



Project One Student Glossary of Workday Terms for Faculty

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

Student Recruitment Lifecycle Terms

Term	Definition
Lead	An individual whose information has been obtained by the school without the person having expressed interest first.
Prospect	An individual who has shown interest in a school or whom the school is interested in recruiting.
Inquirer	An individual who has in some way expressed interest in the school.
<i>Note that Lead/Prospect/Inquirer can be used interchangeably – the institution can determine how they want to use each option.</i>	
Pre-Applicant	An individual who has submitted unsolicited supporting materials (e.g. transcripts, test scores) or has an in-process application.
Pre-Matriculant	An individual who has been admitted to a school but has not yet completed all of the requirements to be considered a student. Note that students “stuck” in Pre-Matriculant are usually pending a duplicate management review and resolution.
Student	An individual who has been matriculated and is pursuing courses towards a degree or certificate at a school.

Workday Navigation Terms

Term	Definition
Actions and View	Buttons to commonly grouped tasks and reports. Accessed through Apps.
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.
Dashboard	Dashboards are preconfigured pages for users to quickly view common reports, access tasks, find external links, and read announcements in one location. Dashboards are automatically assigned to roles based on security groups.
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)	The Related Actions icon, which is a row of three small dots, means there is more information or related actions to what you're viewing on the screen. Clicking the related actions icon will display the possible actions available for a given report or topic.
Task	A step, either standalone or in a business process, that you must complete. Example: Business process steps trigger notifications or inbox alerts.
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.

Workday Student Terms by Functional Area

Term	Area	Definition
Academic Appointment	Academic	In Workday, academic appointments are used to track key information related to a faculty's academic relationship with the university, including academic dates, academic unit, rank, title, and tenure status.
Academic Calendar	Academic Foundation	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 History	Student Records	A transcript of all courses taken externally and internally.
Academic Level	Academic Foundation	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 Foundation	Academic periods are the fixed date ranges defined by your institution that make up an academic year such as semesters or quarters.
Academic Plan	Academic Advising	Academic plans are a tool to help academic advisors plan out what courses a student should take during each academic period to satisfy the academic requirements for their program of study. Plans can be created for current and/or future academic periods.
Academic Progress (Student's Academic Progress)	Student Records	Degree Audit/Requirements for a program of study and the student's progress towards their degree. The report will list all the requirements that are met and still need to be met.
Academic Staffing	Academic	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	Academic Foundation	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	Academic Foundation	A hierarchical grouping of academic units primarily used for roll-up reporting.
Academic Unit Subtype	Academic	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.
Active Student	Student Records	A student currently enrolled or eligible to enroll in a course at your institution.
Application Action Items	Recruiting and Admissions	Actions that can be used to define a requirement that must be met for an application for admission to be considered complete.
Application Requirements	Recruiting and Admissions	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.
Approval Chain	General	The hierarchy of roles to approve a business process. The approval chain defines the workflow.
Approver	General	Designated participant(s) in a business process, with a defined responsibility, indicates they approve the proposed action so the business process can proceed.
Business Process	General	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.
Campus Engagement	Academic Foundation	Campus engagement refers to the system of managing and tracking your institution's interactions with current and prospective students.
Cloud-based	General	Refers to software and services that run on the Internet instead of on a server at your institution or locally on your computer.
Clustering	Student Records	A section level requirement that two or more specific sections must be taken at the same time to register. Example – If you take College Algebra section 103, you must take Math Lab Support section 103.

Cohort (Student Cohort)	Student Records	Student cohorts are groupings of students that share characteristics like program of study, academic unit, academic advisor, class standing, etc.
Competency	Student Records	Competencies are goals for measurable proficiency in a subject matter being covered in a course.
Condition Rule	General	A condition that defines the routing of workflow within a business process.
Contact	General	The information needed to get in touch with a person such as phone number and address.
Co-Requisite	Student Records	A course level requirement that two or more courses must be taken at the same time to register. Example – If you take any General Biology section you must take any General Biology Lab section.
Course	Student Records	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	Student Records	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	Student Records	A group of courses that overlap in content to the extent that institutions deem equivalent for various purposes/requirements.
Course Section	Student Records	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.
Designation	Academic Foundation	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	Academic Foundation	A date that identifies the anticipated start date for a student of online education or other asynchronous learning.
Educational Taxonomy	Academic Foundation	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.
Effective Date	General	The date on which a change or event takes place.
Eligibility Rule	Student Records	Eligibility rules define who is eligible to take a course. For example, only first-year students are eligible for first year seminars. In Workday, eligibility rules are listed on the course description and enforced by the system, meaning only students who are eligible can register (without an override). Eligibility rules can be applied automatically for simple requirements, like pre-requisites or class standing. They also can be managed manually for requirements like instructor permission.

