WORKDAY GLOSSARY

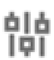
June 2019

UNIVERSITY OF WATERLOO

CONTENTS

ICON GLOSSARY

Icon	What it means/How to use
	Workday logo Click on this logo anywhere in the application and you will be returned to the home page.
	Search Click on the magnifying glass to search for tasks, employees, organizations and reports. When you start typing a word, choices will begin to auto populate.
	Notifications Notifications are messages letting you know about tasks that have been completed or may require additional attention.
	Inbox All approvals, reviews, to-dos and other action items are accessed through your Workday inbox. Action items remain in your inbox until you review and take the appropriate action.
	My Account My Account provides access to your Worker Profile, settings, and help, which guides you to the Workday User Guides.
	Configuration or Task Actions Click on this icon to access the configuration settings for the specific screen you are on. Options may include *Skip this Task* or *Re-assign Task*.
	Export to Excel Click on this icon to download the data into an Excel file.
	Filter Click on this icon to narrow down the results provided.
	Chart Options Click on this icon to view the page information as a graph or chart.
	View/Edit Grid Preferences Click on this icon to change the column preferences for the data displayed.
	Edit Click on this icon to enter data into the field.

Icon	What it means/How to use
*	**Red Asterisk** Indicates a required field.
	**Undo** Click on this icon to undo data changes made.
	**Delete** Click on this icon to delete an entry or section.
	**Save** Click on this icon to save the data entry made.
	**Prompt** Click on this icon to view a list of menu items.
	**Print** Click on this icon to download a printable PDF version of the information displayed on the screen.
	**Close** Click on this icon to close the current display box.
	**Configure Chart Details** Click on this icon to change the display options for the chart presented.
or 	**Related Actions** When this icon is displayed next to an object, other actions and tasks are available related to that object. Hover over an item to reveal the icon.

APPLICATION ICONS GLOSSARY

Application icons are displayed on your home page and provide easy access to tasks and information related to a group of business processes. Some applications are added to all employees' home pages, others are added depending on your job needs and some are optional applications that you can add yourself.

Application	Purpose
Absence	**Absence** Use this icon to view your planned absences (e.g. vacation days, sick days), vacation balances, or to request a new absence.
Benefits	**Benefits** Use this application to access or update benefit information including benefit elections, dependent and beneficiary information and coverage details.
Directory	**Directory** Use this application to find contact information for employees of the University of Waterloo. You can search all employees or by location, management chain or supervisory organization.
Learning	**Learning** Use this application to browse available courses, register or drop courses and view your learning transcript.
Onboarding	**Onboarding** This application is an onboarding dashboard for new employees. It provides a list of required training, tools for getting started and a list of helpful contacts.
Pay	**Pay** Use this application to access pay information including pay slips, tax withholdings and to view or edit direct deposit details.
Personal Information	**Personal Info** Use this application to view and update your personal information, contact information, and emergency contacts.
Time	**Time** Use this application to enter casual hours or overtime worked.

KEY BUSINESS PROCESS GLOSSARY

A business process is made up of a collection of tasks that are completed in a specific order (initiate, review, approve) to accomplish a desired goal (e.g. casual hire). Business processes drive the workflow through to process completion.

Term	Who can initiate?	Definition
Hire Employee	• Manager • Campus Partner	• Initiate new hires and rehiring of previous employees into the Job Management staffing model (includes casual or student positions) • Hire to provide non-UW employees with payments such as honorariums or awards
Hire Approvals	• Approvals flow through the *Hire* business process	• Approvals are required by the hiring manager as well as by the signing authority for all funds
Add Job	• Manager • Campus Partner	• Add an additional job to a current UW employee
Termination (Resignation/ Retirement)	• Manager • Employee	• End the employment of an individual who has resigned or a temporary/definite term appointment that has completed • Employee can initiate a resignation – routes to the manager to complete the termination process
Enter Time for Worker	• Manager • Timekeeper • Employee	• Hours entered and submitted each week a <u>casual</u> employee has worked • If no hours are submitted in time entry, the casual employee will not be paid • Overtime hours entered for regular and temporary staff to be paid out on top of their regular earnings

Time Entry Approval	• Manager • Cost Center Manager/Signing Authority (if applicable)	• Hours must be approved by the manager in order for them to be paid • If a Cost Center has been entered in the time entry block to override the primary Cost Center for the worker or a rate has been entered to override the default rate, the signing authority will receive an approval action item in addition to the manager approval
Request Absence	• Employee • Manager	• Requested time off completed through the employee's absence calendar • Date(s) and time off types are selected and sent to the manager if initiated by the employee • If an absence request is initiated by the employee's manager, the request is automatically approved
Absence Request Approval	• Manager	• An action item sent to a manager's Workday inbox to approve time off, requested by a direct report

