Project One Working Glossary of Workday Terms

Updated as of July 1, 2019

This is a working document that is subject to updates and edits at any time.

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General Workday / Terms and Concepts

Approval Chain
The hierarchy of roles to approve a business process; defines the approval workflow.

Approver
Designated participant(s) in a business process, with a defined responsibility, indicates they approve the proposed action so the business process can proceed.

Business Intelligence
A set of methodologies, processes, architectures, and technologies that transform raw data into meaningful and useful information used to enable more effective strategic, tactical, and operational insights and decision-making.

Business Object
Workday stores data, such as organizations, workers, etc., as business objects.

Business Process
A sequence of one or more tasks that accomplishes a desired business objective (i.e. hiring an employee, paying an invoice); they are tasks that you can initiate, act upon, and complete in order to accomplish a desired business objective. Business processes are comprised of Actions, Approvals, Approval Chains, To Dos, and/or Checklists.
- An Action can be a single task or sub process, which is also a combination of Actions, To Dos, and/or Checklists.
- Within the process, conditions can be defined which will identify whether a step will be initiated.
- Notifications can be created to let a Workday user know that a step has begun, completed, or that a particular review response was selected.

Cloud-based
Applications based in the computing cloud.

Company
Usually denotes an institution with its own Federal Employer Identification Number (FEIN).

Condition Rule
A condition that defines the routing of workflow within a business process.

Consolidated Approval
A type of approval that is generated when one role has multiple successful approval actions in a business process; an approver is able to approve multiple steps in a business process at once.

Contact
The information needed to get in touch with a person such as phone number and address.

Delegate
A person who completes a task on another person's behalf.

Delegation (Business Process)
The ability of an employee to assign steps of a business process to another person to complete on their behalf. For example, managers may delegate certain tasks to their administrative assistants.
- Delegation may be temporary and not all steps may be delegated.
- Requesting a delegation change is a business process that may require approvals and may or may not be included in UA System configuration.

Employee Self Service (ESS)
Functionality within Workday that allows employees to access and manage their personal HR, benefits and payroll records.

ERP (Enterprise Resource Planning)
A business management software that enables an organization to integrate back-office HR, finance and technology services. Workday is an ERP.

Event
A transaction that occurs with your organization, such as hiring an employee; an event in Workday that is the catalyst to initiating or triggering key business processes.

Initiate
The first step or transaction in a business process.

Initiator (Requestor)
A person enabled in Workday to create or start a particular business process.

Manager
Someone with at least one employee reporting directly to them. The manager has the ability to view relevant job data on direct and indirect reports. This is a Workday role assignment rather than a job title.

Manager Self Service (MSS)
Manager's ability to initiate and perform management related tasks in Workday such as approving time. It consists of processes that employees assigned the security role would typically perform as a manager.

Modify (security permission)
The permission to view and gain direct access to securable items through the Workday user interface. It includes view permission.

Organization
An organization refers to a grouping used to organize people, resources, workers, and other organizations.

Organizations are the basic building blocks of Workday. They can be organized into hierarchies (Supervisory Organizations), Project Teams (Custom Organizations), etc. to enable reporting at different levels and roles; security can be assigned to any level of the hierarchy. Organizations provide management, visibility into, and reporting (roll-up) structures for employee allocation.

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Reason Codes
Pre-defined codes in Workday that allow a user to indicate the purpose for their business process.

Requester (Initiator)
The person who requests or performs the first step in a business process.

Security Roles
Designations that determine access to perform the Initiate, View and Modify, Cancel or Rescind, and Approve business processes.

Supervisory Organization
Elements of the organizational chart that groups employees into a management hierarchy to define who reports to whom. Foundational, hierarchical position-to-position structure. Can be a business unit, department, group, or project.

- Departments can have multiple supervisory organizations (one per unique manager). All employees must belong to a supervisory organization and each supervisory organization must have a manager.
- The manager cannot belong to the same supervisory organization that they manage and instead typically belong to the Supervisory Organization directly superior to the one they manage.

Tenant
Workday's term for a database instance or environment, such as development, testing or production etc.

To-Dos
Reminders to do something outside of the Workday system. They are related to a business process and have to be marked complete before the workflow will go to the next step.

Validation Rules
Rules that prevent the entry of data or that trigger an error or warning message upon submission of a business process.

Examples:
- A validation rule can prevent the entry of unpaid time off or requests of less than 4 hours.
- A validation rule for a leave of absence can ensure that an employee does not exceed the maximum number of leave days allowed each year.