Engagement Action Item	Academic Foundation	Defines a requirement that must be met for an application for admission to be considered complete. Example: Submit transcripts.
Engagement Item	Academic Foundation	An engagement email or printed engagement item. You can include engagement items in engagement plans and use them to support student recruiting events.
Evaluate Academic Requirements for Student	Academic Advising	Task in Workday that allows for an advisor, record manager, or the student to view a evaluation of academic requirements for a program of study. This is often called a "what if" evaluation or "potential major change" evaluation.
Event	General	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.
External Records (Student's External Records)	Student Records	Location of external documents received for a student. Examples include test scores and academic transcripts.
Filter	General	Filters are used to sort out undesired data when running reports.
Financial Aid Attendance Plan	Student Financials	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.
Holds	Student Records	Holds can be placed on students' accounts to prevent certain activity in Workday, including registration.
Inactive Record	Student Records	A student's record will be inactive if that student has withdrawn from the university, has been dismissed or suspended, or has completed their program.
Initiate	General	The first step or transaction in a business process.
Initiator (Requestor)	General	A person enabled in Workday to create or start a particular business process.
Learning Outcome	Student Records	Learning outcomes are used to define the skills that make up a competency.
Load Status Policy	Student Financials	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.
Maintain My Student Appointment Availability	Academic Advising	Task in Workday that allows you to set, edit, or adjust your calendar availability for which students can schedule advising appointments.
Manager	General	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)	General	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.
Mass Register	Student Records	Task in Workday that allows an academic advisor or record manager to register students into classes. Using the Mass Register task allows one to select overrides and you can register multiple students at a time if desired.
Match and Merge	Recruiting and Admissions	A process that helps eliminate duplicate student prospect information in Workday.
Matriculation	Academic Foundation	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.
Named Professorships	Academic	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.
Organization	General	An organization refers to a grouping used to organize people, resources, workers, and other organizations.
Period Activity Pay	Academic	The pay structure related to the unique schedules of adjuncts. Used to pay for just one academic term or other specific period of time.
Program of Study	Academic Foundation	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.
Registration Troubleshooting Console	Student Records	Task in Workday that provides information about why a student could not register for a course or a course section.
Reports	General	Workday provides numerous reports which can be adjusted to produce a desired data output. These reports can be exported to Excel in order to work with the data or can be filtered and saved within Workday.
Requester (Initiator)	General	The person who requests or performs the first step in a business process.
Saved Schedule	Academic Advising	A schedule created by the student as a proposal for classes for a given academic period.
Section Cluster	Student Records	Clusters 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.
Security Roles	General	Designations that determine access to perform the Initiate, View and Modify, Cancel or Rescind, and Approve business processes.
Statement	Student Financials	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 Activity	Student Records	An education offering that is similar to a course but occurs outside the classroom. For example, new 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	Academic Advising	Students that are grouped together for advising purposes, using criteria that you select such as grade, program of study, or class standing.
Student Note	Academic Advising	Task in Workday that allows for documentation of conversations or meetings with a student. Notes can be shared with the student or the option to not share them with the student can be selected.
Student Onboarding	Student Records	Onboarding is a set of tasks and to-do items that students must complete upon matriculation. These tasks can include entering and editing personal information, establishing privacy settings, and reviewing and acknowledging school policies. Students will complete onboarding when they first begin at your institution and each following semester.
Student Prospect	Recruiting and Admissions	An individual who has shown an interest in attending your institution or who you are interested in recruiting.
Student Prospect Profile	Recruiting and Admissions	A worklet that displays information for a prospective student, including contact information and recruitment details.
Student Prospect Stage	Recruiting and Admissions	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	Recruiting and Admissions	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 Self Service	General	Functionality within Workday that allows students to access information and manage commonly used tasks.

Student Tags	Recruiting and Admissions	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 them as criteria for associating engagement plans with prospects.
Tenant	General	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	General	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.
Total Academic Requirement	Student Records	Represents the total number of units a student must complete in order to complete their program of study.
Workflow	General	Workflow defines who can perform each task and provides a routing mechanism to flow the task execution from one user to another.