



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Create Project Plan

■ Table of Contents

1. [Prerequisites](#)
2. [Create Project Plan](#)
3. [Assign Resources to the Project Plan](#)
4. [Common Errors & Resolutions](#)
5. [Best Practices](#)

■ Purpose

This guide provides step-by-step instructions for a Project Manager to create a Project Plan in Workday. Project Plans help to capture the details of a project from start to finish, by:

- Listing the phases and tasks that define the project work
- Designating milestones for a project
- Marking specific tasks as nonbillable to exclude the association work hour from billing and revenue forecasts
- Marking specific tasks for reports on actual utilization

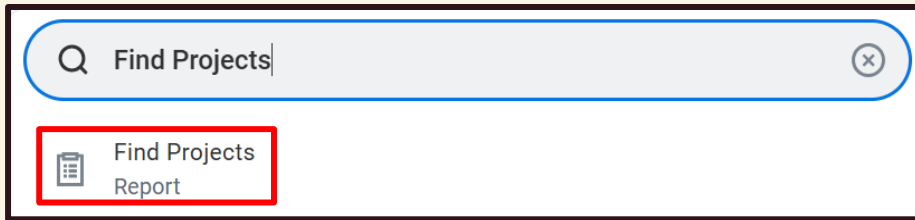
■ Prerequisites

Before creating a Project Plan, ensure the following:

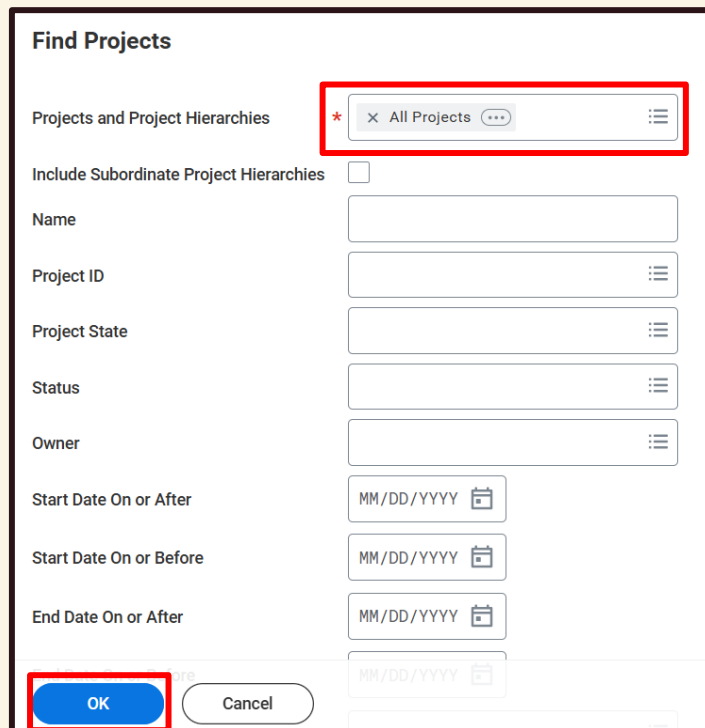
- You have the appropriate Workday security role (e.g., Project Manager, Project Administrator)
- Create a Project Hierarchy
- Create a Project
- Set up Project Plans

■ Create Project Plan

- Type *Find Projects* into the search bar and select the report.



- Select the relevant project or project hierarchy that you are creating a resource plan for. Click *OK*.





- Find the relevant project listed in the report and navigate to the project detail window by clicking on the project name.

36 Items

Project	Owner	Start Date	End Date	Project Status
2025 Manufacturing Optimization	Teresa Serrano	01/01/2025	12/31/2025	In Process
Billable Test 1	Teresa Serrano	01/01/2025	12/31/2025	Approved
Bluestar Projects	Teresa Serrano	06/16/2025		Completed
Daily Rate Sheet	Teresa Serrano	05/27/2025		
DNU	Teresa Serrano	01/01/2025		

- Navigate to the *Project Plan* tab then *Project Planner* and click on the “+ Add”.

2025 Manufacturing Optimization

Owner [Teresa Serrano](#)

Percent Complete 50%

Status [In Process](#)

[Project Plan](#)
[Resources](#)
[Financials](#)
[Overview](#)

