

Workday Glossary

Application

A compact report displayed as an icon on your Home page, providing easy access to tasks and information you use on a regular basis.

Example: Applications include Pay, Personal Information, Benefits, and Expenses.

Approve (business process)

An action in a business process that designated participants select to progress the event to the next step.

Assignable Roles

Positions you can assign to organization roles.

Business Object

Objects used to store data in Workday (such as organizations or workers). A business object has fields and instances, which are analogous to rows and columns in a spreadsheet. Workday links related business objects: a worker is associated with a position, the position to a job profile, and so on.

Example: Purchase order lines are linked to a purchase order header; the purchase order header is linked to a supplier; the supplier is linked to a company, and so on.

Business Process

A business process in Workday includes tasks that you can initiate, act on, and complete in order to accomplish a desired business objective. Business processes are created using a combination of actions, approvals, approval chains, To Dos, or checklists. An action can be a single task or subprocess, which is also a combination of actions, to dos, or checklists. Within the process, conditions can be defined to identify whether a step will be initiated. Notifications can also be created to let a Workday user know that a step has begun or been completed, or that a particular review response was selected.

Examples of business processes include Hire, Change Job, Request Compensation Change, etc.

Business Process Definition

The set of tasks that need to be completed for an event to occur, the order in which they must be done, and who must do them.

Business Process Instance

A business process that the initiator has started.

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Example: The Hire Employee business process definition becomes an instance when the initiator uses it to hire a particular prehire.

Business Process Security Policy

A business process security policy secures the steps and process-wide actions including view, rescind, cancel, and correct. It specifies which security groups have access to each action.

Cancel (business process)

Canceling a business process stops the workflow in progress and reverses changes made to data. You can't cancel a completed business process; you must rescind it.

Contextual Custom Report

A custom report created from the related actions menu of a Workday object by selecting Reporting > Create Custom Report from Here. Simplifies choices of data and fields to those related to the context of the object.

Correct (business process)

An action you can take on a business process. Correcting a business process changes a specification or data in the workflow while in progress. It is also a securable action in a business process security policy.

Custom Report

Reports not delivered by Workday, built to address unique customer needs, using the Workday Report Writer by authorized report writers. These can be created from scratch or by copying another standard or custom report.

Dashboard

A specialized landing page containing a set of pre-configured worklets for a functional area that you can copy or modify.

Data Source

A data source defines a set of business object instances for reporting purposes. Allows reporting access to all business objects related to those in the data source.

Delegation (business process)

An action you can take in a business process if you have been assigned a task. You can request the task be delegated. Requesting a delegation change is a business process that requires approvals.

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Deny (business process)

An action you can take on a step within a business process. If denied, the business process can no longer proceed to the next step. In some cases, the entire business process may be terminated, and all Workday data restored to its state before the business process started. The ability to deny a business process may depend on your system permissions.

Drilldown

A feature to view more data in a matrix report. 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.

Domain

A collection of related securable items such as actions, reports, report data, report data sources, or custom report fields. Each domain is secured by a domain security policy.

Enterprise Interface Builder (EIB)

An integration tool that enables you to import and export Workday data in bulk. Access is limited to specific users.

Event

A business process transaction, such as hiring or a job change.

Field (reporting)

Contains data related to a particular primary or related business object within Report Writer.

Filter

A clickable icon used to narrow down data. Clicking this icon will create a row on your report where you filter data to display from one or more columns.

Functional Area

A collection of domain or business process security policies that are related to the same set of product features, for example, Benefits or Compensation.

Example: Workday HCM includes functional areas such as Benefits, Talent & Performance, Absence, and Manager or Employee self-service. Each of the Workday solutions (like Workday HCM and Workday Financial Management) is grouped into distinct functional areas.

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Home

Your default page containing applications, search, notifications, Inbox, and your profile icon main menu.

Initiation Step

The first step of a business process.

Initiator

The user that initiates the business process instance.

Instance

One unique occurrence of a business object.

Example: Your executive management organization, or Ben Rush, the worker.

Job-based Security Group

A security group that includes one or more job-related attributes or objects, including job profile, job family, job category, management level, or exempt/non-exempt status.

Landing Page

Landing pages display a collection of worklets. Landing pages may have different display formats (grid or bubble) and support different functions. The Home landing page is intended for common worklets, such as self-service worklets.

Location Membership Security Group

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

Matrix Report

A custom report forming the foundation for custom analytics. It summarizes data by one or two fields that contain repeating values. The resulting matrix is displayed as either a table or chart that users can drill through to see the associated details. You control the specific detail data users should see when they drill down by selecting the desired fields when defining the report. Matrix reports also provide features such as filtering, run time prompts, worklets, and report sharing.

Memo Field

Commodity Notes (Add account number or anything else that needs to be handled)

Modify (permission)

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

Reassign Task (business process)

An action you can take on a business process where you can request for a task to be reassigned. This may require further approvals.

Related Business Object

When defining a report, fields that return objects related to the primary business object are said to contain related business objects. These related objects may have their own set of fields that can be included in the report.

Example: You create a report using employee as your business object. To find the total default annual compensation defined for an employee's position, you need to access a related business object off of employee, which would be position.

Rescind (business process)

An action you can take on a business process to completely reverse all changes made to Workday data in a completed business process. A task must be successfully completed to perform this action.

Report Data Sources

Predefined groups of logically related fields, used when creating reports with Report Writer, which define the data in the report row. For example, the Employees report data source contains contact information, personal data, and identification information. Report data sources also include which roles have access to see the report data.

Role-Based Security Group

A security group that specifies one organization role and includes workers in positions defined for that organization role.

Roles

A group of people with specific responsibilities and permissions. When a business process runs, the role for each step includes all of the workers in that role in the business process target organization.

Security Group

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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Standard Report

Reports that Workday creates and delivers to all Workday customers.

Target

The object that a business process operates on.

Example: For business processes that deal with an employee record, the target is the employee. Because the target determines the organization, it controls which business process custom definition Workday uses.

Task

A step, either standalone or in business process, that you must complete. For example, task alert notifications are triggered by steps in a business process.

Example: Notifications or Inbox alerts are triggered by steps in a business process.

To Dos

Reminders to do something outside of the Workday system. They can be part of business processes, and have to be marked complete before the workflow will go to the next step.

View (business process)

A securable item used to allow members to view status of a business process and report on it. A securable item in a business process security policy.

Worklet

A named attribute that you can assign to events and objects to indicate their business purpose.

Worktag

A named attribute that are assigned to events and objects to indicate their business purpose.