Worker
Workday term that refers to an employee or a contingent worker.

Workflow
Workflow defines who can perform each task and provides a routing mechanism to flow the task execution from one user to another.

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Workday Navigation

Actions and View
Buttons to commonly grouped tasks and reports. Accessed through Worklets.

Cancel (business process)
Canceling a business process stops the workflow in progress and reverses any changes made to Workday data. It is also a securable action in a business process security policy.

Dashboards/Landing Pages
Dashboards consist of a number of pre-configured worklets that are specific to a functional area, like Talent Management or Workforce Planning. Since these worklets are built with the report writer and report-specific calculated fields, only specified users with appropriate security access can copy and modify them.

Drill Down
Matrix reports in Workday enable you to drill down to see underlying data. When you click on a drillable element (such as a drillable field in the table view or a column, line, or pie segment in the chart view), a context menu appears that enables you to select a new View By field. If the Enable Drilldown to Detail Data check box is selected on the Advanced tab of the report definition, you can also select Details associated with the selected report element.

Drive
Location of documents in Workday.

Inbox
Workday location for the employee to check daily for action items and tasks to be completed on a timely basis.

Notification
Usually received through the Workday Inbox and can be configured to send to employee email.

Related Actions (three dots)
A clickable icon that enables the user to perform additional actions for an object. Possible actions include viewing your current benefit elections, editing your contact information, and requesting time off.

Task
A business process step that you must complete.

Worklet
A compact app displayed as an icon or tile on an employee's Workday Home page. Worklets provide easy access to tasks and information used on a regular basis (e.g. "Pay", "Personal Information", "Benefits", and "Time Off"). Worklets are configurable and moveable by the end user.

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Academic

Academic Affiliate
Individuals who work at an educational institution but aren't in an employment relationship with the institution. They're usually visiting professors, scholars, clinical faculty, or other administrative personnel. In Workday, academic affiliates only exist in the context of academic appointments. Academic affiliates hold academic appointments but aren't paid and don't have positions or supervisory organization assignments.

Academic Appointment
An academic appointment tracks an academic **appointee's** time at a university or college. Appointments record an appointee's relationship to an Academic Unit, over a period of time on a particular academic track.

Academic Pay
An academic appointee's distinctive pay structure is based on the individual's position, funding, FTE, and annual work period/disbursement plan period (for example, part time vs. full time, and 9-month vs. 12-month).

Academic Staffing
This generally refers to the HCM staffing model unique to faculty or scholarly workers. In Workday, Academic Staffing is made up of the "Academic Appointments," "Academic Pay," and "Period Activity Pay" concepts. Academic Staffing encompasses much of what is currently referred to as the "Faculty Lifecycle."

Academic Unit
A Workday organization type that represents a school, college, university, or other unit of your institution. These units can recruit prospective students, admit students, offer programs of study or courses, or administer financial aid. Academic units are also used with academic appointments in Workday.

Academic Unit Hierarchy
A hierarchical grouping of academic units primarily used for roll-up reporting.

Named Professorships
Named professorships and endowed chairs are prestigious awards funded by an endowment. They are associated with gifts that typically come from external donors but can also be from the institution itself. This feature isn't limited to professorships and chairs but can be used to define any gift-funded position that can be bestowed on a faculty member.

Period Activity Pay
The pay structure related to the unique schedules of adjuncts. Used to pay for just one academic term or other specific period of time.

Rank
Faculty rank.

Finance

Accounting Journal
An accounting entry that is recorded direct to the general ledger (vs. through an operational transaction such as an Expense Report, which ultimately creates a Journal).

Adjusted Per Diem
Expense Item. A cap on the daily per diem amount that is less than the specified amount by GSA based on an award.

Allocation Definition
Groups of allocation definitions.

Allocation Group Definition
Detailed information of an allocation including source, basis, target and offset of the allocation.

Balance Period
The period of time, such as current period, month-to-date, quarter-to-date or year-to-date, over which Workday calculates a pay component value.

Base Currency
Also known as default currency. The primary currency in which a company does business and reporting. Base pay wages for exempt and non-exempt employees excluding faculty and students.

Basis (Allocation)
The methodology to be used to distribute the allocated amounts.

Cash Sale
A process for recording cash and check deposits unrelated to receivables in Workday.

