

# Glossary of Workday Student Terms

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UNIVERSITY OF ARKANSAS SYSTEM

*powered by Workday*

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## Workday Navigation Terms

Term	Definition
Actions and View	Buttons to commonly grouped tasks and reports. Accessed through Apps.
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 based on security roles.
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.
Global Navigation Menu	Located on the left-hand side of the screen, the Global Navigation Menu provides immediate access to applications, reports, and tasks from any page in Workday. The menu is role-specific, but users can personalize certain apps and shortcuts to improve efficiency by adding, removing, or rearranging items based on their needs.
My Tasks	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.

## General Workday Terms

<b>Term</b>	<b>Definition</b>
Approval Chain	The hierarchy of roles to approve a business process. The approval chain defines the 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 Process	A sequence of one or more tasks that accomplishes a desired task. For example, hiring an employee, requesting an override, changing a grade for a student all start a business process. These processes can be comprised of Actions, Approvals, Approval Chains, To Dos, and/or Checklists.
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.
Cloud-based	Refers to software and services that run on the Internet instead of on a server at your institution or locally on your computer.
Condition Rule	A condition that defines the routing of workflow within a business process.
Contact	The information needed to get in touch with a person such as phone number and address.
Effective Date	The date on which a change or event takes place.
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.
Filter	Filters are used to sort out undesired data when running reports.
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.
Organization	An organization refers to a grouping used to organize people, resources, workers, and other organizations.

Prism	A Workday reporting and analytics solution used to combine multiple data sources into advanced reports, often refreshed on a scheduled cadence rather than in real time.
Production (PROD)	The live Workday tenant used by institutions for real-time business and student processes.
Reports	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)	The person who requests or performs the first step in a business process.
Sandbox (SBX)	A non-production Workday tenant used for testing, demos, training, and validating process changes before moving to Production.
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.
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.
Workflow	Workflow defines who can perform each task and provides a routing mechanism to flow the task execution from one user to another.

# Workday Terms by Functional Area

## Academic Foundations

Term	Definition
Academic Calendar	The framework that defines how an institution structures its academic years and periods, such as semester, quarter, or term-based models. The academic calendar serves as the template used to create future academic years.
Academic Level	The level of educational objective a student can achieve at your institution. Examples include undergraduate, graduate, professional, associate, and 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 Period Date Controls	Institution-defined dates that control student-facing and administrative actions within an academic period, such as registration start, add/drop deadlines, withdrawal dates, and financial aid processing milestones.
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 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.
Academic Unit Hierarchy	A hierarchical grouping of academic units primarily used for roll-up reporting.
Academic Year	The dated instance of an academic calendar that contains the academic periods for a specific cycle, such as 2027–2028.
Campus Engagement	The Workday functionality used to manage, track, and automate an institution's interactions with prospective and current students.
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 flexible date structure used to identify an anticipated start date for students in online, self-paced, or asynchronous learning models.
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.
Holiday / Non-Instructional Calendar	The calendar structure used to define institutional holidays, closures, and other non-instructional dates that may impact scheduling, attendance, and operational processing.
Matriculation	The point at which an admitted individual is officially converted into a student record in Workday, allowing onboarding, student tasks, and academic activity to begin.
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.
Standard Academic Period	The primary academic period structure used to define the core start and end dates of a term, such as Fall, Spring, and Summer.
Non-Standard Academic Period	A shorter or alternative academic period that falls within a standard academic period, such as 8-week, intersession, or module-based offerings.

## Recruiting and Admissions

<b>Term</b>	<b>Definition</b>
Applicant	An individual who has submitted an application for admission and is currently moving through the admissions review process.
Application Action Items	Configurable admissions checklist items used to define requirements that must be completed before an application for admission can be considered complete. Examples include transcripts, test scores, or residency documentation.
Application Requirements	The set of application action items assigned to specific academic units, academic levels, or programs of study that determine what must be completed for an application to move forward in the admissions process.
Match and Merge	A Workday process used to identify, review, and resolve duplicate prospect or applicant records so that recruiting and admissions activity remains tied to a single individual.
Student Prospect	An individual who is being actively recruited or has shown interest in attending your institution.
Student Prospect Profile	The Workday profile record for a prospective student that displays contact information, recruitment details, engagement history, and admissions progress.

Student Prospect Stage	A lifecycle value, such as Lead, Inquirer, Pre-Applicant, or Applicant, that identifies where a prospective student is in the recruiting and 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 Tags	Attributes, such as Veteran, Athlete, or Scholarship Recipient, assigned to student prospects for automated matching, filtering, reporting, and engagement plan assignment.

## Student Cycle in Workday

Term	Definition
Lead	An individual whose information has been obtained by the institution, typically through purchased lists, event participation, or outreach efforts, before the individual has directly expressed interest.
Prospect	An individual who has shown interest in attending the institution, or someone the institution is actively recruiting through admissions and engagement efforts.
Inquirer	An individual who has directly expressed interest in the institution through an action such as requesting information, attending an event, or beginning an inquiry form.
<i>Lead, Prospect, and Inquirer may be used interchangeably based on institutional recruiting practices. Each institution may determine how these stages are best used.</i>	
Pre-Applicant	An individual who has submitted unsolicited supporting materials (such as transcripts or test scores) or has started, but not yet submitted, an application for admission.
Pre-Matriculant	An individual who has been admitted to the institution but has not yet completed all required onboarding, checklist, or duplicate resolution steps needed to become an active student. Students who remain in this stage are often pending duplicate management review and resolution.
Student	An individual who has matriculated and is actively pursuing coursework toward a degree, certificate, or other educational objective at the institution.
Inactive Student	An individual who has completed their program, withdrawn, or otherwise left the institution and whose student record status has been changed to inactive based on institutional policy.

