Contents

Activity Worktag Request

The Activity worktag is an additional worktag which may be used on transactions to capture data for reporting, specific control or reconciliation purposes. The Activity worktag may be used on all types of transactions, for example: supplier invoices, purchase orders, cash sales and journal entries. Using the Activity worktag, when included with Additional worktags, provides the ability to track revenues and/or expenses for a particular activity.

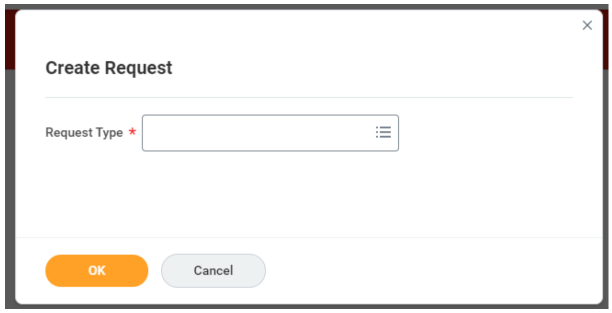
This guide provides steps for an **Activity Worktag Request** to be completed directly in Workday.

The Security Groups allowed to initiate this Activity Worktag Request process are Cost Center Finance Specialist, Cost Center Manager and Division Manager. Central users have access to initiate all Workday worktag Requests.

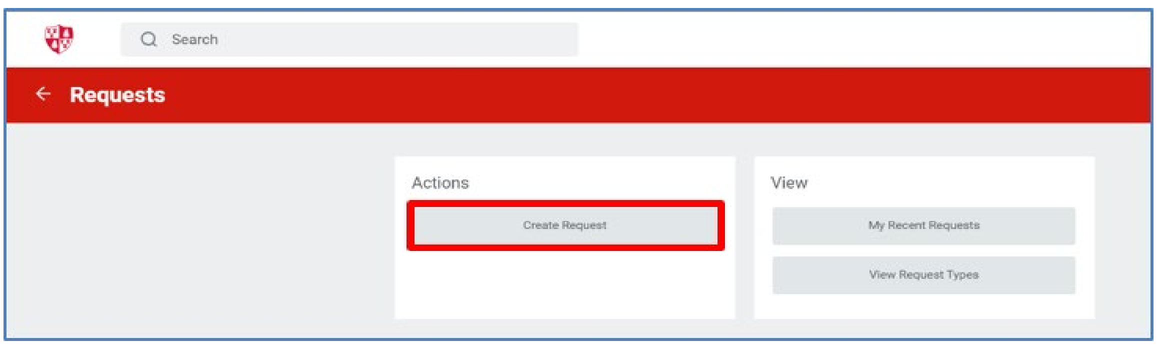
If access to Workday is required please use the ***Security Role Request Form***

Create Request

1) In the *Search* field, enter **Create Request**.

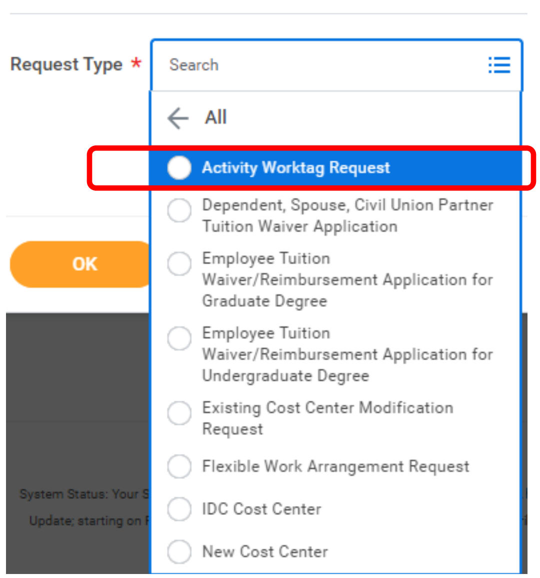


OR if you have the worklet on your dashboard, click on the **Requests** worklet, then click **Create Request**

