HCMWI glossary

HCMWI Glossary includes Workday terms and PeopleSoft crosswalks. The HCMWI Glossary includes all terms, while functional area-specific glossaries are listed below.

Table of contents

HCMWI glossary

Term	Definition
Absence Calendar	Allows workers to submit absence requests — which then follow a path for approval — and provides a view of a worker's use of various absence plans — vacation, sick time, leaves of absence, etc.
Academic Appointment	An academic appointment tracks an academic appointee's time at a university or college. Appointments record an appointee's relationship to an Academic Unit over a period of time on a particular academic track. There is no direct relationship to employment, but you can optionally associate an appointment to a filled position.
Academic Pay Accrued	Captures the salary accrued during the academic period.

Academic Pay Earned	Captures the salary earned by the employee during the academic period.
Academic Unit	A type of organization that can represent campuses, colleges and departments.
Accrual	Defines how much time off employees can accrue, the timing of the accrual and other rules. Can define eligibility rules, a frequency and limits that differ from the time off plan.
Academic Affiliate	An academic affiliate works at the university but isn't an employee. These affiliates are typically visiting professors, scholars and courtesy faculty, such as clinical/affiliate or other academic personnel. In Workday, academic affiliates only exist in the context of academic appointments. They hold appointments in academic units but are unpaid and don't have positions or supervisory organization assignments.
Allowance Plan	A flat monetary amount or percentage paid for a specific use — e.g., mobile phone allowance or home office allowance.
Application	Icons on the Workday navigation menu that provide access to groups of related tasks. Used to organize tasks and reports by functional areas.
Approve	An action performed by participants in a business process, with a defined responsibility in this type of event that indicates they approve the proposed action. After approval, the business process proceeds to the next step.
Assignable Roles	You can assign positions to organization roles. Depending on your staffing model, a position may or may not necessarily have a worker specified.
Benefit Event	An event in the employee's life that allows the employee to change benefit elections. These include staffing changes. Example: Getting hired or promoted. Also, life events such as getting married or having a new child.

Benefit Group	Identifies workers who qualify for similar benefit plans and elections. Workday builds benefit groups dynamically based on eligibility rules that control group membership. All workers who meet the criteria specified in a group's eligibility rules are automatically assigned to that group. Example: You can create benefit groups by defining eligibility rules that assign executive management staff to one group, salaried employees to another group and hourly employees to a third group.
Benefit Plan	Defines the following: The coverage levels or amounts available to employees enrolling in an insurance, health care, defined contribution or spending account plan. The target populations for a plan — e.g., employee, employee + spouse or employee + children. Eligibility for benefits, including which benefit groups are eligible for the plan. Restrictions on the age of covered dependents. Plan rates and costs.
Business Process, BP	A business process is a sequence of one or more tasks that accomplish a desired business objective. Examples of business processes are hiring an employee or paying an invoice.
Business Process Definition	The set of configured steps for an event to occur. Includes condition rules, the sequence of steps and security for a business process.
Business Process Security Policies	A business process security policy secures the initiation step, actions and process-wide actions, including view, rescind, cancel and correct. It specifies which security groups have access to each action.
Cancel — A step type of business process.	Will stop the business process workflow and reverse changes made to data. You cannot cancel a completed business process; you must rescind it.

Candidates	When prospects are linked to a job requisition.
Carryover Limit	The maximum time off employees can carry over from one balance period to another.
Cascading Leave	A sequence of related leave types that are linked together. When an employee meets the conditions for ending a leave, Workday generates a return from leave request and a separate request for the next leave.
Change Specialist	Works closely with readiness coordinators and a broader change network. Disseminates information and project asks, supports network and reports resistance to the OCM team.
Change Network	Comprised of Readiness Coordinators, Primary HR Stakeholders and the OCM Team; responsible for supporting change efforts for the project.
Company	A type of organization in Workday that represents a legal entity.
Compensation Package	A grouping of compensation guidelines — grades, grade profiles and their associated steps — and plans that you can assign to workers as a set. Compensation packages provide a quick view of the eligible plans for a particular job or group of employees.
Compensation Plan	A component of pay that is used to assign monetary amounts to a worker's pay. Example: A salary or an allowance. Some compensation plans are discretionary — e.g., a commission — and you are not paid from these compensation plans in every paycheck. Other plans, such as a salary plan, are included in every paycheck.
Compensation Waiting Period	A rule that defines when employees become eligible for a merit plan. You base the rule on a single value, such as a hire date.

Contingent Worker	Contingent Workers consist of individuals performing work for the university but are not paid by ASU.
Correct — A step type of business process.	Change the specification or data in the business process workflow while it is in progress. It is also a securable action in a business process security policy.
Cost Center	A cost center is an organization that tracks financial and human resources transactions with a financial impact, such as hiring or terminations. Employees are assigned a cost center when hired.
Country Region	Political entities — such as states, provinces, cities or other legislative entities — where specific laws and regulations require companies to track and report on unique kinds of worker and job information.
Coverage Target	Defines whether a specific health care plan or insurance plan can be used by only the employee or the employee's dependents, entire family, spouse and so on.
Custom Report	Custom reports are designed and built by ASU using the Workday Report Writer. They can be created new or as a copy of another standard or custom report.
Customer Confirmation Session, CCS	CCS is part of the formal Workday methodology where the customer functional teams present the Workday design to a group of stakeholders outside the core project team. While the future state design is not fully developed or tested, it is an opportunity to validate project decisions and assist in configuration finalization. CCS is akin to FSPD playback sessions; they are **not** design workshops or training sessions.
Dashboard landing pages	Several dashboards are available with pre-configured worklets specific to a functional area, like Talent Management or Workforce Planning. Users can launch common tasks and business processes from these dashboard landing pages.

