

Project One Student Working Glossary of Workday Terms

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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 academic units, students, programs of study, 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.

Effective Date

The date on which a change or event takes place.

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.

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.

Student Self Service

Functionality within Workday that allows students to access information and manage commonly used tasks.

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

A unique instance or environment of the Workday system with data separated in a database. A tenant can be labeled as development, testing, 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.

Workday Navigation

Actions and View

Buttons to commonly grouped tasks and reports. Accessed through Apps.

Bulk Approvals

The bulk approvals option allows you to approve multiple Inbox items and will only appear if a user has at least one approval step awaiting review.

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.

Profile

Click on your name or picture to view your profile, access all menus including your Inbox and notifications, manage your user preferences, or sign out of your Workday session.

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.

Workday Icon

Click on the Workday icon to return to your home page. (This may be replaced with your institution's logo.)

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.

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 Staffing

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.

Student

Student Core and Academic Foundation

Academic Calendar

An academic calendar serves as a template that defines the standard format for an academic year, for example, a semester containing a fall, spring, and summer period.

Academic Level

Academic levels are the level of an education objective that a student can achieve at your institution. Examples include undergraduate, graduate, professional, associate, or continuing education.

Academic Period

Academic periods are the fixed date ranges defined by your institution that make up an academic year such as semesters or quarters.

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.

Academic Unit Subtype

Academic unit subtypes are used to classify your academic units. Examples include school, department, institute, center, or college. You can then include the academic units you create in an academic unit hierarchy.

Campus Engagement

Campus engagement refers to the system of managing and tracking your institution's interactions with current and prospective students.

Conversation Tag

A descriptor, such as Dietary Restrictions or Special Needs that you can assign to an engagement conversation to identify its topic. You can search for conversations by conversation tag.

Conversation Topic

A conversation tag or recruiting event name that you can associate with an engagement conversation to make conversations easier to find.

Designation

An attribute, such as Community Learning Partner, Honors, or STEM, that you can associate with educational institutions and external associations to make them easy to find and report on.

Dynamic Period

A date that identifies the anticipated start date for a student of online education or other asynchronous learning.

Educational Taxonomy

A taxonomy scheme and set of codes you can assign to programs of study and their concentrations to meet state, local, or other classification requirements.

Engagement Action Item

Defines a requirement that must be met for an application for admission to be considered complete.
Example: Submit transcripts.

Engagement Item

An engagement email or printed engagement item. You can include engagement items in engagement plans and use them to support student recruiting events.

External Association

A nonprofit, community-based, or other noneducational organization that you can associate with student prospects or identify as a location for recruiting events.

External Engagement Item

Used to send and track third-party engagement items for recruiting events, communication plans, or ad hoc communications.

Match and Merge

A process that helps eliminate duplicate student prospect information in Workday.

Matriculation

Refers to the point in which an applicant is formally admitted to the institution, changing their status from prospect to student. A matriculated student can begin the onboarding process.

Program of Study

A program of study is an academic track that students can follow and complete to earn an educational credential that you define. Each program of study is tied to an academic unit and academic level.

Recipient Threshold

The maximum number of prospects to whom you can send an engagement item at the same time without requiring approval.

Student Financials and Financial Aid

Calculations

Calculations are assigned to Registration-Based Fees and Course Fees to ensure only appropriate students receive appropriate tuition & fees. *Example: A Calculation determines that only nonresident students receive nonresident tuition.*

Charge Assessment

The Workday term used to describe the assessment of tuition & fees to the student account. Charges that come onto the student account through Charge Assessment are automatic and do not need to be posted manually.

Charge Assessment Schedule

A configuration item that sets up Charge Assessment to run during nightly orchestration for a period of time for a group of students. When a change occurs during the day that affects a student's tuition & fees, such as adding or dropping a course, the Charge Assessment Schedule will ensure the student is automatically run through Charge Assessment at night if the date range includes today (the day the scheduling change occurred). At least one Charge Assessment Schedule must be set up for each standard Academic Period (Fall, Spring, & Summer).

