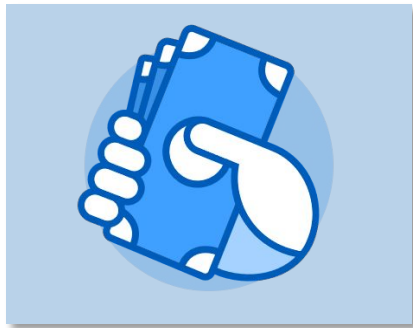# WorkSmart Crosswalk Glossary

This document organizes definitions related to the WorkSmart Project and Workday to provide a dictionary of new terminology for State of Iowa Employees.
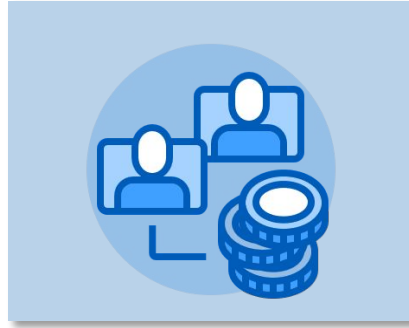
Click on an icon to jump to a particular section of the Crosswalk Glossary.
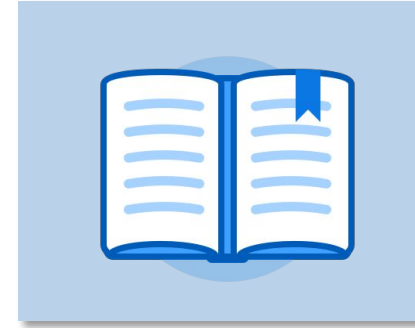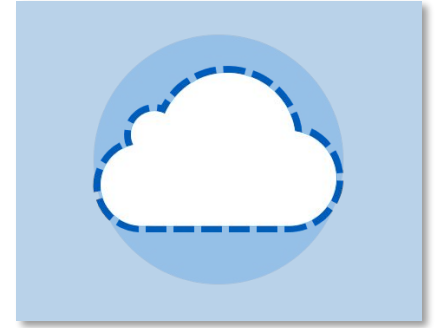
Human Capital Management (HCM)

Financial (FIN)

Human Capital Management/ Financial (HCM/FIN)

State of Iowa Nomenclature

Workday Terms

Last Update: July 16, 2021. *This document will be updated as needed. Link to the website for the most current version.*

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Application (App)
Also known as *Worklet*, an Application is an icon on your Workday Home Page. It provides easy access to tasks, analytics and custom reports, and information you use on a regular basis.

Business Process Instance
A business process that has been started or initiated and is in the process of being completed.

Cost Center
An organizational unit to which costs are charged (generally at the level at which budgets are created and managed and typically used to house people and their associated costs).

Human Capital Management (HCM)
The group of Workday applications that unifies Human Resources, Payroll, Benefits, Absences, and Time Tracking into a single system-of-record.

Job Family (JF)
A broad group of job profiles which are related to one another by a common field of work and/or collective bargaining agreement.

Job Family Group (JFG)
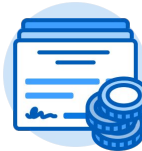A grouping of all job profiles by the applicable branch of state government. *Formerly: Job classification series*

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Pay Component
An earning (such as a 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.

Pay Component Group (PCG)
A collection or combination of related earnings, deductions, or pay component related calculations combined to simplify payroll calculations.

Pay Group
A payroll-specific Workday organization that controls who, what, and when to process.

Project
Refers to fiscal activity wherein the scope of work has a defined start and end date, such as a construction project, and related expenses are tracked.

Roles
A group of people who have specific responsibilities and permissions. Access to certain data is determined by the worker's role. When a business process runs, the role defined for each step includes all 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 is done via a security policy, which grants access to the users associated with the security group.

Supervisory Organization
Groups workers into a management hierarchy that serves as the primary organization type in Workday HCM. All workers are hired into supervisory organizations. Organization assignments such as company, cost center, and region, as well as unique business processes, can be configured for supervisory organizations. *Formerly: Span of control*

Tasks
Actions a worker must take in a business process. Tasks may be reassigned or delegated. Workers are notified of tasks by either Notifications or Inbox Alerts within Workday.