Control Account
A control account is a ledger account that accepts operational journals from operational transactions only, not accounting journals. When you create an accounting journal and select a control ledger account, Workday issues a warning. You can still save the journal line to the control account if necessary.

Create Receipt
The process of recording the receipt of goods and services to facilitate three-way matching of PO, Invoice and Receipt. Required for POs with a specific Spend Category.

Default Cost Center
Where all worker expenses are charged unless Costing Allocations are entered to override the Default Cost Center.

Direct Intercompany Invoices
Company that also operates as a customer creates a direct intercompany invoice to record the exchange of goods.

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Effort Certification

The business process used by an individual with direct knowledge or a suitable means of verification to affirm that the work was performed, stating that salaries and wages distributed to sponsored programs as direct charges are reasonable in relation to total University work performed over the certification period. Effort reporting is expressed as a percentage of total University effort. This is the process by which the University determines and documents the effort expended on sponsored projects.

Endowments

A fund established by a gift that is meant to provide lasting support to the institution whereby the gift itself is permanently invested in the institution's endowment and only the income is available for spending. Endowment funds may be for a restricted purpose (e.g. student financial aid) or for the unrestricted use of the institution. See Gift.

Expense Item

The field in the expense report that identifies the type of expense that was made and determines which fields are required by the user to complete. Expense Items are part of the FDM.

Expense Report

Used to account for out-of-pocket business expenses charged to a Travel Card. Also used to clear cash advances for travel and expenses.

Facilities and Administration (F&A)

Facilities and Administrative costs (F&A), commonly known as indirect costs, represent grant expenses that cannot be easily identified with any specific sponsored project but are incurred for common or joint objectives related to all sponsored projects.

Facilities and Administration Waiver

Agreement that F&A expense will be charged at a lower rate than sponsor's published rate.

Future Payment Plan

A type of bonus plan that can be paid out over multiple bonus plans, one-time payment plans, or both. Any remaining target amount can be paid in a final true-up payment.

Gift

External source of funds typically with usage restrictions (temporary or permanent). Gifts may be immediately expendable or invested in an endowment (see Endowments). Workday's Gift worktag captures all the expenses and revenue associated with gift activity. Gift is part of the FDM.

Income Distribution

Allocation of funds from foundation to institutions to support a gift's intended purpose.

Internal Service Providers

Someone within the UA System that is providing the service.

Invoice Adjustment

Workday's term for Credit Memo.

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Operational Journal
The journals that Workday creates automatically for operational transactions that are entered through the various Workday transaction tasks (e.g., Expense Report).

Spend Authorization (with Cash Advance)
Used to request a cash advance for expected out-of-pocket expenses. Since Spend Authorizations may be recorded for tracking purposes as well, users must select Cash Advance Requested when requesting cash advances. A budget of expenditures planned to be made for a future purpose. Your institution may require you to obtain pre-approval for anticipated expenditures before entering actual expenses in Workday. Spend authorizations act as a cost control. The process of creating a spend authorization is initiated by a worker. The manager takes actions on spend authorizations after they are submitted for approval.

Supplier
A supplier of goods and services to the UA System. Suppliers must be set up in Workday using the Supplier Request task. Also known as a vendor.

Supplier Invoice Request
The Supplier Invoice Request business process is used to request payment to a non-employee or supplier when a requisition and purchase order are not appropriate (e.g., bond payments).

Supplier Request
Used for requesting new suppliers in Workday (all suppliers must be established in Workday). This includes non-employees who need to be paid for services or reimbursed for expenses.

Finance: Assets

Asset Class
Grouping of assets that drive the depreciation classification and asset disposal. Examples of Asset Classes include Land, Land Improvement, Automobiles, etc.

Asset Types
Enable an institution to capture the property type of an asset and are used for reporting purposes. Examples of Asset Types include Leased, Non-depreciable, Personal Property, etc.

Finance: FDM

Chart of Accounts
A set of codes used to classify and record financial transactions; also known as foundation data model (FDM).

Accounting Worktags
Describes the nature of the transaction to support all financial and management reporting across the enterprise. Examples of Accounting Worktags includes but is not limited to Ledger Account, Spend Category, Revenue Category, Purchase Item, and Expense Item.

Derived Worktags
Attributes about an organization or worktag that can be defaulted in reporting based on the relationship (e.g., sponsor award contract or award info for a grant or where did a worker travel from/to and what airline for an expense report).