Defined contribution plans	A type of benefit plan where employees contribute to 401k and 403b accounts.
Delegate — A step type of business process.	When an employee assigns a business process task to another person to complete on their behalf, delegation only temporarily reassigns ownership of the business process task.
Deny — A step type of business process.	Designated participants in a business process can deny the proposed action, preventing the process from proceeding to the next step. Sometimes, the entire business process may be terminated, and all Workday data is restored to its state before the business process starts.
Dispositioned	Status of candidates that have been rejected for hire or declined a job.
Drilldown	Matrix reports 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.
Driver Worktag	A worktag that, when selected during a financial transaction, auto-populates related worktags with it onto the transaction. Examples of driver worktag types include grant, gift and project.
Check-ins	EDGE Conversations, PeopleSoft.
Eligibility Rule	Specify one or more criteria that categorize workers into a group that is used to qualify them for participation in an HR-related task.
Employee type	Designation is assigned to each employee when the individual is hired — e.g., staff, student, faculty.

Enrollment Event	Any event that results in a gain or loss of benefits coverage. This encompasses open enrollment and benefit events, such as a new hire, a termination, the birth of a child and a job change.
Event (or business process event)	An instance of a business process transaction within your organization, such as hiring or terminating an employee.
Endorsements	External candidates can request referrals, and current employees can endorse them by responding to referrals — they can also decline. Endorsements are canceled if the candidate is hired or dispositioned or if the job requisition is closed.
Field (reporting)	In a Report Writer report, a field contains data related to a particular primary or related business object.
Forward Accrual	Estimates payroll payments to be made in a future payroll period that spans two financial reporting periods.
Frequency	Used in compensation and payroll to help calculate worker compensation and pay.
Full Time Equivalent (FTE) %	The ratio of a worker's scheduled weekly hours to the business site's weekly hours. For a worker who tracks time and works 20 hours a week and the business site's weekly hours are 40, the worker's FTE is 50%.
Filter	Sorts out undesired data in reports.
Fringe Actuals	Employer portion distributed over 12 months and charged to the fringe pool worktags.
Fringe Benefit Expenses	Applicable to Actuals and/or Commitments and Obligations.
Fringe Expense	The total annual expense charged in full over the Academic Period. Calculated by CFBR.
Fringe Payable	The amount associated with the employer portion of fringe due to vendors.
Functional Area	A functional area is a collection of business processes or domain security policies related to the same product features.

	Examples: Benefits or Compensation.
Future State Process Design (FSPD)	FSPDs are a series of workshop sessions, depending on the complexity of the process, to review leading practice process designs and apply feedback based on the process improvement needs of ASU.
Health Time	Sick Time in PeopleSoft will now be Health Time in Workday.
Primary Recruiter	Hiring manager, PeopleSoft.
Hiring or position restrictions	Hiring restrictions define rules and conditions for holding jobs and positions in a position management or job management organization, such as defining required qualifications, experience and skill levels of workers or restricting the business sites where a job can be filled.
Home, address	Regular address — likely a domestic address — for an employee.
Host, address	Used to track employees assigned to another position in addition to their home position — likely international address.
Human Capital Management, HCM	A set of practices related to people resource management. These practices focus on the organizational need to provide specific competencies and are implemented in three categories: workforce acquisition, management and optimization.
Individual target	Either an individual target assigned to a worker in worker compensation — different from the plan target — or the target for each employee calculated by Workday during the bonus or merit process, based on configuration options.
Initiator or initiation step	An initiation step is the first step of a business process, and an initiator is the user who starts the business process event.
Instance	An instance refers to one unique occurrence of a business object.

HCM Workday Innovation

	Example: Your Executive Management organization or John Doe, the worker.
Integration	Creating a data feed to or from Workday into another system.
Intermittent leave	A single leave of absence taken as separate blocks of time. To facilitate tracking, you can coordinate time offs with leaves of absence. Validation rules and supporting data for coordinated leaves and time offs can reference combined balances. Example: Eligibility and validation rules can check to see if an employee has a sufficient balance across coordinated leave types and time offs to take all days in a leave of absence or time off request.
Job Catalog	The collection of user-defined job family groups, which each contain job families, which each contain job families, available for use in hiring and other staffing transactions.
Job Category	User-defined job categories allow you to track additional job information and are attached to a job profile. You can define any job category that fits your business. Example: Whether specific workers, jobs or positions are "Direct Labor" or "Indirect Labor." The job category is displayed on the position — based on that position's job profile job category — which facilitates reporting at the position level.
Job Classification, group	Job classifications are required for job-related regulatory reporting and can be used to categorize job profiles. A job classification group is how you group and maintain individual job classifications.
Job family	A grouping of job profiles. Can belong to one and only one job family group — a grouping of similar job profiles.
Job level, hierarchy	Categorizes job profiles based on compensable factors such as the level of education, experience or training required to perform a job. Job profiles are assigned job levels, and those job levels are organized into a hierarchy.