To-Do's
Reminders to do something outside of Workday. They can be part of business processes and must be marked complete before the workflow will go to the next step.

Worklet
Also known as *Application*, a Worklet is an icon on the Workday homepage that provides access to groups of related tasks; used to organize tasks and reports by functional areas.

Life Event
A benefit event that occurs in an employee's personal life, such as getting married or having a child.

Appropriation
An authorization to spend by the Iowa legislature. These will align with the existing appropriation values used in I/3.

Configurable Security
Workday's security framework controls access to organizational structures, processes, and reports through securable items organized in domains and business processes. Each group has corresponding domains and business processes, which can be controlled through security policy modifications. *Formerly: Security*

Expense Items
A more detailed itemized listing of goods and services or like expenditures purchased compared to Spend Categories. *Formerly: Object code*

Foundational Data Model (FDM)
The data model used across HCM and Financials that establishes the foundation for Workday. The Transitional FDM for Phase 1 is a subset of the State's I/3 chart of accounts mapped to Workday dimensions.

Fund
Allows for self-balancing journals to track revenues and expenditures. They are often separated into different fund types and are characterized by restrictions. Funds are available as a worktag in financial and payroll transactions. Funds can be grouped into hierarchies for reporting.

HRIS Payroll Unit
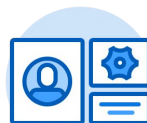The payroll unit portion of the 18-digit payroll number.

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Costing String (I3)
A field in Workday that captures cost accounting elements for transfer of information to I/3.
Formerly: Department, Program, Activity, Department Object, Task, Task Order

Organizational String (I3)
A field in Workday that captures department, unit, and subunit for transfer of information to I/3. This will be replaced in Phase II. *Formerly: Department, Unit, Subunit*

Organization
A basic building block to the Workday application. Organizations are defined to group workers and financial transactions. Common organizations delivered by Workday would be company, fund, location, etc. Organizations are grouped between Financials and HCM.

Position
Consolidates key job information such as job family, job profile, worker type, location, full or part-time. Workday position serves the same purpose as the HRIS seat number. However, the values are not mapped directly. In Workday the 18-digit payroll will no longer exist except for historical purposes.
Formerly: Seat number

Spend Category
Classification of like expenditures, grouped for searching and reporting on acquired items and services, and a dimension in account posting rules for procurement and spend that drives accounting behavior. *Formerly: Class code*

Work Reporting Code
A worktag used for activity tracking.
Formerly: HRIS Work Reporting Code

Business Object
Workday stores data as business objects (organizations, workers, positions, etc.). Similar to database tables or worksheets in Excel, Workday business objects have fields (columns) and instances (rows). Related business objects are automatically linked together in Workday.

Business Process (BP)
A workflow or set of tasks which need to be completed for an event to occur. It includes the order in which they must be done and who is able to do them.
***Formerly: Workflow***

Company
Internal organizations representing business entities to which transactions are posted and where a balance set of books exists. In the SOI tenant, individual departments and agencies with separate budgets are considered companies. ***Formerly: Department/Special Department***
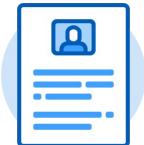
Job Profile
A job classification including management level, pay rate type, skills, qualifications, compensation, job description, etc. ***Formerly: Job classification***
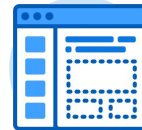
Tenant
A secure instance of Workday dedicated to and configured for the State of Iowa. After Go Live, the State of Iowa will conduct business the final production tenant.

Worktags
A keyword or label representing a business dimension you can assign events (transactions) and business objects to make their business purposes clear and establish their common relationships through classification.

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Benefits Target (Coverage Target)
Defines whether a specific health care plan or insurance plan applies only to the employee or also to the dependents, spouse, family, and so on. *Formerly: Benefit Tiers*

Employee Changes (from employee profile tabs or related actions)
Refers to personal information changes through employee self-service such as address and direct deposit. Employees can change this information at anytime. *Formerly: P-1's*

Hire Date
The most recent date of hire. For instance, if an employee is rehired, the date will be reflected here. The hire date may be different than the "Original Hire Date".