Reference Objects (worktags)
Inherent on the operational transaction itself and carry through to the accounting and can vary based on the type of operational transaction (i.e., suppliers and tax info on a supplier invoice, employees on expense reports, sponsors/customers on AR, deduction recipients on payroll deductions).

Revenue Category
Provides a sub-classification of the ledger account to provide more granularity for reporting. Spend Category is part of the FDM. Used during operational transactions and reports.

Spend Category
Provides a sub-classification of the ledger account to provide more granularity for reporting. Spend Category is part of the FDM. Used during operational transactions and reports.

Finance: Grants

Award
Funds provided from an external sponsor for support of a project at an institution. Support from sponsors, including grants, contracts, cooperative agreements, gifts, etc. Workday captures the terms of the sponsored award on the Award object. Also known as Award Contract.

Award Line
Links the Grant and other worktags to the Award and specifies the costing (e.g., F&A rate and base) and reimbursable methods to be utilized. One or more Award Lines may be defined for an Award.

Award Purpose Code
Used to explain the purpose or focus of the award and are used for reporting. Award Purpose Codes are assigned to the Award. (i.e., Sponsored Research, Clinical Research, Community Outreach, etc.).

Award Schedule
Workday allows the definition of a calendar for an award's particular program year. Award periods are based on quarter and annual intervals that begin on the start day of the award but may not necessarily align with an institutions' fiscal year.

Basis Limit
Workday provides the ability to limit the amount of facilities and administration expenses charged to an award. A Basis Limit is assigned to an Award Line.

Basis Type
Defines which expenses may be included as the basis for F&A reimbursement under the applicable rate.

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Grant

Sponsored grants are given to the institution in order to meet specific objectives in a program plan. The sponsor transfers money, property, services or anything of value to the institution in order to accomplish the grant objectives. Workday's Grant worktag captures costs and revenue for a sponsored grant. A Grant is part of the FDM.

Gift Classifications

- **Spendable Gift** – Non-endowed gifts that support a designated purpose
- **Non-Pooled Investment** – Used to designate an endowed gift managed by the Foundation
- **Undetermined** – Used for gifts that do not fit the classifications above
- **Pooled** – Not supported for UA System

Object Class

Object Class is a Worktag used by Workday to allow an institution to map internal cost categories to the categories detailed by a sponsor. Object Class is used to report budgeted and actual expenditures to the sponsor. Object Class is used to designate award restrictions and some facilities and administration cost rates.

Sponsor

An external funding source which enters into an agreement with the institution to support research, public service, or other sponsored activities. Sponsors include federal, state and local governments, foundations, other not-for-profit organizations, other colleges and universities, corporations, and other private businesses. Workday captures Sponsor information on the Sponsor object. Sponsors are associated with the Award in Workday. See Award.

Sponsor Award Types

Used to identify various types of Awards for reporting purposes (i.e., Contract, Cooperative Agreement, Grant, Subaward, etc.).

Sub-Award

An award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract. Workday subawards are used to manage and track subrecipient related costs and contacts.

Subrecipient

A non-Federal entity that receives a subaward from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of such program. A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency. Subrecipients must be Suppliers in Workday before they may be designated as a Subrecipient eligible for association with an Award in Workday.

Finance and HR

(Assign) Costing Allocation Business Process

The business process used to designate portions of an employee's pay to multiple FDM values (i.e., cost centers, grants, programs, etc.).

Cost Center
The cost center to which charges for an employee are applied. Identifies financial responsibility and management for officially acknowledged business units (e.g., departments, sections, etc.). Cost Center is used for both local and University-level management reporting. Cost Center is part of the FDM.

Effective Date
The date on which a change or event takes place.

Employee Visibility Date
A field in Workday that controls when a worker can see a transaction on their record. If an employee is promoted, it will be when the employee will see that promotion effective on their record (e.g. job profile changed or a new hourly rate applied).

Frequency
The rate at which something occurs or is repeated over a particular period of time. Sample values include weekly, bi-weekly or monthly. Frequency is used in both Finance and HCM (e.g., payroll calculations).

Finance: Inventory

Goods Delivery
Delivery option for Workday to track shipment status.

Inventory Adjustment
Workday action performed to adjust inventory on hand.

Inventory Lot
Defined quantity of an item as a unit of inventory. Lots are tied to a specific purchase item and has its own transactions on top of regular inventory transactions.

Inventory Picking List
Pick list generated after a stock request/requisition.

Inventory Shipping List
Ship list that's generated after pick list event has been completed.