Job management staffing model	Workday supports one of two staffing models — job and position management. The job management staffing model provides the least control over the definition of individual positions: the hiring restrictions you define apply to all jobs in the supervisory organization, and you can define only one set of hiring restrictions for the entire supervisory organization.

In addition, with job management, you do not set specific limits on the number of jobs that can be filled. |
| **Job profile** | Defines generic features and characteristics — such as company insider type, pay rate type, competencies and proficiencies — of a job and a position that uses that profile. The more specifically defined a job profile is, the more defined those jobs and positions will be by default.

Job profiles are the most specific element in the job catalog: job profiles make up job families, which make up job family groups. |
| **Landing page** | A landing page displays a collection of different worklets, enabling you to view data and perform tasks quickly. There are different landing pages and display formats — grid or wheel — to support different functions. Some common landing pages are My Workday, My Workday 2.0, All About Me and My Team. There are other specialized landing pages, such as dashboard landing pages. |
| **Leave of Absence** | The return to work date is not always known — estimate. The request is based on a range of dates, including the first day of leave and expected return date, which cause a status change — "On Leave" depending on configuration — that is typically longer, and the worker must be returned after.

Examples: Family and Medical Leave, Maternity Leave, Sabbatical. |
| **Life Event** | A kind of benefit event that occurs in the employee's personal life.

Example: Getting married or having a child. |

Location	A type of organization that represents a worker's or business asset's physical location.
Manual Payment	An off-cycle calculation that records check or cash payments made outside Workday Payroll.
Matrix Report	You can create three types of custom reports: simple, advanced and matrix. A matrix report forms the foundation for custom analytics. It summarizes data by one or two fields that contain repeating values. The resulting matrix is displayed as a table or chart that users can drill through to see the details. Matrix reports also provide features like filtering, run-time prompts, worklets and report sharing.
Merit Process	A sequence of one or more tasks related to defining, targeting and awarding merit pay to employees.
Manager Self-Service (MSS)	This functionality allows managers to view their team, review notifications and initiate certain tasks.
Nonactive Worker	A worker with a Terminated or On Leave status for payroll processing purposes. A run category can define rules for processing nonactive workers.
Off-Cycle Payment	Payment made outside the regularly scheduled payroll run. Examples: Manual, On-Demand, Reversals and History Payments An unscheduled payroll run, such as manual, on-demand or reversal. Enables you to issue additional or replacement payments.
Ok	Action in Workday to acknowledge what is on the screen. Pressing OK does not trigger an action.
On-Cycle Payment	Payment made in a scheduled payroll run.
On-Demand Payment	An off-cycle payment that replaces — or is issued in addition to — a worker's on-cycle pay.

Open Enrollment Event	A type of enrollment event; the other is a benefit event. This event controls the benefits of the open enrollment process. Unlike benefit event enrollment, triggered by an event in a specific employee's life or work, an open enrollment event applies to an entire, chosen employee population.
Organization	An organization groups workers, resources, costs and other organizations together for various business reasons. Organizations provide management, visibility into and reporting — roll-up — structures for resource allocation. They can also define cost centers and geographic or regional reporting structures. Examples: Supervisory, company, cost center, academic unit.
Passive Event	Events that result from the passage of time rather than from a specific change to employee data. Example: You can set up a passive event to track and manage benefit eligibility for employees aged 65 — retirement age. Based on the event rules, Workday automatically searches for employees turning 65 and generates an enrollment event to record any benefit gains or losses.
Pay Component	An earning — such as base salary or bonus — or deduction — such as federal withholding taxes or medical — that applies to a worker's gross-to-net pay calculation or tax liability.
Payslip	Paycheck, PeopleSoft.
Pay Group	A group of workers defined as having their pay calculated and processed together. Workers in a pay group must share the same period schedule.
Pay Rate Type	Defines whether the worker is paid a salary or a certain amount per unit of time.

	Example: Hourly or weekly. Defined by country and associated with job profiles and, by extension, with employees in that job profile.
Payroll Actuals	Salaries and Wages, Employee Deductions, Net Pay and Employer Paid Expenses, Fringe Benefit Expenses.
Payroll Commitments and Obligations	Equivalent to Pre-Encumbrances and Encumbrances. Salaries and Wages, Fringe Benefit Expenses.
Position	A position is a chair within a supervisory organization that consolidates key job information, such as job family, job profile, worker type, location, full-time vs. part-time, etc.
Position Management Staffing Model	One of two staffing models (job management and position management) supported by Workday. This staffing model provides the tightest control over hiring, as you can specify different staffing rules and restrictions for each position in the supervisory organization. In the Position Management model, workers must be hired into defined positions, which remain if a worker leaves the university. There is one worker to one position in this staffing model. Unlike job management, where a position disappears when the worker leaves, you can report on unfilled positions in a position management supervisory organization.
Position Requirements	Used in job requisitions to define rules and conditions for holding positions in a supervisory organization using position management as its staffing model. Position requirements enable you to: ● Define the required qualifications, experience and skill levels of workers hired into a position. ● Limit staffing to specific job families and job profiles. ● Limit staffing for a position to a specific worker type — employees or contingent workers.