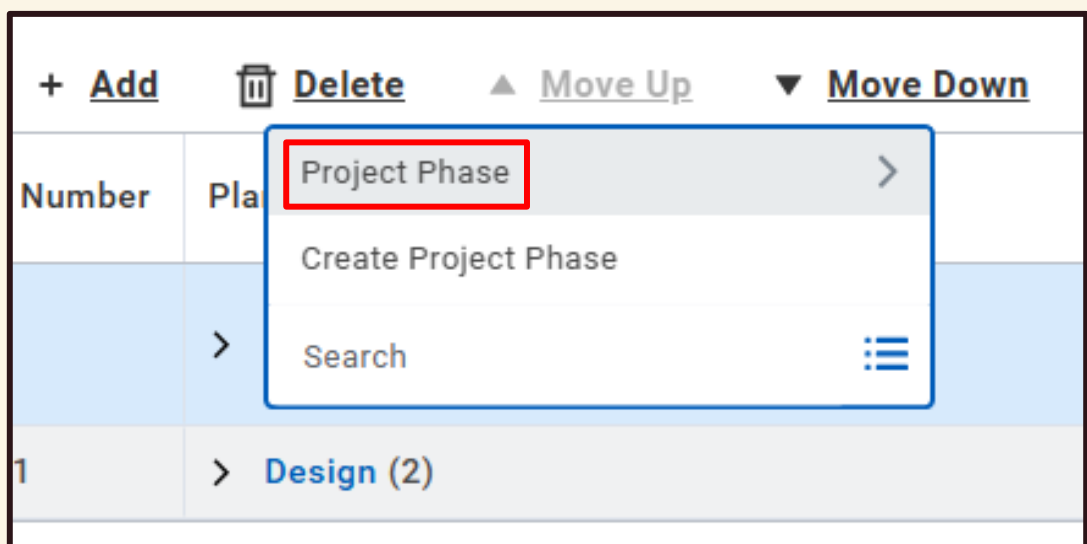
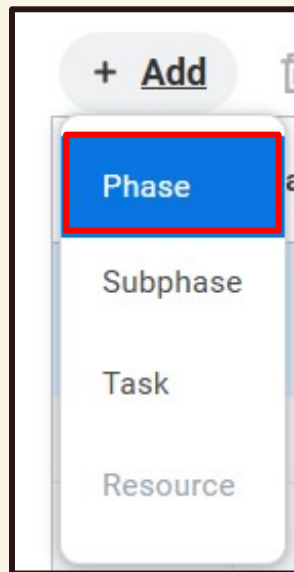
[Project Planner](#)
[Task Resources](#)
[Risks](#)

[Mass Update](#)
[Timeline](#)

[+ Add](#)
[Delete](#)
[Move Up](#)
[Move Down](#)

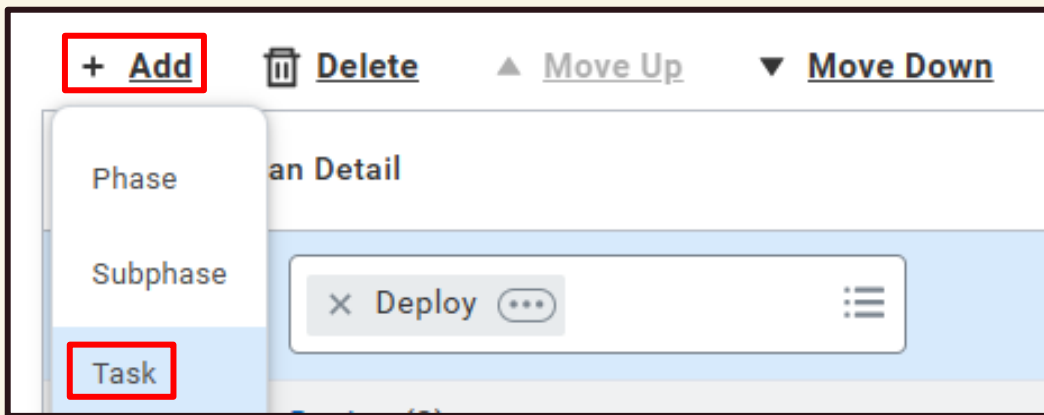


- Populate the *Phase* field by selecting *Project Phase* from the list of existing Project Phases.





- Once you have added a phase you can then add a project task to that phase. Click on the phase you just created then click “+ Add”. For each task, enter a *Start* and *End Date*. These dates control when a worker can add time to that task.

