Workday Concept: Worktags

What are Worktags?

- 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

How are Worktags used in Workday?

- Worktags can be selected by the user or default automatically based on:
  - User’s profile
  - Other worktags
- When determining applicable Worktags, the following elements must be considered:
  - Reporting (External and Management)
  - Usability
  - Security

For additional information or questions about the Workday@Yale program, please visit the program website at [http://Workday.Yale.edu/](http://Workday.Yale.edu/) or email us at Workday@Yale.edu.
Workday delivers a variety of worktags that can be used for different purposes. There are two kinds of worktags:

### Organizations

In Oracle, **Organization** refers to the “O” in PTAEO and Yale’s Organization Hierarchy. In Workday, the term **Organization** is a basic building block for managing information that is both financial and non-financial:

- Can be organized into hierarchies—enable reporting at different levels
- Roles and security can be assigned to any level of the hierarchy

### Basic ("Flat") Worktags

Basic worktags provide a quick and easy way to capture information that is needed for financial management. Examples include:

- Customer
- Supplier
- Employee
- Spend Category
- Job Profile