	- Limit staffing for a position to a specific time type — full or part-time workers. - Restrict the business sites where a position can be filled.
Pre-hires	Status before becoming an employee — before hire/contract. Used to identify individuals you are tracking before employment or to identify candidates who are in the "offer" or "background check" stage.
Project	An undertaking that encompasses a set of tasks or activities having a definable starting point and well-defined objectives. Usually, each task has a planned completion data — due date — and assigned resources.
Prompt (reporting)	A Report Writer report can be defined to prompt the user for filtering criteria when they run the report. Report prompts can also be built into a data source.
Prospects	Potential applications, pre-application.
Readiness Coordinator	Functional subject matter experts — SMEs — who act as part of the communication cascade for information distribution and gathering.
Readiness Workshops	Educational, foundational sessions on how business processes are conducted in Workday. Serve to prepare Readiness Coordinators to communicate with their units and socialize changes.
Related Worktags	A group of worktags that auto-populate onto a financial transaction when a driver worktag is selected on the transaction. Sometimes called additional worktags.
Rescind (step type of business process)	Rescinding a business process operates on completed business processes. It completely reverses all changes made to Workday data. It is also a securable action in a business process security policy.
Role-Based Security Group	A role-based security group specifies one organization role and includes workers in job positions defined for that organization role. Workers assigned roles in a role-based

	security group can initiate and/or approve business processes defined for that role. Example: Only the Compensation Partner role-based security group can approve compensation in a new hire business process.
Security Groups	Group of specific users or roles with permissions to view information or initiate, review or approve business processes and their contained items.
Staffing Event	Any event that changes an employee's position or job. Example: A hire, transfer or promotion. Staffing events usually trigger an opportunity to change benefits elections.
Submit	Action in Workday that triggers a task.
Succession Plan	Track candidates for a specific position.
Succession Pool	Track candidates for one or more job profiles.
Supervisory Organization	Supervisory organizations — "sup org" — are the foundation of Workday HCM. This type of organization groups employees into a management hierarchy. A sup org can be a business unit, department, group or project. Jobs, positions and compensation structures are associated with sup orgs, and workers are hired into jobs or positions associated with a sup org.
Supplemental Earning	Any compensation paid in addition to an employee's regular wages that includes, but is not limited to, severance or dismissal pay, vacation pay, back pay, bonuses, moving expenses, overtime, taxable fringe benefits and commissions. In Workday, only supplemental earnings can be grossed up.
Target (Business Process)	The subject of a business process event, like a worker or an expense report.
Task	A step — either in a business or standalone process — assigned to you to complete.

	Example: Initiating an offer to a candidate, approving an employee's expense, completing a training course.
Tenant	A tenant is a Workday server environment with specific functionality for the project — e.g., configuration, test, training, etc. ASU will initiate business processes and execute tasks in a production tenant at go-live.
Termination	Termination in Workday occurs when the active working relationship between the UW and the employee ends, whether voluntary or involuntary.
Time Off	The expected return date is typically known upfront. The request is based on each day the employee is expected to be off work. They do not cause a status change, are typically shorter and the worker does not need to be returned after. Examples: Sick Time, Vacation Time, Floating Holiday, Bereavement.
To Do	To-Dos are reminders to do something outside of the Workday system. They can be part of business processes and must be marked complete before the workflow goes to the next step.
True Up	To pay the outstanding balance for one or more bonus plans to meet the bonus target.
User-Based Security Group	A user-based security group grants workers, not positions, as members. When a worker is assigned to a user-based security group, they maintain access to it regardless of whether they remain in their position.
Validation Rules	Rules that prevent the entry of invalid data. Validation rules trigger an error or warning message when invalid data is entered. Example: A validation rule can prevent the entry of unpaid time off or requests of less than four hours. A validation rule for a leave of absence can ensure that an employee does not exceed the maximum number of leave days allowed each year.

Workday Ecosystem	An interconnected system that includes customers, integration partners and internal Workday employees.
Workday Journeys	Enables organizations to build tailored, concierge-style employee experiences via journey paths and custom card insights.
Worker	A person is either an employee hired by a company or a contingent worker contracted by a company.
Worker Type	Employee or Contingent Worker. There can also be several user-defined types of contingent workers. Compensation, benefits and staffing events are tied to the worker type.
Worktags	Assignable attributes provide additional context to business events and transactions that indicate their business purpose. As the name implies, they "tag" transactions. Worktags classify transactions for financial, operational and external reporting. They can be assigned to any business event that generates a financial update, such as a purchase requisition, expense report, time entry, journal entry, payroll transaction, etc. Some will be required; others will be optional.

