



**Manager Job Aid**

# **ICONS & TOP TERMS**

**NOTE: WORKDAY IS CONSTANTLY UPDATING THEIR TOOLS, SO THIS JOB AID  
MAY NOT REFLECT EXACTLY WHAT YOU SEE IN WORKDAY.**

# Icons and Terms

## ICONOGRAPHY

	<b>ADD/SUBTRACT</b>	Adds or removes a row to the current grid view.
	<b>ALERTS</b>	Notifies you of potential problems with information entered on a page, but does not prevent the task from being completed.
	<b>ARROW</b>	Opens the page to additional areas that can be viewed or edited.
	<b>ATTACHMENTS</b>	Allows you to attach PDFs, Word and Excel documents to a task.
	<b>CALENDAR</b>	Opens a calendar allowing you to select a date.
	<b>CHART</b>	Used to view a report as a chart.
	<b>EDIT</b>	Allows you to add or remove information on a page or within a field.
	<b>ERROR</b>	Appears when a specific field(s) is missing information – or has been entered in conflict with an established rule. You will not be able to complete your task until the error has been fixed.
	<b>EXCEL</b>	Views page as exported Excel document.
	<b>FILTER</b>	Creates a row on your report to filter data to display from one or more columns.
	<b>HOME</b>	Both icons bring you back to the default home page.
	<b>PDF</b>	Used to view a report as a printable PDF.
	<b>PROMPT</b>	Presents a list of options for a specific field.
	<b>(RELATED) ACTIONS</b>	Found next to or below objects you're able to take action on. Sometimes, the ellipses icon (...) is hidden until you float your mouse over the object.
	<b>REQUIRED FIELD INDICATOR</b>	Indicates that a value is required for a particular field. Stops you from continuing with the process unless all fields marked required have a value.
	<b>SEARCH</b>	Use this to quickly search for tasks, colleagues, organizations and reports.

## WORKDAY BASICS

### APPROVE

Tasks in a business process may need approval. They typically are completed after reviewing an Inbox message and clicking Approve at the bottom of the message. People can approve a task if they have a pre-defined role and responsibility related to the business process.

The approval action either sends the business process to the next level approver or completes the process.

### BUSINESS PROCESS

The set of actions and approvals (the workflow) that need to be completed to complete a transaction. The business process is built directly into Workday. Once an action is initiated, it routes to the appropriate approvers to continue the process.

### CANCEL

Click cancel to exit a business process – you will be warned if any outstanding changes will be lost.

### INBOX

You can access your Inbox through the Inbox option on the profile drop down. Your Workday Inbox displays actionable items on two tabs:

- Actions tab: displays business process tasks that require your attention.
- Archive tab: displays business process tasks that you've acted upon from the last 30 days.

### INITIATE

The initiation step is the first step of a business process. When you act on an object in Workday (e.g. "Change Personal Name"), you are initiating the designated business process.

### NOTIFICATIONS

Appear under the Notifications tab in your view profile drop down. For example, a Notification appears when a business process has been completed. Notifications are tagged with a blue color, and are different than Tasks that require Actions.

### ROLES

Roles define a group of people with specific responsibilities and permissions. When a business process runs, the role for each step includes all of the colleagues in that role in the business process target organization.

### SUPERVISORY ORGANIZATION

An organization for a group of colleagues that report directly to one manager. A supervisory organization guides a team's reporting structure, and therefore business process approvals and visibility of colleague information.

### TASK

A step to complete, either standalone or within a business process. You will find tasks requiring your attention in your Inbox.

### VIEW (BUSINESS PROCESS)

Ability to see the status of the business process and report on it. Your security role controls what you can and can't see.

### WORKER

Workday's terminology for "colleague". A worker/colleague is either a colleague (paid by the company) or a contingent worker (paid by a third party).

### WORKLET

An actionable icon on your home page that groups related information, views or actions. Worklets provide easy and direct access to tasks and information that are used regularly.

# Icons and Terms



## WORKFORCE MANAGEMENT

### CHANGE JOB

A manager action that is a part of the Job Change > Transfer, Promote or Change Job process.

A manager has direct access to quickly manage actions related to direct reports – including changing a colleague's job details or compensation.

For details on when to use this action and the associated review or approval steps, refer to the **Job Change Manual**.

### CUSTOM REPORTS

Reports that are not included in Workday's standard (default) reports.. These are reports that have been designed and built by the HR Reporting & Analytics team.

### DASHBOARD

A specialized page containing a set of reports, providing an overview for data analysis on various items at a glance. An example is the Manager Dashboard, which contains several different manager-focused reports.

### DELEGATION

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.

### GRADE

A colleague's MMC grade level, i.e., A-J (or X for the Executive Team).

### GRADE PROFILE

Where applicable, the name of the salary range assigned to a colleague, based on grade, country, job family and location.

### HIRE DATE

The most recent hire date. For acquisitions, this would represent the date the colleague was onboarded as an MMC colleague.

### JOB PROFILE

The generic features and characteristics of a job, such as level, responsibilities, skills, and other qualifications.

### OFFICER TITLE

A colleague's corporate title. Examples at Marsh include Vice President and Managing Director. Examples at Mercer include Principal and Partner.

### ORIGINAL HIRE DATE

The original date a colleague started with the company. For colleagues hired through an acquisition, this date represents the colleague's hire date at the acquired company.

### POSITION

A unique "chair" or open seat within a supervisory organization. All colleagues require a Position in Workday.

A Position can be filled (populated by a colleague) or unfilled (waiting to be populated by a colleague).

To populate an unfilled position, you would need to open a job requisition on that position, and hire a colleague into it



## WORKFORCE MANAGEMENT

### PROMOTE

A manager action that is a part of the Job Change > Transfer, Promote or Change Job process.

A manager has direct access to quickly manage actions related to direct reports – including initiating a colleague promotion through the Change Job page.

For details on when to use this action and the associated review or approval steps, refer to the **Job Change Manual**.

### STAFFING EVENT

Any event that changes a colleague's position or job, such as a hire, transfer, or promotion.

### STANDARD REPORTS

Standard Workday reports are reports that have been created and are being maintained by Workday. These reports come pre-built and cover a wide array of business areas and processes.

### TRANSFER

A manager action that is a part of the Job Change > Transfer, Promote or Change Job business process.

A manager has direct access to quickly manage actions related to direct reports – including initiating a colleague transfer through the Change Job page.

Transferring a colleague between departments requires that both the current and future manager complete a set of actions:

- The manager in the outgoing supervisory organization initiates the transfer of the colleague.
- The manager of the incoming supervisory organization performs another set of actions to receive the colleague.

For details on when to use this action and the associated review or approval steps, refer to the **Job Change Manual**.

# Icons and Terms



TRAINING  
QUICK REFERENCE GUIDE

## Workday Resources: Top Terms and Icons to Know

### (RELATED) ACTIONS

Actions are indicated with an ellipsis icon (...) or an "actions" button and provide navigational shortcuts to activities you can complete without having to return to your home page. Sometimes, this icon is hidden until you float your mouse over an object that looks like a hyperlink, such as a name or an organization.

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#### QUICK NOTE:

- Can't find something in Workday? Try the search bar.

Have a smarter way? [Share with a colleague.](#)