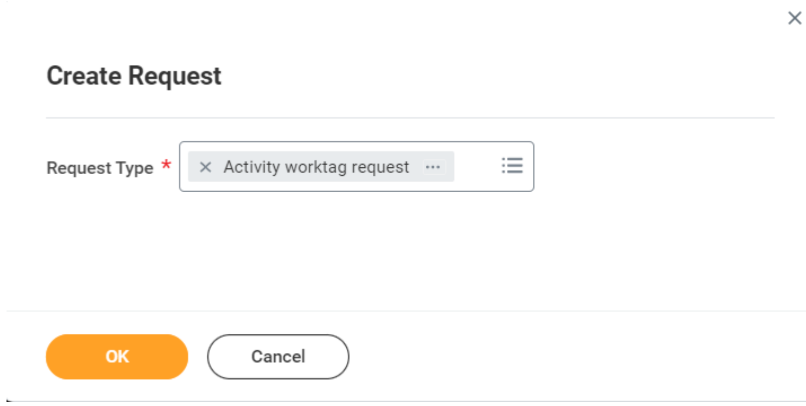


Note: To add the worklet to your desktop see page 12 of this Job-Aid.

2) Click **All** in the Request type field and select the radio button next to **Activity Worktag Request** option.



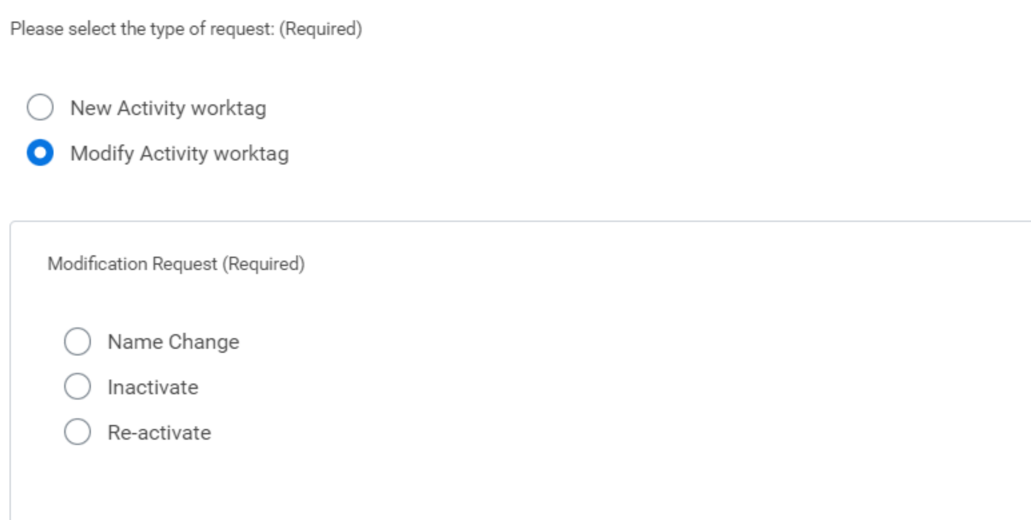
3) Click OK



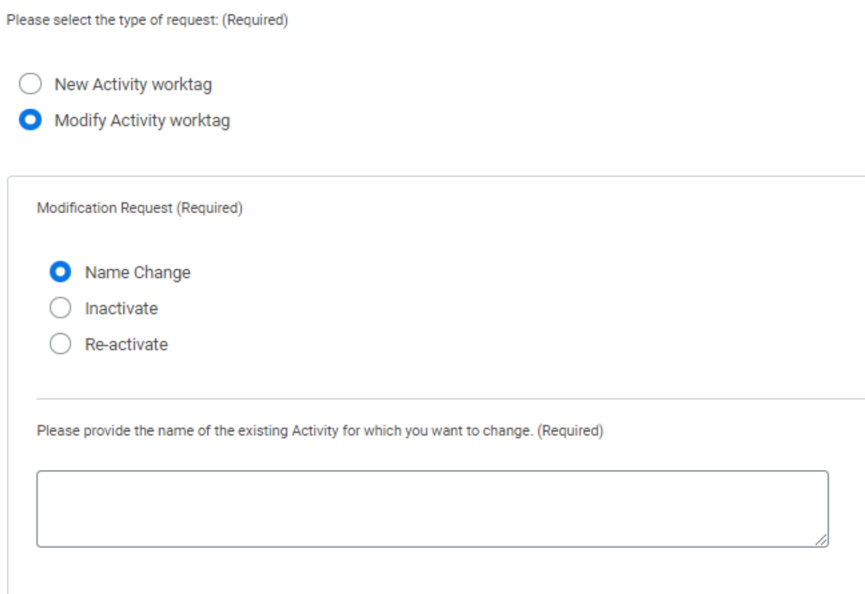
4) **Complete the questionnaire.** All questions should be answered, if the question is not applicable please enter ‘N/A’.