Workday basics

Term	Definition
Application	Icons on the Workday navigation menu that provides access to groups of related tasks. Used to organize tasks and reports by functional areas.
Approve	An action performed by participants in a business process, with a defined responsibility in this type of event that indicates they approve the proposed action. After approval, the business process proceeds to the next step.
Assignable Roles	You can assign positions to organization roles. Depending on your staffing model, a position may or may not necessarily have a worker specified.
Business Process (BP)	A business process is a sequence of one or more tasks that accomplish a desired business objective. Examples of business processes are hiring an employee or paying an invoice.
Business Process Definition	The set of configured steps for an event to occur. Includes condition rules, the sequence of steps and security for a business process.
Business Process Security Policies	A business process security policy secures the initiation step, step actions and process-wide actions, including view, rescind, cancel and correct. It specifies which security groups have access to each action.
Cancel (step type of business process)	Will stop the business process workflow and reverse changes made to data. You cannot cancel a completed business process; you must rescind it.
Company	A type of organization in Workday that represents a legal entity.
Correct (step type of business process)	Change the specification or data in the business process workflow while it is in progress. It is also a securable action in a business process security policy.

Cost Center	A cost center is an organization that tracks financial and human resources transactions with a financial impact, such as hiring or terminations. Employees are assigned a cost center when hired.
Country Region	Political entities — such as states, provinces, cities or other legislative entities — where specific laws and regulations require companies to track and report on unique kinds of worker and job information.
Dashboard Landing Pages	Several dashboards are available with pre-configured worklets specific to a functional area, like Talent Management or Workforce Planning. Users can launch common tasks and business processes from these dashboard landing pages.
Delegate (step type of business process)	When an employee assigns a business process task to another person to complete on their behalf; delegation only temporarily reassigns ownership of the business process task.
Deny (step type of business process)	Designated participants in a business process can deny the proposed action, preventing the business process from proceeding to the next step. Sometimes, the entire business process may be terminated, and all Workday data is restored to its state before the business process starts.
Driver Worktag	A worktag that, when selected during a financial transaction, auto-populates related worktags with it onto the transaction. Examples of driver worktag types include grant, gift and project.
Eligibility Rule	Specify one or more criteria that categorize workers into a group that is used to qualify them for participation in an HR-related task.
Employee type	Designation is assigned to each employee when the individual is hired — e.g., staff, student, faculty.

Event (or business process event)	An instance of a business process or transaction within your organization, such as hiring or terminating an employee.
Full Time Equivalent (FTE) %	The ratio of a worker's scheduled weekly hours to the business site's weekly hours. For a worker who tracks time and works 20 hours a week and the business site's weekly hours are 40, then the worker's FTE is 50%
Home (Address)	Regular address — likely a domestic address — for an employee.
Host (Address)	Used to track employees assigned to another position in addition to their home position — likely international address.
Initiator/Initiation Step	An initiation step is the first step of a business process, and an initiator is the user who starts the business process event.
Instance	An instance refers to one unique occurrence of a business object. Example: Your Executive Management organization or John Doe, the worker.
Integration	Creating a data feed to or from Workday into another system.
Landing Page	A landing page displays a collection of different worklets, enabling you to view data and perform tasks quickly. There are different landing pages and display formats — grid or wheel — to support different functions. Some common landing pages are My Workday, My Workday 2.0, All About Me and My Team. There are other specialized landing pages, such as dashboard landing pages.
Location	A type of organization that represents a worker's or business asset's physical location.

Nonactive Worker	A worker with a Terminated or On Leave status for payroll processing purposes. A run category can define rules for processing nonactive workers.
Ok	Action in Workday to acknowledge what is on the screen. Pressing OK does not trigger an action.
Organization	An organization groups workers, resources, costs and other organizations together for various business reasons. Organizations provide management, visibility into and reporting — roll-up — structures for resource allocation. They can also define cost centers and geographic or regional reporting structures. Examples: Supervisory, company, cost center, academic unit.
Project	An undertaking that encompasses a set of tasks or activities having a definable starting point and well-defined objectives. Usually, each task has a planned completion data — due date — and assigned resources.
Related Worktags	A group of worktags that auto-populate onto a financial transaction when a driver worktag is selected on the transaction. Sometimes called additional worktags.
Rescind (step type of business process)	Rescinding a business process operates on completed business processes. It completely reverses all changes made to Workday data. It is also a securable action in a business process security policy.
Submit	Action in Workday that triggers a task.
Supervisory Organization	Supervisory organizations — "sup org" — are the foundation of Workday HCM. This type of organization groups employees into a management hierarchy. A sup org can be a business unit, department, group or project. Jobs, positions and compensation structures are associated with sup orgs, and workers are hired into jobs or positions associated with sup orgs.