GLOSSARY OF TERMS

Term	Definition
Supervisory Organization	• Reflects who reports to whom - groups workers into a management hierarchy • All employees must belong to one • Business processes flow in alignment with the supervisory organization (i.e. items such as hires, absence approvals, etc., will route to the manager assigned to the supervisory organization)
Staffing Model	• Used to determine how jobs are defined and filled • Provide different levels of control over staffing and support different staffing goals • Workday has two staffing models: 1. ***Position Management (PM):*** A position must be approved prior to an employee being hired into the position. This is used for all regular and temporary staff (>3 months) positions approved through iCIMS and for regular ongoing/some definite term Faculty roles 2. ***Job Management (JM):*** No restrictions or position approvals are required prior to hiring an employee. Job Management is used for flexibility to support casual, student and definite term non-faculty roles, as well as Colleges & Affiliate roles. Job Management supervisory organizations will all have *JM* in the name. • Typically each supervisory organization is assigned both *Position Management* and *Job Management* staffing models
Job Family Group/Job Family	• **Staff** includes regular and temporary staff, casual, and student employees • **Faculty** includes regular and definite term faculty • **Non-Faculty** includes post-doctoral fellows, research associates and sessional lecturers • **CUPE** includes Plant Operations and Food Services staff • **Colleges & Affiliates** includes the four colleges, Imprint and the Canadian Water Network employee types • **Retirees**

Employee Types	• **Regular**: Ongoing staff and faculty • **Temporary (Fixed Term)**: Staff appointments for periods exceeding three months but less than 2 years, and regular weekly work hours (e.g. 21 hours/week). These hires are processed through the recruitment system, iCIMS. • **Definite Term (Fixed Term)**: Non-faculty positions, such as post-doctoral fellows, and research associates, and part-time definite term lecturers. These hires are initiated through paper forms and entered into Workday by HR. • **Student**: Work performed is part of their program. Student type is to be used for co-op students including program funded such as Work Placement, URI and NSERC USRA, Graduate Teaching Assistants, Graduate Research Assistants, Undergraduate Teaching Assistants and Undergraduate Research Assistants. Payments for students are set up during the hiring process and are typically paid monthly for the duration of a term. • **Casual**: Any employee (student or not) who is employed for less than three months, on an intermittent basis, or who do not have regularly scheduled hours of work. These employees are initially hired through Workday and then hours are submitted through *Time Entry* when hours are worked (paid bi-weekly).
Position	• Includes your position title and position number which is a unique identifier tied to your position • Position numbers are generated for all student, casual, temporary and definite term appointments
Job Profile	• Captures general characteristics of a position, identifies salary grade, National Occupational Classification (NOC), location, etc. • These are used for other Workday processes and reports (e.g. performance management, workforce planning, benefits, talent management and reporting)
Pre-Hire	• An individual in Workday that is not currently assigned to a job (e.g. terminated employees or employees who are created that have not yet been fully hired)
Academic Appointment	• Information pertaining to a faculty member’s tenure and rank

Contingent Worker	• An individual who is not receiving pay or benefits from the University (e.g. individuals being paid from a 3rd party staffing agency or visiting scholars and researchers)
Account Information (Unit 4)	
Cost Center	• The salary account for the employee's compensation • Consists of *Work Order* and *Activity* • If two or more accounts are used, then the primary account is captured in this field and all others are captured in the costing allocation screens
Costing Allocation	• Used only when there is more than one salary account where payments are being charged
Org Assignments	• The primary salary account an employee is set up with
Worktags	• A field used to override a Cost Center • Used in *Costing Allocations* and *Time Entry*

OTHER KEY INFORMATION

- *(Terminated)* after an employee name: The employee is not currently in an active position on Workday and needs to be rehired when/if applicable.
- Graduate students will not have an active profile if they are not on a work term
- Direct deposit information can only be updated from a campus IP address
- *Alert/Warning* – This message is displayed in yellow and conveys information the user should be aware of to help prevent a future error. The user can continue in the business process without action on this message.
- *Error* – This message is displayed in red and prevents the user from moving forward in the business process until the error is corrected. An example of a common error would be failing to enter a value for a required fields.
- *Comment Boxes* – Allow a user to provide additional messages on a specific page to communicate to recipients of a business process within the Workday system. When an item is sent back to a step within the business process, a comment will indicate what action is required.

WORKDAY SECURITY ROLES

Cost Center Manager – Responsible Person listed in Unit 4 – approvals will route to this individual if there is no Signing Authority attached to the account for new hires initiated in Workday (casual staff and students). Time entry will also be routed if the Cost Center has been overridden.

Signing Authority – Signing Authority listed in Unit 4 – approvals will route to this individual for all new hires initiated in Workday (casual staff and students). Time entry will also be routed if the Cost Center has been overridden.

Timekeeper – Can enter time to be paid out and absences on behalf of employees. Requests entered will route to the employee's manager for approval. This individual cannot approve time or absence requests.

Campus Partner – Ability to hire and add jobs within the Job Management staffing model in Workday. Hire events will route to the manager of the supervisory organization where the employee is hired under.

Manager – An individual with regular ongoing staff/faculty or temporary staff positions reporting to them. Responsible for approving hires, time entry and absence requests. Able to hire employees, submit resignations, enter time and absences, and delegate business processes.