Inventory Site
A hierarchy unit used to group stocking locations that are managed as a unit with policies that apply to all stocking locations in that particular inventory site. Note that an inventory site may act as a stocking location.

Inventory Stocking Location
Identifies where items are physically stored, tracked and inventory transacted. Stocking Locations may have multiple levels tied to one Inventory Site. For example, Inventory Site > Aisle 1 > Bin A. Aisle 1 and Bin A can be stocking locations.
- Note that Stocking Locations are not available to Lot Controlled purchase items.

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- Stocking Location can be driven by the Put-Away Rules; however, Put-Away Rules are optional.

Par Location
Location where you store goods and keep at a certain inventory level to consume. Generally, it is less important to know exactly how many items are in the par location and more important to ensure there is always enough inventory when needed.

Finance: Projects

Project
An undertaking that encompasses a set of tasks or activities having a definable starting point and well-defined objectives. Usually each task has a planned completion date (due date) and assigned resources. The Project worktag in Workday captures expenses and revenue (as appropriate) associated with the project. Project is a part of the FDM.

Resource Plan
Resource plans enable workers to charge time against a project, and managers to assign workers to projects and estimate their cost.

Finance: Revenue

Customer Category
Used to group customers in Workday. Only one Customer Category may be assigned to a Customer. The Customer Category is exposed to the accounting rules such that it may be used to derive the revenue accounting entries. Customer Categories are also used for reporting and searching. Examples include Corporations, Hospitals, Educational Institutions, etc.

Customer Group
An alternate method to group customers but is not exposed to the accounting rules. A Customer may be assigned to one or more Customer Groups. Customer Groups are used for reporting and searching.

Finance: Suppliers

Supplier Alternate Name
Enables you to use a different name from legal name of a supplier in printed and electronic transactions (ex: Alternate Supplier Connection; Remit To Payee; Remit To Advice Name, Reference, etc.).

Supplier Categories
Supplier categories classify suppliers for reporting and price negotiation purposes (ex: academics, athletics, and supplies).

Supplier Classification
Supplier classification enables you to meet the compliance reporting needs by federal, state or local government agencies (ex: Annual report to Supplier Diversity Program).

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Supplier Connections
You can create supplier connections to remit invoices and payments to different supplier addresses, email addresses, and settlement bank accounts.

Supplier Groups
Supplier groups organize suppliers for reporting and price negotiation purpose (ex: facilities, hardware, software).

Supplier Portal
External supplier site where prospective and existing suppliers can update their supplier information and view or apply to open bids.

Human Resources

HR: Absence/Time off

Absence
Workday term for time off or leave (of absence) that can either be paid or unpaid.

Leave Family
A leave family is a set of similar leave of absence types. For example, a company-specific leave family might include disability leave and bereavement leave, while a separate regulatory leave family might include jury duty, family medical leave act (FMLA), and similar leaves. Workday displays the Leave Family Name as a category of leave types for requesters to select from when entering leave requests.

Leave of Absence Rule
Rule used to define worker eligibility for leaves of absence and to define validations that prevent users from submitting invalid leave requests.

Leave Type
Defines rules that apply to a specific type of leave of absence, such as jury duty or FMLA. Identifies the leave of absence family and unit of time for leave requests. It can also identify employee eligibility rules for requesting a leave, validation rules for preventing invalid requests, whether to track entitlement balances, and other options.

Time Off
Reported time that is not worked. Common types of Time Off include sick leave, jury duty, and vacation.

Time Off Type
Indicates a "time off type" employees can request, such as Sick Time or Vacation.

HR: Benefits

Additional Benefits Plans
Additional Benefits plans can be used to define miscellaneous benefits that don't fit into any of the other mentioned categories. For example, pet insurance, gym membership or a commuter plan. Additional

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Benefits plans also allow for either an amount or percentage contribution, such as a United Way contribution.

Affordable Care Act Measurement Feature

The ACA measurement feature averages hours worked during a (configured) measurement period between 3 and 12 months, depending on customer requirements. Based on those results, it sets a field called Qualified as Full Time Based on ACA Measurement Period (often referred to as the ACA FT flag) that indicates whether the employee exceeded the hours threshold (i.e., 30 hours per week or 130 hours per month) during the period over which they were measured. You can apply this flag to benefit eligibility rules and the passive event process will automatically react to eligibility changes and generate benefit events to offer or terminate coverage as applicable.

