto-assigned.	This training is recommended for employees that will only be entering their own expense reports or creating requisitions. They will not do additional transactions in FMS.	<p>View the Basic Navigation Videos. There are three videos in this series. The Basic Navigation work instructions are in the same folder.</p> <p>If the user will create their own expense report, view the Create an Expense Report and Spend Authorization Video. Read the step-by-step Create an Expense Report work instruction in this folder.</p> <p>If the user will create purchase requisitions view the Purchasing in Workday Video.</p>

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Following is a list of roles and recommended training for approval and view only roles.

Approve and View Only Roles		
Role	Description	Take this training
Cost Center Manager	Department role used to approve transactions within Workday for programs and gifts	<p>View the Basic Navigation Videos. There are three videos in this series. The Basic Navigation work instructions are in the same folder.</p> <p>View the Approve an Item training video if you will be approving items. Use the Inbox Approval Work Instruction to guide you the first few times you do the task in Workday</p> <p>Attend a Reporting Workshop.</p> <p>To sign up for live Training courses:</p> <ol style="list-style-type: none"> 1. Go to ASU GoSignMeUp 2. Select Financial Training and then select Financial Management System 3. Select the courses you would like to sign up for <p>Read the FMS Reports Workbook and Reference Guide.</p>
Cost Center P-Card Manager	Department role used to approve purchasing card transactions verified by the Department Data Entry Specialist-PCard	
Dean/VP	Department role used to apply Dean/VP level approval to various transactions	
Provost/EVP	Department role used to apply Provost/EVP level approval to various transactions	
Grant Manager	Department role used to approve transactions within Workday for grants	
Department View Only	Department role used to view reports and transactions within Workday. This role is not needed if you have other Workday data entry or approval roles	
Responsible Gift Cost Center Organization	Department role used to view gift and scholarship details such as restriction description and alternate name	
Department Data Entry Specialist – Property Control	Department role used to assign inventory coordinators to capital assets.	

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Following is a list of roles and recommended training for Department Data Entry roles.

Department Data Entry Roles		
<p>All Department Data Entry Roles should take the following courses</p> <p>View the Basic Navigation Videos. There are three videos in this series. The Basic Navigation work instructions are in the same folder.</p> <p>Attend a Reporting Workshop.</p> <p>To sign up for live Training courses:</p> <ol style="list-style-type: none"> 1. Go to ASU GoSignMeUp 2. Select Financial Training and then select Financial Management System 3. Select the courses you would like to sign up for <p>Read the FMS Reports Workbook and Reference Guide.</p>		
Role	Description	Take this Training
Department Accountant	Department role used to enter journal entries, accounting adjustments and budget amendments	<p>Create Journals and Amend Budgets is a live monthly course for users who have the Department Accountant Role.</p> <p>To sign up for live Training courses:</p> <ol style="list-style-type: none"> 1. Go to ASU GoSignMeUp 2. Select Financial Training and then select Financial Management System 3. Select the courses you would like to sign up for

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		Read the work instructions for Create Journals and Amend Budgets .
Department Data Entry Specialist – Internal Service Provider	Department role used to enter internal service delivery documents (ISD)	View the Create an Internal Service Delivery Video and view the Work Instruction .in this folder.
Department Data Entry Specialist – PCard	Department role used to verify PCard transactions within Workday	View the PCard Verification Work Instruction in this folder for step-by-step instructions on how to verify PCard transactions.
Department Data Entry Specialist - Spend	Department role used to enter change orders, receivers, non- purchase order invoices, expense reports and spend authorizations on behalf of others for programs, projects, gifts and grants	<p>Department Data Entry Specialist-Spend is a live monthly course for users who have the Department Accountant Role.</p> <p>To sign up for live Training courses:</p> <ol style="list-style-type: none"> 1. Go to ASU GoSignMeUp 2. Select Financial Training and then select Financial Management System 3. Select the courses you would like to sign up for <p>Use the Department Data Entry Specialist-Spend Work Instructions to guide you the first few times you do the tasks in Workday. Sort the functional area column on the word Suppliers.</p>
Department Data Entry Specialist – Supplier Contracts	Department role used to enter supplier contracts for purchases that do not require a purchase order. Only used for Facilities Management and Real Estate departments.	Read the step-by-step Supplier Contracts Work Instructions .

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Following is a list of roles and recommended training for other roles.

Other Roles		
Role	Description	Take this Training
PeopleSoft HR Cost Center Manager	Department role used to approve personnel transaction requests (PTR) and select position management transactions for projects, programs and gifts within the PeopleSoft HR system. This role does not conduct transactions in the FMS	View the PeopleSoft Position Management Video and PTR Changes video and take the quiz.
PeopleSoft HR Grant Manager	Department role used to approve personnel transaction requests (PTR) and select position management transactions for grants within the PeopleSoft HR system	
Cost Center P-Card Allocator	Department role used to review and reallocate purchasing card transactions within Payment Net for programs, gifts and projects.	Take PCard Online training and take the quiz. Read the Allocator Quick Guide document.

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Grant P-Card Allocator	Department role used to review and reallocate purchasing card transactions within Payment Net for grants	Read the Allocator Quick Guide for Authorizations/Declines . Read the PaymentNet Reports guide.
Jaggaer Procurement Requestor	Department role used to request and review contracts and participate in sourcing activities such as RFPs in Sunrise	View the Purchasing in Workday video. Read the Print a PO Work Instruction , in this folder, which is associated with this role.

Following are instructions on how to request a role.

Request a Role	
If your user will do more than their own expense report and Follow the instructions in these materials to request a role. Either the user can request their own role, or the manager can request a role on behalf of the user.	<div>  View the Role Request Using ASU Service Catalog training video. </div> <div>  Read the Work Instructions for requesting roles. These are helpful the first few times you do the task. </div>

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Work Instructions Worklet

Work Instructions and videos are also accessible from the FMS Homepage in the Work Instructions Worklet.

From your FMS homepage click on the Work Instructions Worklet



Work Instructions

Once you have opened the Worklet, click on any of the column headings (Functional Area, Task or Task Description) and use the Filter to locate the topic.

If you have questions please send an email to FMS@asu.edu.