- **Specify if this is request is for a new Activity worktag or a modification of existing Activity workatg:**

  - If modifying an existing Activity worktag, indicate the requested modification type:

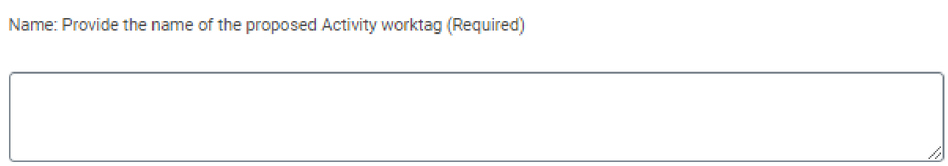


- **If selecting Name Change:**
    - **Provide the Name of the <u>existing</u> Activity worktag:**

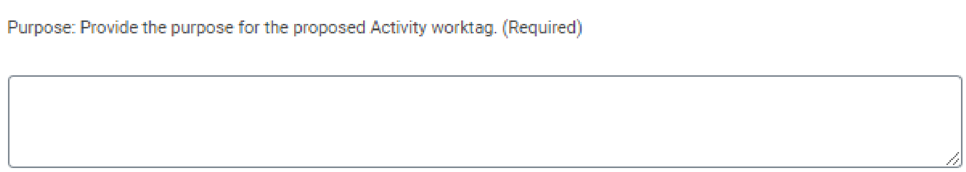


- **Provide the information for the Activity worktag being requested:**

- Provide the Name of the proposed Activity worktag:



- Provide the Purpose for the proposed Activity worktag:



- Indicate if this Activity worktag is to be associated with any specific Cost Center or Division:

Is this proposed Activity worktag to be associated with a particular Cost Center or Division (Required)

Yes

No

  - Indicate any specific Cost Center or Division to be associated with this proposed Activity worktag:

Is this proposed Activity worktag to be associated with a particular Cost Center or Division (Required)

Yes

No

Provide the associated Cost Center or Division name and ID (Required)

- Provide the date for which this Activity worktag should be required:

Provide the date for which the proposed or existing Activity worktag should be activated or modified. (Required)

MM/DD/YYYY

- If there are multiple Activity worktags to be created upload a document with the details to this section of the questionnaire: -

For multiple Activity worktag requests upload a document with the details.

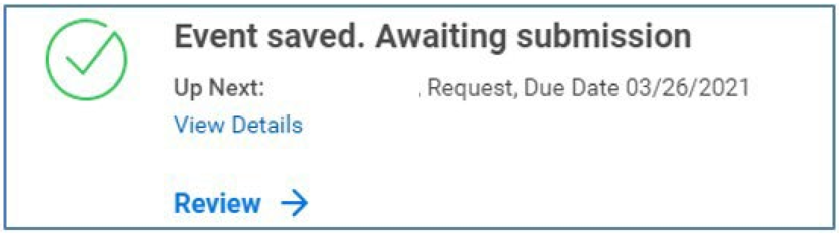
Drop files here

or

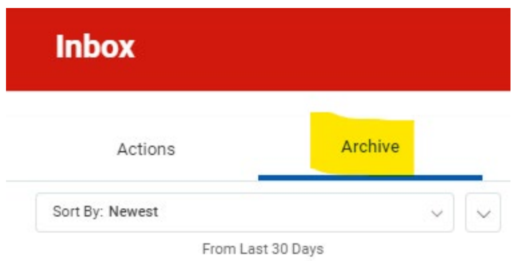
Select files

5) Click **Submit** to route the request for approval. There will be an error message if there are any unanswered questions. If so, enter 'N/A' into the text box and the click the Submit button again.

