



Quick Reference Guide —Key Terms—

Overview

Welcome to Santa Clara! This reference guide covers the basic vocabulary to get started using **Workday** and the features that will help you use the system. All the **key terms** you will encounter are listed below.

Key Terms

Actions	Appear in your inbox under the actions tab and are items that are pending your input, review or approval in order for the business process to continue through its steps.
Approval Chain	In a business process, a hierarchy of managers can be defined to approve a process, one-after-the-other. The process will designate how many levels up the management hierarchy the approvals will need to route.
Approver	The role responsible for approving business processes in Workday. Generally, this is the Budget Partner and Associate Dean role with final approval resting with a central role (i.e. HR Operations).
Archive	Appears in your inbox and lists historical actions.
Business Process	A business process (bp) is a sequence of one or more tasks that accomplishes a desired business objective. In Workday, a business process is a built in workflow that allows a transaction to pass through a series of reviews and approvals. Examples of business processes are hiring an employee, changing an employee's compensation, and adding an additional job to an existing employee. Workday delivers a powerful business process configuration tool that enables you to define organization-wide or at a more local level. Business processes in Workday are agile functions that can easily be edited for adherence to changing policies and procedures.
Business Process History	Historical record of actions associated with a specific business process. Includes information on the task, step, status, completed on date, due date and the individual/role on which the process is awaiting action.
Checklist	A checklist step is a collection of To Dos that are grouped together and must all be submitted before that one "step" will be completed.

Employee Type	A user-defined type that you assign to each employee when the employee is hired. It allows an organization to group employees who are defined as the same cohort under university policy and statutes. Workday allows us to define these types based on our business needs. The employee types in Workday will include: Fixed Term, Part Year, Regular, Student and Temporary.
Initiator	The role that is responsible for initiating a business process. Each business process can have multiple possible initiators. For example, HR Partner and Academic HR Partners can both initiate the Create Position business process.
Job Family	A grouping of similar job profiles. A job family can be used to broadly define the line of work associated with the job profiles assigned to it. For example – the Information Technology job family will hold job profiles related to jobs that perform IT related tasks.
Job Profile	A job profile is assigned to any position that exists in Workday. A job profile is similar to what we think of today as a job code and includes generic features and characteristics of a job/position that uses job classification. It defines key features such as pay rate type, FLSA status, federal compliance classifications (EEO, AACP, IPEDS), work shift and has the ability to hold information such as qualifications, compensation grade, job description and more. All positions in Workday will be required to have a job profile
Location	A worker's location reflects his or her actual work location. They are best suited for accurately tracking where employees are physically located across the university.
Notifications	Appear in your inbox under the Notifications tab to notify you when a business process has been completed.
Organization	An organization refers to a grouping used to organize people, resources, workers, and other organizations. Organizations provide management, visibility into, and reporting (roll-up) structures for employee allocation. Organizations can be defined for application uses like defining departmental hierarchies (Supervisory Organizations),

Position	A seat to be filled by an employee. A position must be created or exist before an employee can be hired. The position is created within a Supervisory Organization, given a title and short description and then assigned default attributes such as Employee Type, Time Type, Job Family and Job Profile that will then transfer over to any employee's job details when they are hired into that position. Vacant positions appear in a Supervisory Organization as unfilled and remain that way until they are either filled or closed.
Reason Codes	Pre-defined reason codes allow users to select why they are initiating a process in Workday, and that selection often determines the path the rest of the process will go until it successfully completes.
Review vs. Approval	Reviewers and approvers have all the same approval authorities except that a reviewer can also edit values prior to approving.
Roles	Each Workday user is assigned a role or roles in Workday. Professionals in the HR community have been assigned the role of HR Partner and/or Academic HR Partner, and financial professionals have been assigned the Budget Partner role. Every employee is assigned the Employee as Self role.
Security Groups	Security groups are a collection of users or 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.
Supervisory Organization	Groups employees into a management hierarchy. All faculty, other academic appointees, staff, students and contingent workers must be hired into a supervisory organization.
Task	A business process step that must be completed in order for a workflow to go to the next step.
To Do	Steps in the business process that act as reminders to the user to complete or update data in a section of Workday that is outside of the business process.
Validation Rule	Rules that prevent the entry of a business process and instead triggers an error or warning message upon submission and prompts for further action.
Worklet (Application)	A collection of information grouped together for viewing and tasks. These are the icons that appear on the landing page when you login to Workday.