Charge Item

The transaction/line item the student sees on their student account. This is also the link to Accounting/Financials. A charge item is assigned to a Registration-Based Fee or Course Fee for automatic assessment to the student account.

Course Fee (Additional Fee)

A configuration item that is used to charge students an additional fee specific to a specific course. *Example: An additional \$50 lab fee is a Course Fee charged for Biology 101.*

Due Date Rule

Workday uses this rule to automatically calculate the payment due date when you post a charge to a student's account.

Federal Student Aid (FSA) Program Rule Set

The Federal Student Aid (FSA) Program Rule Set configuration gives you the ability to define what aid programs are relevant to a program of study.

Financial Aid Action Item

Action items are used to assign requirements and collect information from students.

Financial Aid Attendance Plan

Financial aid attendance plans display the enrollment information required to award financial aid and calculate student charges. This information includes past, present, and possible future course enrollment for a student.

Load Status Policy

This policy is used to indicate the minimum number of units a student must enroll in to be considered a full-time or part-time student.

Private Scholarships

Private scholarships come in from outside sources such as rotary clubs, churches, or other community organizations. Foundation Scholarships are not considered private scholarships in Workday terminology. In Workday, Private Scholarships are typically one-off and/or infrequently received scholarships from relatively small, often local and/or religious organizations. At most University of Arkansas System

institutions, private scholarships are recorded by Student Financials and then routed to Financial Aid and automatically added to students' Total Financial Assistance report.

Registration-Based Fee (RBF)

A configuration item that is used to charge students based on total registration for all courses.

Example: Tuition is charged at \$1,000 per credit hour. \$10,000 Tuition is charged as a Registration-Based Fee to a student based on 10 total units from 3 course registrations.

Revenue Category

A worktag used for aggregate reporting of revenue associated with student charges. It is also used as a dimension in the account posting rule to drive ledger accounting.

Statement

A statement is a Workday-generated report designed to inform students of their balances and overall financial account activity by academic period in a printable PDF version. While Statements and invoices are similar, Statements are provided to students; invoices are sent to sponsors of Student Sponsor Contracts (e.g. Walmart, IBM, etc.) in order to collect payment.

Student Charges

Student charges represent the various costs, fees, and other amounts that students are charged over the course of their academic careers. Your institution decides what items to charge students for, the due dates for charges, and which charges apply to which groups of students based on their academic unit or program of study.

Student Charge Item

A student charge item represents an actual, specific cost that the student incurs and must pay to be eligible for completion of their program of study.

Student Cost Item

Student cost items are individual elements used to build the student cost of attendance for financial aid awarding.

Student Award Item

Award items are financial aid awards in a student's financial aid package. Award items include many types of financial aid, such as Federal grants and loans, State scholarships and grants, and institutional scholarships, including academic and donor-funded foundation scholarships. While sponsor contracts, waivers, and private scholarships also are payment sources that can affect students' financial aid packages, these items are not categorized as Student Award Items in Workday. Student Award Items are managed by Financial Aid.

Student Payment Item

These items identify the forms of payment you can accept from students, their parents, and other individuals on behalf of your students. Payment items are specific to an academic unit.

Student Sponsor Contracts

Sponsor contracts enable outside entities to pay educational expenses for one or more students. These entities may consist of corporations, educational institutions, government bodies, and third-party organizations. Student Sponsor Contracts are managed by Student Financials in Workday.

Student Waiver

Student waivers can be understood as discounts provided to qualifying students. Some examples of Student Waivers provided by University of Arkansas System institutions include waivers for Arkansas residents who are 60 years of age or older, waivers for employees, and waivers for employee dependents. Student waivers are managed by Student Financials in Workday and are always nonrefundable.

Student Records, Advising, and Curriculum Management

Competency

Competencies are goals for measurable proficiency in a subject matter being covered in a course.

Course

A course is a series of lessons in a particular subject, typically leading to qualification. They can be taught in multiple formats (e.g., lectures, labs) and students may be required to enroll in multiple instructional formats to complete the course.