Target (Business Process)	The subject of a business process event, like a worker or an expense report.
Task	A step — either in a business or standalone process — assigned to you to complete. Example: Initiating an offer to a candidate, approving an employee's expense, completing a training course.
Tenant	A tenant is a Workday server environment with specific functionality for the project — e.g., configuration, test, training, etc. ASU will initiate business processes and execute tasks in a production tenant at go-live.
To Do	To-Dos are reminders to do something outside of the Workday system. They can be part of business processes and must be marked complete before the workflow goes to the next step.
Workday Ecosystem	An interconnected system that includes customers, integration partners and internal Workday employees.
Workday Journeys	Enables organizations to build tailored, concierge-style employee experiences via journey paths and custom card insights.
Worker	A person is either an employee hired by a company or a contingent worker contracted by a company.
Worker Type	Employee or Contingent Worker. There can also be several user-defined types of contingent workers. Compensation, benefits and staffing events are tied to the worker type.

Project-specific

Term	Definition
Change Specialist	Works closely with readiness coordinators and a broader change network. Disseminates information and project asks, supports network and reports resistance to the OCM team.

Change Network	Comprised of Readiness Coordinators, Primary HR Stakeholders and the OCM Team; responsible for supporting change efforts for the project.
Customer Confirmation Session (CCS)	CCS is part of the formal Workday methodology where the customer functional teams present the Workday design to a group of stakeholders outside the core project team. While the future state design is not fully developed or tested, it is an opportunity to validate project decisions and assist in configuration finalization. CCS is akin to FSPD playback sessions; they are *not* design workshops or training sessions.
Functional Area	A functional area is a collection of business processes or domain security policies related to the same product features. Examples: Benefits or Compensation.
Future State Process Design (FSPD)	FSPDs are a series of workshop sessions, depending on the complexity of the process, to review leading practice process designs and apply feedback based on the process improvement needs of ASU.
Human Capital Management (HCM)	A set of practices related to people resource management. These practices focus on the organizational need to provide specific competencies and are implemented in three categories: workforce acquisition, management and optimization.
Readiness Coordinator	Functional subject matter experts — SMEs — are part of the communication cascade for information distribution and gathering.
Readiness Workshops	Educational, foundational sessions on how business processes are conducted in Workday. Serve to prepare Readiness Coordinators to communicate with their units and socialize changes.
Validation Rules	Rules that prevent the entry of invalid data. Validation rules trigger an error or warning message when invalid data is entered.

	Example: A validation rule can prevent the entry of unpaid time off or requests of less than 4 hours. A validation rule for a leave of absence can ensure that an employee does not exceed the maximum number of leave days allowed each year.
Worktags	Assignable attributes provide additional context to business events and transactions that indicate their business purpose. As the name implies, they "tag" transactions. Worktags classify transactions for financial, operational and external reporting. They can be assigned to any business event that generates a financial update, such as a purchase requisition, expense report, time entry, journal entry, payroll transaction, etc. Some will be required and others will be optional.

PeopleSoft to Workday

Term	Definition
Check-ins	EDGE Conversations — PeopleSoft.
Primary Recruiter	Hiring manager — PeopleSoft.
Payslip	Pay check — PeopleSoft.
Contingent Worker	Person of Interest — PeopleSoft.
Health Time	Sick Time in PeopleSoft will now be Health Time in Workday.

Academics

Term	Definition

Academic Affiliate	An academic affiliate works at the university but isn't an employee. These affiliates are typically visiting professors, scholars and courtesy faculty, such as clinical/affiliate or other academic personnel. In Workday, academic affiliates only exist in the context of academic appointments. They hold appointments in academic units but are unpaid and don't have positions or supervisory organization assignments.
Academic Appointment	An academic appointment tracks an academic appointee's time at a university or college. Appointments record an appointee's relationship to an Academic Unit over a period of time on a particular academic track. There is no direct relationship to employment, but you can optionally associate an appointment to a filled position.
Academic Pay Accrued	Captures the salary accrued during the academic period.
Academic Pay Earned	Captures the salary earned by the employee during the academic period.
Academic Unit	A type of organization that can represent campuses, colleges and departments.

Benefits

Term	Definition
Benefit Event	An event in the employee's life that allows the employee to change benefit elections. These include staffing changes. Example: Getting hired or promoted. Also, life events such as getting married or having a new child.
Benefit Group	Identifies workers who qualify for similar benefit plans and elections. Workday builds benefit groups dynamically based on eligibility rules that control

| | group membership. All workers who meet the criteria specified in a group's eligibility rules are automatically assigned to that group.

Example: You can create benefit groups by defining eligibility rules that assign executive management staff to one group, salaried employees to another group and hourly employees to a third group. |
|---|---|
| **Benefit Plan** | Defines the following:

The coverage levels or amounts available to employees enrolling in an insurance, health care, defined contribution or spending account plan.
The target populations for a plan.

Example: Employee, employee + spouse or employee + children.

Eligibility for benefits, including which benefit groups are eligible for the plan — restrictions on the age of covered dependents.

Plan rates and costs. |
Coverage Target	Defines whether a specific health care plan or insurance plan can be used by only the employee or the employee's dependents, entire family, spouse, etc.
Defined Contribution Plans	A type of benefit plan where employees contribute to 401k and 403b accounts.
Enrollment Event	Any event that results in a gain or loss of benefits coverage. This encompasses open enrollment and benefit events, such as a new hire, a termination, the birth of a child and a job change.
Life Event	A kind of benefit event that occurs in the employee's personal life.