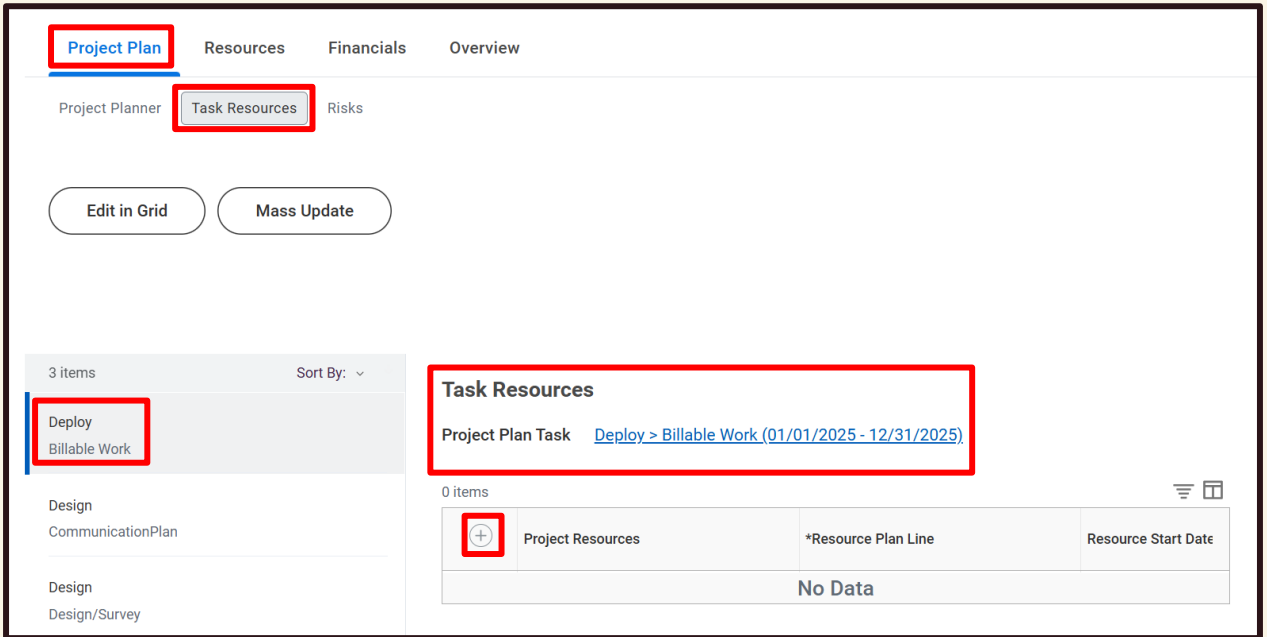


+ Add Delete Move Up Move Down Expand All Phases Collapse All									
Number	Plan Detail	Custom Task...	Start Date	End Date	Estimated ...	% Complete	Milestone	Closed	Utilization
1	Deploy (1)								
T	> × Billable Work ... : ≡		01/01/2025	12/31/2025		0	☐	☐	☐

- *Optional:* enter the % Complete and Non-Billable checkboxes for each task. Checking the *Milestone* box will enable the task to be selected as a milestone on billing and revenue recognition schedules.
- Click OK

■ Assign Resources to the Project Plan

- To assign resources to the *Project Plan Task* you created, navigate to the *Project Plan* tab. Select the *Task Resources* sub tab and select the relevant Project Plan Task.
- Click the + icon to assign a *Project Resource* to the *Project Plan Task*



The screenshot shows the Workday Project Plan interface. The 'Project Plan' tab is selected at the top. Below it, the 'Task Resources' sub-tab is highlighted. The main area displays a list of tasks under the heading 'Task Resources'. The first task is 'Project Plan Task' with a link to 'Deploy > Billable Work (01/01/2025 - 12/31/2025)'. Below this, there is a table with columns for 'Project Resources', '*Resource Plan Line', and 'Resource Start Date'. The table currently shows 'No Data'.

Project Resources	*Resource Plan Line	Resource Start Date
No Data		



- Assign an employee from the *Resource Plan* to the *Project Plan Task*. Provide inputs for the *Project Resource*, *Resource Plan Line*, *Resource Start and End Date*, *Allocation %*, and *Estimated Hours*.

Task Resources

Project Plan Task Deploy > Billable Work (01/01/2025 - 12/31/2025)

1 item

Project Resources	*Resource Plan Line	Resource Start Date	Resource End Date	% Allocation	Estimated Hours	Memo
✕ Consultant-2	✕ Consultant	01/01/2025				

 12/31/2025 |

■ Common Errors and Resolutions

Issue	Description	Resolution
Lack of Clarity in Project Phases	Unclear definitions of project phases can lead to confusion among team members.	Clearly define and document each project phase and its associated tasks.
Inconsistent Task Assignments	Workers may not be assigned to the correct tasks, affecting project timelines.	Regularly review and update worker assignments to ensure alignment with project goals.
Misclassifying Billable and Non-Billable Tasks	Non-billable tasks may inadvertently be included in billing forecasts.	Mark specific tasks as non-billable to exclude them from billing and revenue forecasts.

■ Best Practices

- Create templates for your standard project plans and your task resources to reduce the time users spend on data entry. Workday populates the fields on the project plan with information from its associated template.
- Restrict project plan tasks to the relevant project hierarchies for simplified task selection.
- Structure your project plans using phases to sequence the work effectively. Ensure that project phases are a required component of your plans.
- Specify the date ranges for when workers can log their hours on the project to maintain control over time tracking.



Thank You

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