Course Definition

Contains all data about a course, including its format, grading behaviors, and controls along with its relationships with other courses or objects in Workday.

Course Equivalency Group

A group of courses that overlap in content to the extent that institutions deem equivalent for various purposes/requirements.

Course Section

A course section is a time-specific representation of a specific instructional format of the course. This is the object that students will actually register in.

Learning Outcome

Learning outcomes are used to define the skills that make up a competency.

Section Cluster

Clusters that consist of multiple course sections that are designed to be taken together. When creating a section cluster, you can select a course to combine multiple sections of the same course, or multiple courses to combine sections of those different courses.

Student Activity

An education offering that is similar to a course but occurs outside the classroom. For example, new student orientation, study abroad programs, and practical learning sections offer students educational opportunities but do not exactly fit the model of the course / section structure.

Student Cohort

Students that are grouped together for advising purposes, using criteria that you select such as grade, program of study, or class standing.

Total Academic Requirement

Represents the total number of units a student must complete in order to complete their program of study.

Student Recruiting and Admissions

Academic Date Range

The period of time associated with a student recruiting cycle.

Admissions Counselors

Individuals your institution designates to perform the bulk of recruiting activities including recruiting prospective students and reviewing applications. These individuals can be admissions officers, faculty members, staff, student workers, volunteer alumni, and others, including non-employees and guests.

Application Action Items

Actions that can be used to define a requirement that must be met for an application for admission to be considered complete.

Application Grouping

A grouping of applications for the same admitting level of an academic unit and the same anticipated start date. Groupings can have 1 or more application pools, with an admissions counselor assigned to each pool.

Application Pool

A subset of applications within an admissions cohort and can be assigned to a separate Admissions Counselor. Separating the applications into smaller groups enables you to control and adjust the workload for counselors at your institution.

Application Requirements

After creating application action items in the system, you can assign the actions to specific academic units, levels, and programs of study. These action items must be completed before the application is considered complete.

Fast Path

A streamlined approach to moving applications for admission from submission to matriculation as quickly as possible. Fast path programs of study do not require the completion of requirements or review, and are, instead, directly admitted and matriculated upon completion of the application.

Recruiting Campaigns and Events

Campaigns and events focused on recruiting specific sets of student prospects, such as athletes or prospects who live in a particular recruiting region. Each campaign can include multiple recruiting events, such as a high school campus visit, designed to interact with student prospects and create interest.

Recruiting Cycle

A recruiting period for 1 or more academic levels of an academic unit. You associate recruiting cycles with campaigns to measure the effectiveness of each campaign per recruiting cycle.

Recruiting Regions

Geographical areas that have been identified for your admissions counselors to focus their recruiting efforts will make your student recruiting more manageable.

Student Prospect

An individual who has shown an interest in attending your institution or who you are interested in recruiting.

Student Prospect Profile

A worklet that displays information for a prospective student, including contact information and recruitment details.

Student Prospect Stage

A value, such as Lead, Inquirer, Pre-Applicant or Applicant, that identifies where a student prospect is in the recruitment or admissions process.

Student Prospect Type

A value, such as First Year or Adult Returning, that you can assign to prospective students and use to match student prospects to admissions counselors automatically.

Student Recruiting Region

Workday term for recruiting territory. A recruiting region can represent a geographical area, 1 or more schools, or schools in selected school districts.

Student Tags

An attribute, such as Veteran, Athlete, or Scholarship Recipient, that you can assign to student prospects. You can use tags to match student prospects to recruiters automatically, find prospects, and use as criteria for associating engagement plans with prospects.

Finance

Finance: Core

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).

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.

Basis (Allocation)

The methodology to be used to distribute the allocated amounts.

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.

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.

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.

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.).

Human Resources

HR: Core

Assignable Roles

Roles that are assigned to positions rather than people. This enables security access to remain with a position when a worker terminates or transfers, and can carry over to a new worker within the position. Those assignable roles are then assigned to academic units, organizations, or other role-enabled instances. 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).

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..

Position

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

Position ID

A code associated with a position.

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.

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.

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.