## Academic Advising

<b>Term</b>	<b>Definition</b>
Academic Plan	A planning tool used by advisors and students to map courses by academic period in order to satisfy the academic requirements of a program of study. Plans may be built for current and future academic periods.
Academic Requirement Effective Date	The effective date used to determine which academic requirements, curriculum rules, and catalog year apply to a student's program of study.
Evaluate Academic Requirements for Student	A Workday task that allows an advisor, records manager, or student to preview how coursework would apply to a selected program of study. This is commonly used as a "what if" evaluation during potential program or major changes.
Maintain My Student Appointment Availability	Task in Workday that allows you to set, edit, or adjust your calendar availability for which students can schedule advising appointments.
Registration Appointment	The specific date and time when a student's registration window opens and they become eligible to begin registering for courses for an academic period. The student may continue making schedule changes until the registration window closes based on institutional date controls.
Saved Schedule	A draft schedule for an academic period that allows planned courses and selected course sections to be reviewed in list and weekly calendar views before or during registration.
Student Cohort	A defined group of students used for advising, outreach, or case management based on shared criteria such as class standing, academic unit, program of study, or assigned advisor.
Student Note	A task in Workday used to document conversations, meetings, or important advising information related to a student. Notes may be configured to be visible to the student, so users should follow institutional documentation and privacy guidelines.
Support Network	The group of institution-defined support contacts visible to students in Workday, which may include academic advisors, financial aid contacts, student success staff, or other campus resources.
Unused Registrations	Course registrations that remain on the student's academic record but are not currently counting toward academic progress, GPA calculations, attempted credits, or requirement completion due to repeat, transfer, or requirement logic.

## Student Records

<b>Term</b>	<b>Definition</b>
Academic History	The student's complete academic record in Workday, including internal coursework, transfer credit, grades, academic standing updates, and related notes.
Academic Progress (Student's Academic Progress)	The Workday evaluation of a student's completed, in-progress, and planned coursework against the requirements of their declared program of study. This is commonly referred to as the student's degree audit.
Academic Progress Override	A manual adjustment used to apply a registration, transfer credit, or requirement exception to a student's academic progress when automated requirement logic does not apply it as expected.
Active Student	A student with an active academic record who is currently enrolled, eligible to enroll, or otherwise actively associated with an academic program at the institution.
Clustering	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 cohorts are groupings of students that share characteristics like program of study, academic unit, academic advisor, class standing, etc.
Competency	Competencies are goals for measurable proficiency in a subject matter being covered in a course.
Co-Requisite	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	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	The foundational Workday setup record that contains the course's subject, number, instructional formats, grading behaviors, eligibility controls, and relationships to other courses or rules.
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.
Eligibility Rule	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.
External Records (Student's External Records)	Location of external documents received for a student. Examples include test scores and academic transcripts.
Holds	Administrative restrictions placed on a student's account that can prevent actions such as registration, onboarding completion, transcript requests, or account activity until resolved.
Inactive Record	A student record status used when a student has completed their program, withdrawn, been dismissed, or otherwise separated from the institution according to institutional policy.
Learning Outcome	Learning outcomes are used to define the skills that make up a competency.
Match and Merge	A process that helps eliminate duplicate student prospect information in Workday.
Mass Register	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.
Non-Live Registration	A registration that remains on the academic record for historical and transcript purposes but is not actively used in academic progress statistics or requirement completion logic.
Registration Troubleshooting Console	Task in Workday that provides information about why a student could not register for a course or a course section.
Registrations Used	The logic Workday uses to determine which completed registrations count toward academic progress, GPA, credits attempted, and requirement fulfillment.
Section Cluster	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.
Student Activity	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 Engagement	A tailored message or "To Do" that appear in the student's "My Tasks" inbox. Engagements can be sent to specific cohorts (e.g., athletes, advising groups, applicants) to support orientation, registration, and student success.

Student Onboarding	A set of tasks and to-do items students complete upon matriculation and, if institutionally configured, at the beginning of future academic periods. These tasks may include updating personal information, establishing privacy settings, accepting policies, and reviewing financial aid.
Total Academic Requirement	The total number of academic units, credits, or other defined requirements a student must complete to satisfy their program of study.
Verify Participation	The Workday task faculty complete to indicate whether each student in a course section has academically participated during the required verification window. This confirmation supports financial aid, attendance compliance, and institutional reporting requirements.

## Student Financials

Term	Definition
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	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.

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 Workday-generated summary of a student's balance, charges, payments, and account activity by academic period, available in a printable PDF format. Statements are provided to students, while invoices are typically sent to sponsors under Student Sponsor Contracts.
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 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.

## Financial Aid

Anticipated Disbursement Date	The date displayed to students showing when financial aid is expected to disburse, based on institutional disbursement schedules.
Census Date	A financial aid date control used in Workday to determine when certain automated packaging and cost assignment processes shift to manual review workflows. This is not always the same as an institution's traditional reporting census date.
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	The Workday record used to display the enrollment information required to award financial aid and calculate student charges. This may include past, current, and anticipated future enrollment used for packaging, disbursement, and attendance-based processing.
Load Status Policy	The institutional policy that defines the minimum number of academic units or credits required for full-time, half-time, or part-time enrollment statuses used in financial aid, reporting, and academic processes.
Pell Recalculation Date	The financial aid date control used to determine when Workday stops automatically recalculating Pell Grant eligibility based on enrollment changes.
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.