

Workday Terminology

Not all terminology will apply to every employee.

Applications - applications in workday give you options for how to navigate to task and information you need. To add an app to your workday account, select **menu** in the top left and then select **Add Apps** in the bottom left.



Benefits: An application linking you to common actions and views related to benefits, including change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.



Career: An application linking you to common actions and views related to your career, including refer candidates and view your certifications, education, languages, job history, and awards.



Compensation: An application linking you to common actions and views related to compensation including comparing a direct report's pay and salary range to others on the team. Use this application to request one-time payments, stock grants, and compensation changes for your team, and to view their compensation history.



Dashboards: An application containing key management reports and actions.



Directory: An application linking you to common actions and views related to your organization's directory. You can view a list of your coworkers and gather information about other workers in the company, including their work addresses and phone numbers. You can also view your organizational chart, your management chain, and organizations to which you belong.



Expenses: An application linking you to common actions and views related to expenses, including creating and editing expense reports and viewing expense policies, reports, transactions, payment elections, and recent expenses.



My Team: An application linking you to common actions and views related to your team including viewing your direct reports and their employment information. Transfer, promote, or change the job of a direct report.

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Pay: An application linking you to common actions and views related to your pay. You can use this application to access withholding elections and payment elections and to view pay slips, total compensation, bonus and one-time payment history, tax documents, and allowance.



Performance: An application linking you to common actions and views related to performance, including viewing goals, reviews, feedback received, and skills.



Personal Information: An application linking you to common actions and views related to your personal information, including changing your contact and personal information (such as addresses, email, and phone numbers), emergency contacts, photo, legal name, preferred name, and government IDs.



Recruiting: An application linking you to common recruiting actions and views, and a list of recent requisitions. Depending on your role, you can find candidates, invite candidates to apply, create a job application on behalf of an individual, open your job requisitions, search for requisitions by their status, or search all requisitions by name and search for referrals.



Spend Management: An application linking you to common actions and views related to spend management, including viewing your team's total spending and its details and viewing team members' expense reports.



Talent: An application linking you to common actions and views related to talent, including managing a succession plan, assessing potential, and giving and getting feedback, and viewing a talent snapshot.



Team Time Off: An application linking you to common actions and views related to your team's time off, including managing your direct report's time off requests, correcting time off requests, and placing employees on leave.



Time: An application linking you to common actions and views related to your time, including entering your time and viewing your time off balance.

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Time Off: An application linking you to common actions and views related to time off, including time off correction, leave of absence, view your time off, and time off balance.



Learning: An application linking you to courses that you can enroll in, such as learn in person or on-demand courses.

Main Menu



Inbox: Displays a badge count for your incomplete action items and takes you to your Inbox.



Notifications: Displays a badge count for your unread notifications and takes you to your Notifications page.

Q Search

Search: A field on the home page that enables you to find tasks, reports, and people within your organization. Search allows you to narrow results by categories including common, organizations, and all of Workday. Search also allows you to filter results by specified criteria. For example, if you select the Find Jobs task, you can sort results by organization, location, worker type, etc.

≡ MENU

Global Navigation: Displays on every Workday page in the top left and allows you to access your Workday applications.



Home: Displays the Workday-delivered Home landing page, or the Preferred Home Page if you select one on the Change Preferences task.

Task Page Icons



Related Actions: 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.



Edit: A clickable icon that enables the user to add and remove information on the page.

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More



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



Calendar: A clickable icon that opens a calendar to select a date.



Change Selection: A clickable icon that allows you to change a selection from a task without losing any prior progress.



Chart: A clickable icon used to view a report as a chart.



Comments: A clickable icon you can use to leave comments for yourself or other users for a particular page or task.



Configure Applications: A clickable icon on the home page where you can configure the applications that appear on your home page. Depending on your organization's configuration, some applications may be required, while others are optional. This icon can also be used as a Settings icon.



Excel: A clickable icon used to view a page as an Excel file. This can be restricted using the domain Export to PDF and Excel.



PDF: A clickable icon used to view a page as a printable PDF file. This can be restricted using the domain, Export to PDF and Excel.



Prompt: A clickable icon that presents a list of options for a specific field.



View Team: A clickable icon that links directly to an organized chart of your team and organization. Can be accessed from the Worker Profile.

Terminology

- **Active Candidate:** A person with an application for a specific job requisition. Candidates must be linked to a job requisition for Workday to initiate a job application event.
- **Benefit Event:** An event that gives you the opportunity to change your benefit elections. These include staffing changes (such as getting hired or promoted) and life events (such as getting married or having a child).

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- **Business Process:** A business process in Workday includes tasks that you can initiate, act on, and complete 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, Terminate Employee, etc.
- **Contingent Worker:** A worker who is not an employee. You can use contingent worker types, such as contractor or consultant, to categorize and track contingent workers in your organization.
- **Direct Deposit:** A payment election. You can choose direct deposit as a payment type. If this is elected, any payment from the company will go directly to the bank account specified. You can set up your direct deposit to include several accounts and specify the percentage of payment that you would like to go into each account.
- **Open Enrollment:** A type of enrollment event. This event controls the benefits open enrollment process. Unlike benefit event enrollment, which is triggered by a life event or job change, an open enrollment event applies to an entire employee population.
- **Payment Elections:** Designates the payment type (check or direct deposit), account information for direct deposits, payment order, and the distribution of balance for split payments. Controlled for each type of pay that you receive, such as regular payments and bonus payments.
- **Pre-Hire:** In staffing, an individual you are tracking before employment. In recruiting, a candidate who is in the offer or background check stage.
- **Supervisory organizations:** group workers into a management hierarchy and are the primary organization type in Workday HCM. All workers are hired into supervisory organizations. Organization assignments such as company, cost center, and region can be configured for supervisory organizations, and unique business processes can be configured for them as well.
- **Time Sheets:** Record work hours for submission, approval, and eventual payment through payroll, if enabled. (Often this is enabled via the Time Tracking application instead of Payroll.)