Location
A physical workspace. Typically, a location will be assigned to a worker, contain an address, and work hours assigned. *Formerly: Building*

Manager
Defined by supervisory organization roles. Only those who are managers of supervisory orgs. are assigned the manager role. *Formerly: Supervisor*

Original Hire Date
An employee's first working day on the job. This date will not change. For instance, the original hire date will not be updated even if an employee is rehired, this update would be reflected in the "Hire Date" category instead. *Formerly: Employed Date*

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Upper Limit
The maximum number of hours an employee can earn on a time off plan. *Formerly: Ceiling*

Work Schedule Assignment (Work Schedule Calendar)
A calendar that defines the days and hours a worker is scheduled to work. In Time Tracking, work schedule calendars affect time entry options, calendar displays, and time calculations.
Formerly: Default Timesheet

WorkSmart
The Iowa WorkSmart Project (WorkSmart) is the implementation of Workday. The purpose of WorkSmart is to unite state government together behind one vision, as one team, with one resource.

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Compensation Grade

A component or object of compensation that can be assigned to individuals or groups of employees. A grade is a standard compensation range for a given job or job level and can be divided into grade profiles or steps. Grades are not tied directly to job profiles; however, compensation eligibility rules specify both grades and job profiles as rule conditions, which is how they are associated. You can see which grades are related to which job profiles in the Job Catalog report. *Formerly: Pay Plan, Pay Grade*

Contingent Worker

A worker who is not an employee. Contingent Workers will not be included in the State's Workday tenant. *Formerly: Contactor*

Continuous Service Dates

Continuous service date is defined by the organization. Typically, Continuous Service Date or Time Off Service Date coincide with Original Hire Date in order to allow for breaks of service to count toward Time Off eligibility. Service dates are usually updated and maintained by HR during the hire and rehire process. *Formerly: Vacation Date*

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.

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. Delegation functionality may or may not be included in your organization's configuration.

Direct Deposit

A payment election. 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.

Edit Position

Edit position and/or Edit position restrictions; change organization assignments (if cost center or appropriate code is changing); move workers (if span of control changes). Change Organization Assignments can be done for a worker or a position. Examples of assignments include Business Unit, Company, Cost Center, Fund, Gift, Grant, Program, Region or a Custom Staffing Organization. *Formerly: M5 Classification Changes and Position Moves*
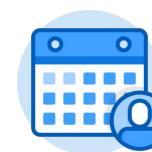
Expense Report

Documents the output of money from an individual or group to pay for an item or services. Expense reports can be created by an employee or on an employee's behalf through delegation or security access to the Create Expense Report for Worker task. *Formerly: Travel Payment*

Hire Date

Hire date of the employee.
Formerly: Service Date (State Agency)

Notifications

A section for notices of completed business processes.

Off Cycle Payment

A payment made outside the regularly scheduled payroll run. Manual, on-demand, reversals and history payments are classified as off cycle. *Formerly: Rewrite*

On Demand Payment

An off-cycle payment that replaces, or is issued in addition to, a worker's on-cycle pay. *Formerly: Rewrite*

Open Position
An open role or job within Position Management.
Formerly: Vacant Position

Payslip
An online or printed summary of your gross-to-net earnings. Also referred to as a pay stub. Payslips can be found in the Pay application.
*Formerly: Pay Warrant*

Payment Election
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. *Formerly: Direct Deposit*

Probation End Date
The last date of a probation period. A probation period is a period of special monitoring of a worker that is often mandated by local regulations and policies. *Formerly: Status Expiration Date*
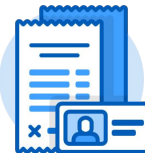
Spend Authorization (SA)
A budget of expenditures planned for future out of state travel. The employee initiates the process of creating a spend authorization. Must be submitted for approval prior to travel. Managers take actions on spend authorizations after they are submitted. Spend authorizations act as a cost control or expense policy compliance tool.
Formerly: Travel Document Authority

Submit - Approve
A clickable button to accept and submit your changes, while advancing the business process to the next step. *Formerly: "Y" in HRIS to approve*

Workday
Workday is a cloud-based human capital and financial management software solution which will replace two of the State's current legacy systems - the Human Resources Information System (HRIS) and Integrated Information for Iowa (I/3).

Worker
An employee or a contingent worker.
Formerly: Employee

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