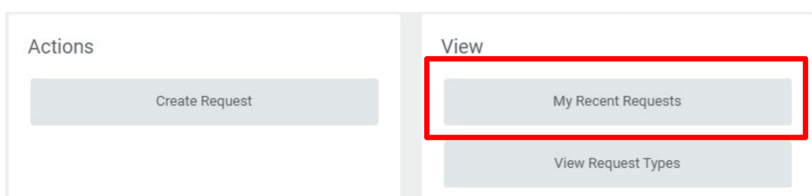
6) If **Save for Later** is selected, the request will be located in the Inbox where it may be selected and completed at a future date.



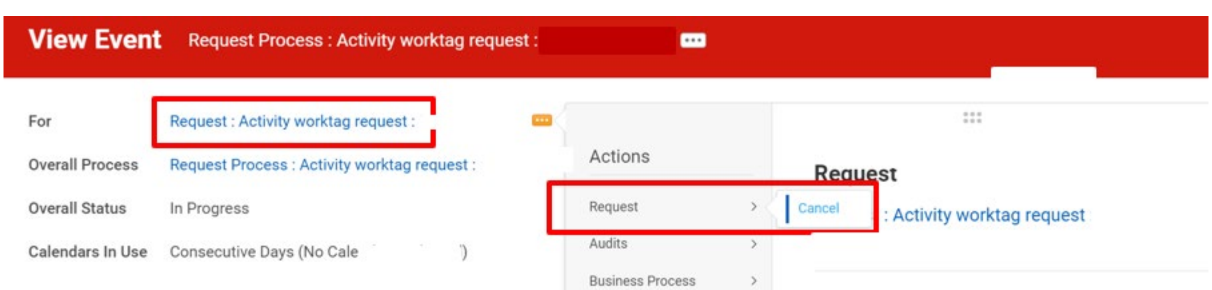
7) If there is a need to **Cancel** the Request. Find the request either in your Inbox (Archive)…



…Or in the worklet Requests.