Example: Getting married or having a child. |
| **Open Enrollment Event** | A type of enrollment event; the other is a benefit event. This event controls the benefits of the open |

	enrollment process. Unlike benefit event enrollment, triggered by an event in a specific employee's life or work, an open enrollment event applies to an entire, chosen employee population.
Passive Event	Events that result from the passage of time rather than from a specific change to employee data. Example: You can set up a passive event to track and manage benefit eligibility for employees aged 65 — retirement age. Based on the event rules, Workday automatically searches for employees turning 65 and generates an enrollment event to record any benefit gains or losses.

Compensation

Term	Definition
Allowance Plan	A flat monetary amount or percentage is paid for a specific use — e.g., mobile phone allowance or home office allowance.
Compensation Package	A grouping of compensation guidelines — grades, grade profiles and their associated steps — and plans that you can assign to workers as a set. Compensation packages provide a quick view of the eligible plans for a particular job or group of employees.
Compensation Plan	A component of pay that is used to assign monetary amounts to a worker's pay. Example: A salary or an allowance. Some compensation plans are discretionary — e.g., a commission — and you are not paid from these compensation plans in every paycheck. Other plans, such as a salary plan, are included in every paycheck.

Compensation Waiting Period	A rule that defines when employees become eligible for a merit plan. You base the rule on a single value, such as a hire date.
Frequency	Used in compensation and payroll to help calculate worker compensation and pay.
Individual Target	Either an individual target assigned to a worker in worker compensation — different from the plan target — or the target for each employee calculated by Workday during the bonus or merit process, based on configuration options.
Merit Process	A sequence of one or more tasks related to defining, targeting and awarding merit pay to employees.
Supplemental Earning	Any compensation paid in addition to an employee's regular wages that includes, but is not limited to, severance or dismissal pay, vacation pay, back pay, bonuses, moving expenses, overtime, taxable fringe benefits and commissions. In Workday, only supplemental earnings can be grossed up.

Payroll

Term	Definition
Forward Accrual	Estimates payroll payments to be made in a future payroll period that spans two financial reporting periods.
Frequency	Used in compensation and payroll to help calculate worker compensation and pay.
Fringe Actuals	Employer portion distributed over 12 months and charged to the fringe pool worktags.
Fringe Benefit Expenses	Applicable to Actuals and/or Commitments and Obligations.

Fringe Expense	The total annual expense charged in full over the Academic Period. Calculated by CFBR.
Fringe Payable	The amount associated with the employer portion of fringe is due to vendors.
Manual Payment	An off-cycle calculation that records check or cash payments made outside Workday Payroll.
Nonactive Worker	A worker with a Terminated or On Leave status for payroll processing purposes. A run category can define rules for processing nonactive workers.
On-Cycle Payment	Payment made in a scheduled payroll run.
On-Demand Payment	An off-cycle payment that replaces — or is issued in addition to — a worker's on-cycle pay.
Off-Cycle Payment	Payment made outside the regularly scheduled payroll run. Examples: Manual, On-Demand, Reversals and History Payments. An unscheduled payroll run, such as manual, on-demand or reversal. Enables you to issue additional or replacement payments.
Pay Component	An earning — such as base salary or bonus — or deduction — such as federal withholding taxes or medical — that applies to a worker's gross-to-net pay calculation or tax liability.
Payslip	Paycheck — PeopleSoft.
Pay Group	A group of workers defined as having their pay calculated and processed together. Workers in a pay group must share the same period schedule.
Pay Rate Type	Defines whether the worker is paid a salary or a certain amount per unit of time. Example: Hourly or weekly. Defined by country and associated with job profiles and, by extension, with employees in that job profile.

Payroll Actuals	Salaries and Wages, Employee Deductions, Net Pay and Employer Paid Expenses, Fringe Benefit Expenses.
Payroll Commitments and Obligations	Equivalent to Pre-Encumbrances and Encumbrances. Salaries and Wages, Fringe Benefit Expenses.
True Up	To pay the outstanding balance for one or more bonus plans to meet the bonus target.

Recruiting, hiring and jobs

Term	Definition
Candidates	When prospects are linked to a job requisition.
Contingent Worker	Contingent Workers consist of individuals performing work for the university but are not paid by ASU.
Dispositioned	Status of candidates that have been rejected for hire or declined a job.
Endorsements	External candidates can request referrals, and current employees can endorse them by responding to referrals — they can also decline. Endorsements are canceled if the candidate is hired or dispositioned or if the job requisition is closed.
Hiring/Position Restrictions	Hiring restrictions define rules and conditions for holding jobs and positions in a position management or job management organization, such as defining required qualifications, experience and skill levels of workers or restricting the business sites where a job can be filled.

