# Workday Transaction Terminology

## Glossary of Workday terms

- ### 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.

  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.

- ### 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 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. Workday includes a number of pre-defined business processes for different purposes. You can edit the default definitions for your organization. You can also create different versions of the same business process for different organizations.

- ### Business Process Instance

  A business process that the initiator has started.

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

- ### 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. A securable action in a business process security policy.

- ### 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. and fields to those related to the context of the object.

- **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.

- **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.

- **Dashboard**

  A specialized landing page containing a set of pre-configured worklets for a functional area that you can copy or modify. You can add additional custom worklets to dashboards using the report writer.

- **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 may require approvals and may or may not be included in your organization's configuration.

- **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. If the Enable Drilldown to Detail Data checkbox is selected on the Advanced tab of the report definition, you can also select details associated with the selected report element.

- **Event**

  A business process transaction that occurs within your organization, such as hiring or terminating an employee.

- **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.
- **Full Time Equivalent (FTE) %**

  The ration of a worker's scheduled weekly horus to the weekly hours for the business site.  If a worker works 20 hours a week, and the business site weekly hours are 40, then the worker's FTE is 50%.
- **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 a business process instance.
- **Instance**

  One unique occurrence of a business object.

  *Example:* Your executive management organization, or John Doe, the worker.
- **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.
- **Modify (permission)**

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

- ### Pre-Hire

In staffing, an individual you are tracking before employment.  In recruiting, a candidate who is in the offer or background check stage.

- ### 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.

- ### Retro Pay

Is the action of adding compensation to an employee’s earnings to cournteract a mistake on a previous pay stub.

- ### 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.

- ### 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.

- ### Target

The object that a business process operates on.

- ### 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.
- **Worker**

  An employee or a contingent worker.
- **Worker Profile**

  Your continuously updated page. It provides a quick view of your experience, skills, education, and projects.
- **Worktag**

  A named attribute that you can assign to events and objects to indicate their business purpose. For example, you can create a Customer worktag, whose values are the names of your customers. You can use the worktag to assign a customer to an expense in an expense report or a product sales event.