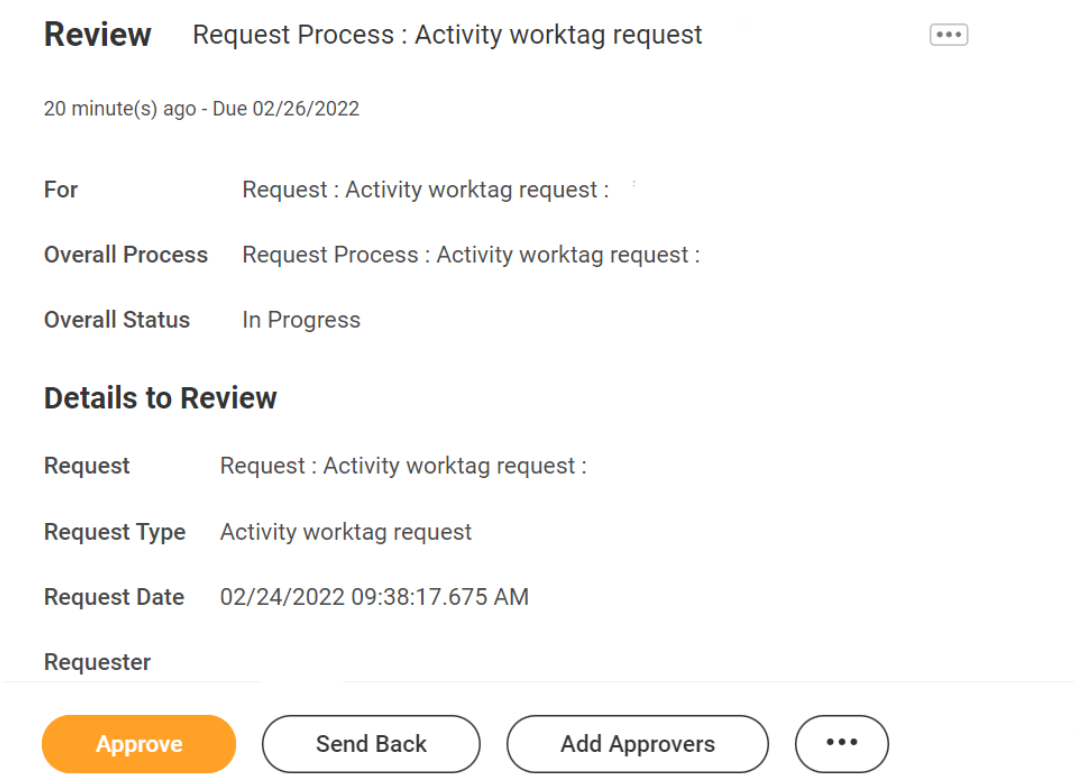


From the related actions of the Request select Cancel.

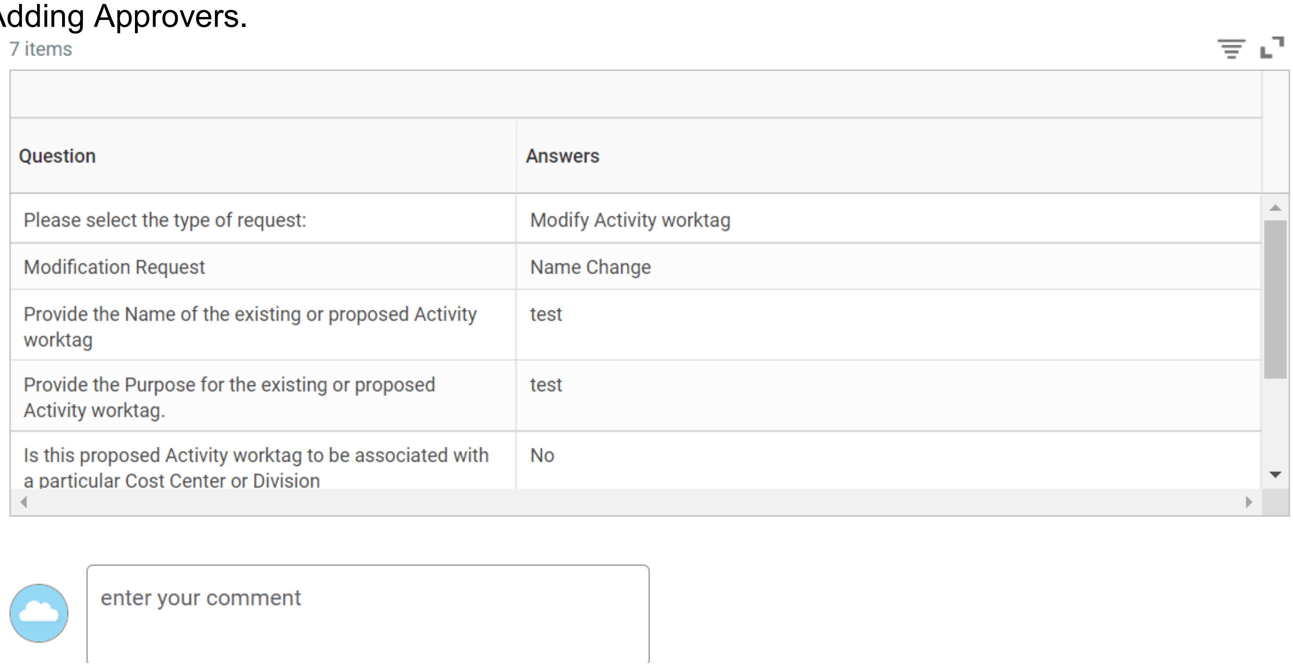


Approval Workflow

1) The Activity worktag Request will be sent to the Approver's Inbox.