Affordable Care Act Reporting

Workday provides the ability to automatically generate and submit to the IRS information required for 1094-C and 1095-C reporting for customers who track benefit offers and election history for medical coverage in Workday Benefits.

Benefit Annual Rate

An amount that is different than total base pay in which benefit rates or coverages should be based on.

Benefit Coverage Type

A type of benefits coverage where each type may contain one or more specific benefit plans. For example, you could define Medical, Dental, Vision, Group Term Life, Long Term Disability, and Short-Term Disability benefit coverage types.

You can set rules for benefit elections at the Benefit Coverage Type level. For example, you can restrict an employee to selecting only one plan of a specific coverage type. You can also specify which coverage types are available for employee election during which benefit events. For instance, for birth of a child, you could allow a Dependent Care FSA election.

Benefit Defaulting Rule

Identifies the benefit plans, coverage targets, and coverage amounts that employees receive by default when they do not complete an enrollment event.

Benefit Event

An event in the employee's life that gives the employee the opportunity to change benefit elections. These include staffing changes (such as getting hired or promoted) as well as life events such as getting married or having a child.

Benefit Event Rules

These rules specify coverage increase limits, Evidence of Insurability (EOI) requirements, waiting periods, and other rules and conditions of enrollment for benefits enrollment events.

Benefit Event Type

Identifies the events that trigger benefit enrollment, for example open enrollment, new hire or the birth of a child. It also identifies the coverage types to make available to employees when an event of this type occurs.

Benefit Group
A Benefit Group identifies workers who are eligible for the same general set of benefits and have the same rates and processing rules, such as age 'as of' rules, evidence of insurability effective 'as of' rules, coverage begin and end rules, as well as benefit defaulting rules. Workers can only be eligible for one benefit group.

Benefit Provider
Carriers or Vendors that administer an organization's benefit plans.

Benefit Surcharge
Additional costs applied to coverage targets on health care plans and rates. They can be applied to a spouse or domestic partner. Surcharges are applied as a deduction.

Coverage Targets
Coverage Targets define who can be enrolled in health care, insurance, or additional benefit plans.
- Health Care plan examples are Employee Only or Employee and Spouse.
- Insurance examples are Spouse or Children.
- Additional Benefit plans can have any values needed in configuration such as Family, Zone 1 or 3 pets.

Cross Plan Dependency Rules
Make enrollment in one or more primary plans a requirement or a restriction for enrollment in a secondary plan. Common examples are:
- Make the election of a High Deductible Health Care Plan (HDHPs) a prerequisite for electing a Health Savings Account Plan (HSA).
- Restrict a Supplemental Spouse Life coverage to 50% of the Employee Supplemental Life coverage.

Eligibility Rule
Conditions an employee must meet to be eligible to receive a particular benefit.

Enrollment Event
Any event that results in a gain or loss of benefits coverage. This encompasses both open enrollment and benefit events, such as a new hire, a termination, the birth of a child, and a job change. For each event, the benefit plans and elections that become available or are lost to employees as the result of that event must be specified.
- For example, medical, dental, basic life, supplemental life and vision plans can be made available to new hires; by contrast, for the birth of a child, only basic life, supplemental life and medical coverage might be made available to affected employees.

Enrollment Event Rule
The Enrollment Event Rule controls a number of items when employees make elections. Some of these include the coverage begin and end dates, deduction begin and end ends, allowable changes by event, and benefit defaults should an employee not submit their elections within the specified period of time. The Enrollment Event Rule also controls rules for EOI and guaranteed issue amounts.

Evidence of Insurability (EOI)

EOI can be configured to be required when an employee makes certain insurance elections and then they need to provide a statement of good health. During this process, their coverage amount can default to a certain amount such as a guaranteed issue amount or their current coverage.

Health Care Classification

The user-defined type of provider organizations for a health care plan, such as PPO, EPO, HMO, and DHMO.

Health Care Plans

Plans that provide health care coverage, such as medical, dental, vision.

Health Savings Account Plans

A Health Savings Plan is a tax-advantaged medical savings account available to taxpayers in the United States who are enrolled in a high-deductible health plan. The funds contributed to an account are not subject to federal income tax at the time of deposit. Unlike a Flexible Spending Account (FSA), funds roll over and accumulate year to year if not spent.

Insurance Coverage

Insurance coverages that are either increments of currency ($10,000, $11,000, etc.), multiples of salary (1x, 2x, 3x, etc.) or percent of salary (50%, 60%, etc.).

