

Request a Plant Reserve Driver Worktag in Workday

Purpose

Use this job aid when requesting a **new Plant Reserve USource Driver Worktag** in Workday.

Plant Reserve selections to use

Field / Prompt	Selection for Plant Reserve request
Request Type	USource: Create New, Modify or Inactivate Driver Worktag
Type of Request	New USource Worktag
Fund	Plant Funds
Plant Fund Hierarchy	Self Support: FD48200 Plant Reserve (SelfSupp) OR State Support: FD48400 Plant Reserves (St/NonBud)
Higher Ed Function Code	30 - Plant
Plant Hierarchy Code	HE3015 Plant Funds – Other
Account Type	64 - Renewal and Replacement
Estimated Annual Budget	Not required for Plant Reserve requests

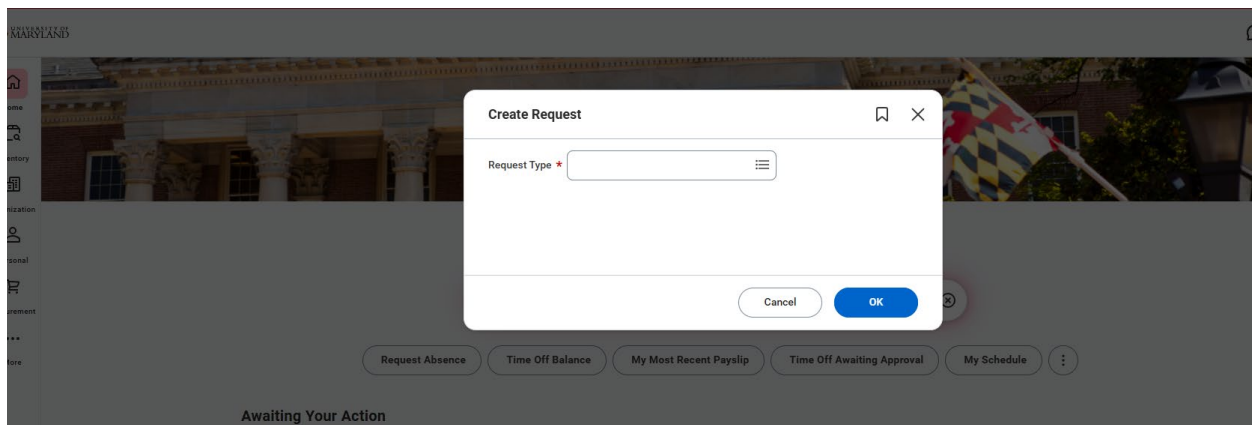
Before you start

- Have the business reason/purpose for the new Plant Reserve account ready.
- Confirm the applicable campus and cost center.
- Know whether the Plant Reserve is Self Support or State Support.
- Have approval/supporting documentation from the USource Manager ready to upload.

Steps

1. Open the Create Request task

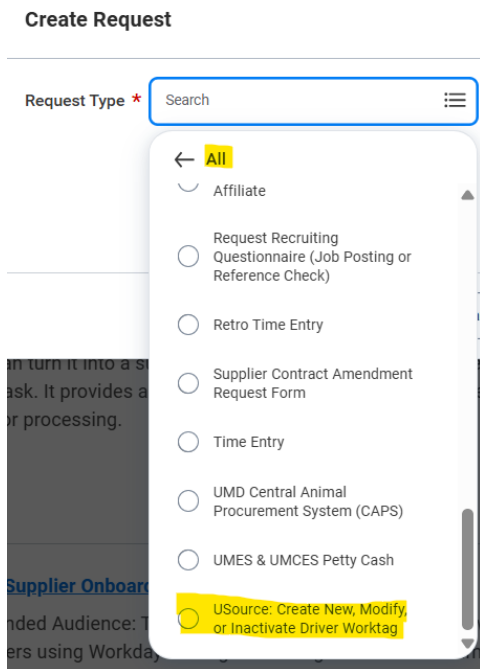
In Workday, type **Create Request** in the search bar and open the task.



Search for and open Create Request.

2. Select the USource request type

In **Request Type**, select **All** and then choose **USource: Create New, Modify or Inactivate Driver Worktag**. This option appears near the end of the list.



The screenshot shows the 'Create Request' form. The 'Request Type' field is highlighted with a blue border. A dropdown menu is open, showing a list of request types. The 'All' option is selected at the top. The 'USource: Create New, Modify, or Inactivate Driver Worktag' option is highlighted at the bottom of the list.