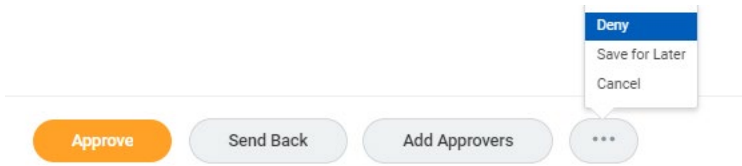


2) Review the questions and answers of the questionnaire and enter any comments into the Comment box before either Approving, sending back or Adding Approvers.

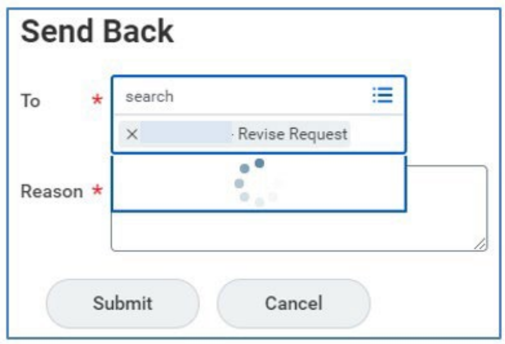


Question	Answers
Please select the type of request:	Modify Activity worktag
Modification Request	Name Change
Provide the Name of the existing or proposed Activity worktag	test
Provide the Purpose for the existing or proposed Activity worktag.	test
Is this proposed Activity worktag to be associated with a particular Cost Center or Division	No

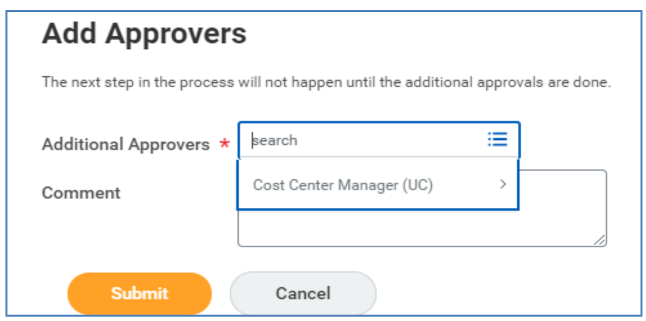
3) Once the questionnaire is reviewed either:
- **Approve** to advance the questionnaire to the next step of the process,



- **Send Back** to the Initiator/Approver to revise the questionnaire,

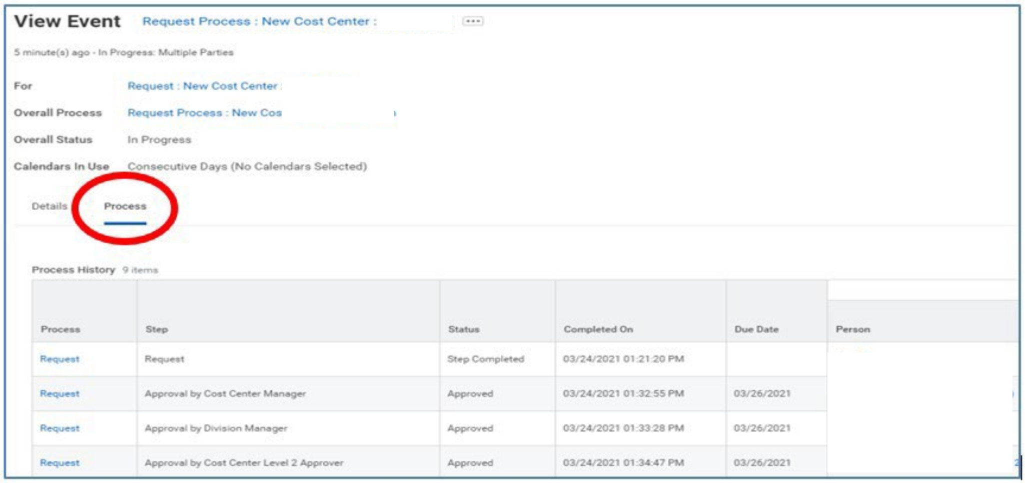


Add Approvers to show your approval but will not progress to the next step until this additional approval is submitted.