Insurance Plans

Plans that provide income replacement in case of death, disability, and accidents, such as life insurance, long-term disability, accidental death & dismemberment, etc.

Life Event

A kind of benefit event that occurs in the employee's personal life, for example, getting married, having a child, or retiring.

Multiplier-Based Coverage

Insurance coverage based on multiples of salary, for example, 1x, 2x, 3x, 4x, 5x, or 6x salary.

Open-Enrollment Event

This benefit enrollment event controls the benefits open enrollment process. Unlike benefit event enrollment, which is triggered by an event in a specific employee's life or work, the open-enrollment event applies to an entire, chosen employee population for the calendar year, for example.

Passive Event

Events that result from the passage of time rather than from a specific change to employee data. For example, you can set up a passive event to track and manage benefit eligibility for employees who reach the age of 65 (retirement age). Based on the event rules, Workday automatically searches for employees turning 65 and generates an enrollment event to record any benefit changes.

Related Person Relationships
Types of relationships and if they can be used as a dependent, a beneficiary, an emergency contact or any combination of the 3.   Workday delivers common values, but any additional values used by an organization can be configured.

Retirement Savings Plans
Retirement Savings Plans enable you to allocate funds toward retirement. These funds can be employee and/or employer contributions, and they can be percentages or flat amounts.

Spending Account Plans
A Flexible Spending Account (FSA) is one of a number of tax-advantaged financial accounts that can be set up through a cafeteria plan of an employer in the United States. An FSA allows an employee to set aside a portion of earnings to pay for qualified expenses as established in the cafeteria plan, most commonly for medical expenses but often for dependent care or other expenses. Money deducted from an employee's pay into an FSA is not subject to payroll taxes.

HR: Compensation

Request Compensation Change Business Process
Used to initiate a change in compensation.

Total Base Pay
Total Base Pay will equal an employee's salary. You will not be able to edit this field.

HR: Core

Assignable Roles
Users can assign positions to organization roles. Depending on your staffing model, a position may or may not necessarily have a worker specified.

Business Title
The title created by the department or Supervisory Organization and used to describe the person's position and responsibility (e.g. Professor of Economics).

Business Unit
Business unit represents the area of business in which that the Employees activities are grouped. Business Unit is assigned to each position throughout the organization. If position is not dedicated to a specific Business Unit or Segment, or if the role has enterprise scope, the business unit of "Corporate" will be used. NOTE: While this definition is accurate, UA System has not made a final decision on how they will end up structuring the org types/subtypes.

Budget Checking – Position Control
Determines if sufficient position budget is available before enabling a position change that impacts the position budget.

Commitment
Amount reserved for unfilled positions. Workday terminology for pre-encumbrance.

Commitment Adjustment
Value that represents the difference between the previous commitment amount calculated for a position restriction and the current amount calculated. Can be calculated in real time with budget check or in bulk without budget check. Examples include:
- Mid-year compensation changes.
- Mid-year costing allocation changes.
- Hires.
- Adding additional jobs.
- Open positions.

Fringe Benefit for Position Control
Amount reserved for burden (estimated employer expense).

Headcount
The number of workers in an organization.

Initial Commitment
Amount reserved at the beginning of a fiscal year for commitments and obligations.

Job Category
Attached to a job profile, user-defined job categories allow you to track additional job information. You can define any job category that fits your business, for example, whether specific workers, jobs, or positions are "Direct Labor" or "Indirect Labor." The job category displays on the position and facilitates reporting at the position level.

Job Requisition
Approved request to fill a position or chair.

Job Title
The title of the worker in their assigned job; defaults from the Job Title field or Job Profile Name field on the position description.

Obligation
Amount reserved for filled positions. Workday terminology for encumbrance.

Position
A seat filled by an employee. Also knowns as a filled position or chair in Workday.

Position ID
A code associated with a position.

Position Management
One of two staffing models available to use in Workday. Position Management provides the greatest control over hiring, as you can specify different staffing rules and restrictions for each position.

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Position Restriction
Unfilled position or chair.

Staffing Event
Processes found across HR, Payroll, and Compensation business processes.

Staffing Model
A structure that defines how jobs and positions are created and filled in a supervisory organization. Workday supports 2 kinds of staffing models: Job management and position management.

HR: Payroll

Payroll for Position Control
Amount reserved for compensation.

Off-Cycle Payment
A payment made outside the regularly scheduled payroll run. Manual, on-demand, reversals and history payments are classified as off cycle.