Choose the USource: Create New, Modify, or Inactivate Driver Worktag request type.

3. Complete the request information

Complete the required fields. The screenshots highlight the Plant Reserve-specific selections; all other required prompts must also be completed.

- **Applicable Campus:** select the correct campus for the request.
- **Type of Request:** select **New USource Worktag**.

Please Provide a Detailed Description of the Purpose and Reason for Creating a New USource Worktag, Modifying an Existing One, or Inactivating a Current Worktag.
(Required)



A text input field for providing a detailed description of the purpose and reason for creating a new USource Worktag, modifying an existing one, or inactivating a current worktag.

Select the Applicable Campus for This Request.
(Required)

- ☒ UM01 University of Maryland College Park (UMCP)
- ☐ UM04 University of Maryland Eastern Shore (UMES)
- ☐ UM07 University of Maryland Center for Environmental Science (UMCES)
- ☐ UM08 University System of Maryland (USMO)
- ☐ UM09 University of Maryland Shady Grove (UMSG)

Choose the Type of Request.
(Required)

- ☒ New USource Worktag
- ☐ Modify a USource Worktag
- ☐ Inactivate a USource Worktag

Select the campus and New USource Worktag.

4. Add the worktag details and supporting documentation

Enter the requested Driver Worktag name, including the USource code if available. Enter the USource Manager name and UID when requested. Upload the required supporting documentation showing the USource Manager approval.

Important: The request cannot be completed without the required supporting documentation.

The screenshot shows a web form with three main sections. The first section is titled 'Name of the Driver Worktag (If Modifying/Inactivating, Also Include USource Code). (Required)' and contains a text input field. The second section is titled 'Provide the Name and UID of the USource Manager for the New Driver (If Only Changing USource Manager, Do Not Use This Form. Place a Request With Security Team).' and contains a text input field. The third section is titled 'Please Attach Supporting Documentation from the USource Manager Approving this Request. (Required)' and contains a large rectangular area with a dashed border. Inside this area, there is a 'Drop files here' label, a small 'or' button, and a 'Select files' button.

Upload the supporting documentation from the USource Manager.

5. Select Plant Funds and the correct Plant Fund Hierarchy

For the fund, select **Plant Funds**. After Plant Funds is selected, the Plant Fund Hierarchy prompt appears.

Choose the hierarchy that matches the funding source:

- **Self Support:** FD48200 Plant Reserve (SelfSupp)
- **State Support:** FD48400 Plant Reserves (St/NonBud)

Complete the cost center field and any other required prompts.

The screenshot shows a web form with two main sections. The first section is titled 'Indicate the Fund for this USource. First Select the Fund Hierarchy and Choose the Appropriate Subsequent Code.' and contains four radio button options: 'Current Funds Unrestricted', 'Loan, Gifts & Endowment Funds', 'Plant Funds' (which is selected), and 'Agency Funds'. The second section is titled 'Select the appropriate code under the Plant Fund Hierarchy' and contains a dropdown menu with 'select one' and a downward arrow. Below this, there is a section titled 'What is the Cost Center Associated With the USource Worktag? (Required)' and a text input field.

Select Plant Funds, then choose the appropriate Plant Fund Hierarchy.

6. Select the Higher Ed Function Code and Account Type

- For the Higher Ed Function Code, select **30 - Plant**.
- For Plant Hierarchy Code, select **HE3015 Plant Funds – Other**.
- For Account Type, select **64 - Renewal and Replacement**.

What is the Higher Ed Function Code for this USource Worktag?

30 - Plant ▼

HEFC - 30 - Plant Hierarchy Codes

☐ HE3001 Plant Funds - STARS

☒ HE3015 Plant Funds - Other

☐ HE3016 Plant Funds - Operating Equipment

☐ HE3017 Plant Funds - Non-Capital

☐ HE3018 Plant Funds - Capital

☐ HE3019 Plant Funds - Completed Projects

Select the Appropriate Account Type for the Driver Worktag.

☐ Account Types 00-59

☒ Account Types 60-99

Select the appropriate account type

64 - Renewal and Replacement ▼

Use 30 - Plant and 64 - Renewal and Replacement.

7. Review and submit

- Do not enter an estimated annual budget for Plant Reserve requests.
- Review the request to ensure every required prompt is complete.
- Select Submit.