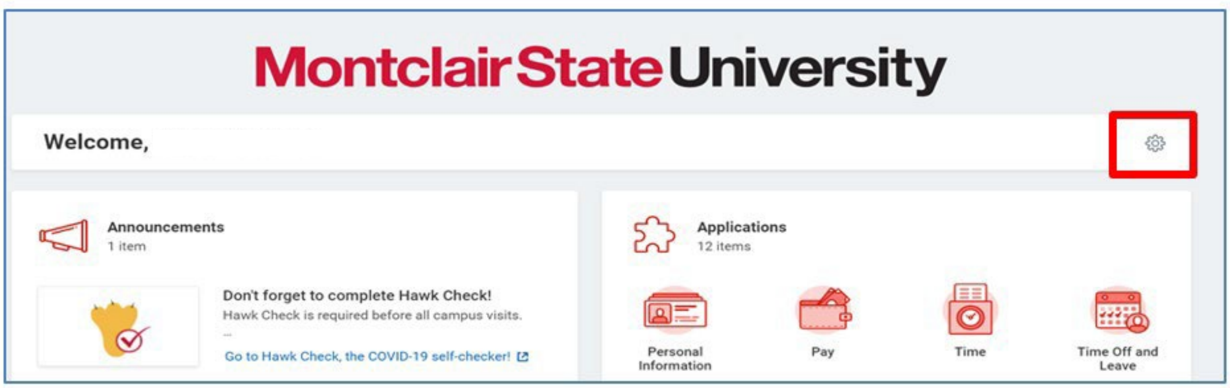
4) In order to follow up on the status of the request:
   - as Initiator – Click the **Request** worklet on the Home page and view *My Recent Requests.*

- as Approver – From with the Archive tab of the Inbox, click the **Process** tab of the **View Event option** on the Request.

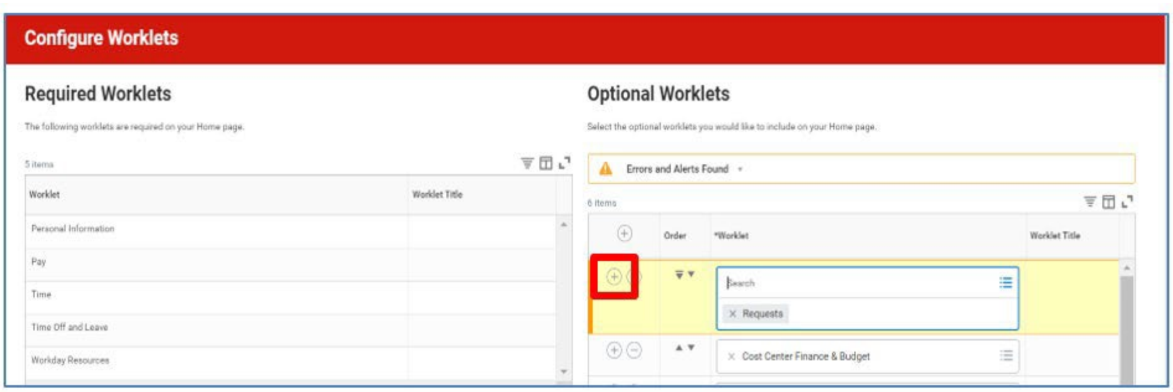


Add Requests Worklet to the Home Dashboard

1) Click the **gear icon** on the Workday Home page.



2) Click the **Plus sign** and select **Requests** from the prompt.



3) Click **OK** and **Done**.

The Requests worklet displays on your Home Page.