Job Catalog	The collection of user-defined job family groups, which each contain job families, which each contain job families, available for use in hiring and other staffing transactions.
Job Category	Attached to a job profile, user-defined job categories allow you to track additional job information. You can define any job category that fits your business. Example: Whether specific workers, jobs or positions are "Direct Labor" or "Indirect Labor." The job category is displayed on the position — based on that position's job profile job category — which facilitates reporting at the position level.
Job Classification (Group)	Job classifications are required for job-related regulatory reporting and can be used to categorize job profiles. A job classification group is how you group and maintain individual job classifications.
Job Family	A grouping of Job Profiles. Can belong to one and only one Job Family group. A grouping of similar job profiles.
Job Level (Hierarchy)	Categorizes job profiles based on compensable factors such as the level of education, experience or training required to perform a job. Job profiles are assigned job levels and are organized into a hierarchy.
Job Management Staffing Model	One of two staffing models — job management and position management — supported by Workday. This staffing model provides the least control over the definition of individual positions: the hiring restrictions you define apply to all jobs in the supervisory organization, and you can define only one set of hiring restrictions for the entire supervisory organization. In addition, with job management, you do not set specific limits on the number of jobs that can be filled.

Job Profile	Defines generic features and characteristics — such as company insider type, pay rate type, competencies, and proficiencies — of a job and a position that uses that profile. The more specifically defined a job profile is, the more defined those jobs and positions will be by default.
Position	A position is a "chair" within a supervisory organization that consolidates key job information, such as job family, job profile, worker type, location, full-time versus part-time, etc.
Position Management Staffing Model	Workday supports one of two staffing models — job and position management. The position management staffing model provides the tightest control over hiring, as you can specify different staffing rules and restrictions for each position in the supervisory organization. In the Position Management model, workers must be hired into defined positions, which remain if a worker leaves the university. There is one worker to one position in this staffing model. Unlike job management, where a position disappears when the worker leaves, you can report on unfilled positions in a position management supervisory organization.
Position Requirements	Used in job requisitions to define rules and conditions for holding positions in a supervisory organization using position management as its staffing model. Position requirements enable you to: ● Define the required qualifications, experience and skill levels of workers hired into a position. ● Limit staffing to specific job families and job profiles. ● Limit staffing for a position to a specific worker type — employees or contingent workers.

	● Limit staffing for a position to a specific time type — full or part-time workers.
	● Restrict the business sites where a position can be filled.
Termination	Termination in Workday occurs when the active working relationship between the UW and the employee ends, whether voluntary or involuntary.

Reporting

Term	Definition
Custom Report	Custom reports are designed and built by ASU using the Workday Report Writer. They can be created new or as a copy of another standard or custom report.
Drilldown	Matrix reports 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.
Field (reporting)	In a Report Writer report, a field contains data related to a particular primary or related business object.
Filter	Sorts out undesired data in reports.
Matrix Report	You can create three types of custom reports: simple, advanced and matrix. A matrix report forms

| | the foundation for custom analytics. It summarizes data by one or two fields that contain repeating values.

The resulting matrix is displayed as a table or chart that users can drill through to see the details. Matrix reports also provide filtering, run-time prompts, worklets and report sharing features. |
|---|---|
| **Prompt (reporting)** | A Report Writer report can be defined to prompt the user for filtering criteria when they run the report. Report prompts can also be built into a data source. |
| **Prospects** | Potential applications, pre-application. |

Security

Term	Definition
User-Based Security Group	A user-based security group grants workers, not positions, as members. When a worker is assigned to a user-based security group, they maintain access to it regardless of whether they remain in their position.
Role-Based Security Group	A role-based security group specifies one organization role and includes workers in job positions defined for that organization role. Workers assigned roles in a role-based security group can initiate and/or approve business processes defined for that role.

Example: Only the Compensation Partner role-based security group can approve compensation in a new hire business process. |
| **Security Groups** | Group of specific users or roles with permission to view information or initiate, review or approve business processes and their contained items. |

Talent

Term	Definition
Succession Plan	Track candidates for a specific position.
Succession Pool	Track candidates for one or more job profiles.

Time and absence

Term	Definition
Absence Calendar	Allows workers to submit absence requests — which then follow a path for approval — and provides a view of a worker's use of various absence plans — vacation, sick time, leaves of absence, etc.
Accrual	Defines how much time off employees can accrue, the timing of the accrual and other rules. Can define eligibility rules, frequency and limits that differ from the time off plan.
Carryover Limit	The maximum time off employees can carry over from one balance period to another.
Cascading Leave	A sequence of related leave types that are linked together. When an employee meets the conditions for ending a leave, Workday generates a return from leave request and a separate request for the next leave.
Health Time	Sick Time in PeopleSoft will now be Health Time in Workday.
Intermittent Leave	A single leave of absence taken as separate blocks of time. To facilitate tracking, you can coordinate time offs with leaves of absence. Validation rules and supporting data for coordinated leaves and time offs can reference combined balances.

	Example: Eligibility and validation rules can check to see if an employee has a sufficient balance across coordinated leave types and time offs to take all days in a leave of absence or time off request.
Leave of Absence	The return to work date is not always known — estimate. The request is based on a range of dates, including the first day of leave and expected return date, which cause a status change — "On Leave" depending on configuration — are typically longer, and the worker must be returned after. Examples: Family and Medical Leave, Maternity Leave, Sabbatical.
Time Off	The expected return date is typically known upfront. The request is based on each day the employee is expected to be off work, does not cause a status change, is typically shorter and the worker does not need to be returned after. Examples: Sick Time, Vacation Time, Floating Holiday, Bereavement.