On-Demand Payment
An off-cycle payment that replaces, or is issued in addition to, a worker's on-cycle pay.

Supplemental Earning
Compensation paid in addition to an employee's regular wages, included but not limited to severance, dismissal pay, vacation pay, back pay, bonuses, moving expenses, overtime, and commissions.

Time Proration Rule
Prorates employees' target compensation in a bonus or merit increase compensation event according to time-based criteria such as leave of absence or time since hire.

Total Compensation
Within the Pay Worklet, selecting Total Compensation allows you to view the breakdown of your salary, benefit costs and employer benefit contributions.

HR: Recruiting

Target Hire Date
Field within Create Job Requisition business process. It is the earliest date on which a candidate can be hired, based on the posting policy for university recruitment.

Requisition – Position
A request to fill a new or existing position.

HR: Talent and Performance

Competency
A functional or technical ability needed to perform a job. In Workday, you can associate competencies with job families, management levels, job profiles, and positions.

Review Template
A collection of instructions, sections, and questions that can be used to start an employee review. A template is specific to a review type. Workday supplies several sections (for example, Responsibilities and Competencies) from which you can select the appropriate ones for the specific template you wish to select or create.

Self-Evaluation
An employee's self-review as part of a performance review process.

HR: Time Tracking

Accrual
Defines how much time off employees can accrue, the timing of the accrual, and other rules. Can define eligibility rules, frequency and limits that differ from the time off plan.

Carryover Limit
The maximum amount of time off employees can carry over from one balance period to another.

Period Schedule
Defines the accrual frequency for a time off plan, such as annual or monthly (unless the plan has a custom frequency), and the start and end date of each reporting period; also controls reporting of both accruals and time off requests.

Time Calculation
A set of rules to apply time calculation tags to calculated time blocks for Payroll or other purposes. Example: You could create a time calculation to convert regular hours into overtime hours automatically if a worker works more than 40 hours in a week.

Time Calculation Tag
Workday applies calculation tags to time blocks during time calculations. The tags map to payroll earnings to drive how time blocks are paid and can be included in time off and accrual calculations. You can also use them to display time and time off totals on the time entry calendar.

Time Clock Event
A time clock event describes a worker's actions, such as a check-in or check-out, on the web time clock or an external time clock. Workday matches time clock events to form time blocks, which workers can edit and submit.

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Time Entry Calendar

A set of self-service pages that workers use to enter, edit, and submit time, when using calendar-based time entry. When using high volume time entry, workers can view and submit time from the time entry calendar.

Time Off

The rules that apply to a specific type of time off, including eligibility rules, whether adjustments are allowed, and limits that differ from the time off plan.

Time Off Plan

The rules for entering and tracking 1 or more related time offs. Identifies the unit of time, eligibility requirements, whether to track balances, and if time offs are position-based or worker-based.

Work Schedule Calendar

A calendar in Workday that defines the days and hours that a worker is scheduled to work. In Time Tracking, work schedule calendars affect time entry options, calendar displays, and time calculations.

Safety (Physical)

Safety Incident Tracking

The Workday framework for safety incident tracking helps you identify and track safety-related trends and problems. Required details include the incident date and time, location, and the name of the person reporting the incident. You can provide information about each involved party in an incident, such as the nature of injury or illness, investigation details, and time lost. You can also add notes and attachments.

Security (Workday)

Aggregation Security Group

A security group whose members are other security groups.

Employee-as-Self

Workday security role automatically assigned to each institution employee.

Inherited Roles

Security roles assigned to a position inherited by the person who is hired or transferred into that position.

Job-Based Security Group

A job-based security group includes one or more job-related attributes or objects including job profile, job family, job category, management level, or exempt/non-exempt status. It is assigned to the position rather than the person.

Location Membership Security Group

A location membership security group is one whose members are any workers assigned to that location.

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Manager-as-Self
Workday security role automatically assigned to each supervisor or manager with at least one direct report; able to initiate many processes performed by managers. e.g. approve time, approve absence, initiate performance review etc.) Manager would also be auto-assigned Employee-as-Self security role.

Roles
Designations that determine access to perform the Initiate, View and Modify, Cancel or Rescind, and Approve business processes. They determine what a user can see and do in Workday

Security Group
A security group is a collection of users, or a collection of objects that are related to users. Allowing a security group access to a securable item in a security policy grants access to the users associated with the security group.

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