Workday Financials

Related Worktags

Last updated October 13, 2016
When the COA team sets up a segment, in some cases COA can tell the system to always default a Related Worktag. This default is not typically a “dummy value”, but is a meaningful related value that is right most if not all of the time.

- COA has specified which segments have Related Worktags – see a full list at Basic Configuration of COA Segments.
- The purpose of related worktags is to enhance usability after go-live.
- Worktags that default in can be changed by the user.
- All cost centers will default a “dummy value” for the General Project PJ000001. Users who need this to be a meaningful field can then change to a different project number.
- You will have the opportunity to influence certain related worktags through the continuing segment refinement work.

The COA segments that bring along related worktags can be called “Driver” segments. Yale’s “driver” segments are:

- Grant
- Gift
- Yale Designated
- Cost Center
- Project
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Related Worktags

Cost Center (Driver)

Project (General PJ000001 only)
Related Worktags

- Project (Driver)
- Program (sometimes)
- Location (Capital fixed asset only)
• Related Worktags (other than Fund) can be changed by the user at the time of transaction entry.

• Projects – requesting a related worktag of Program
  • After we are live in Workday Financials and the historical conversion of financial information is frozen, related worktag requests will be considered if they will be correct at least 80% of the time.
  • However, we recommend as a starting point only establishing related worktags that will be correct all the time.
  • Unit business offices will have the opportunity to request that projects include a related worktag of program after 7/2017. We recommend spending some time doing work in Workday before making such requests. The belief is that this time prior to go-live is better spent prioritizing the conversion itself and individual segments.
In the PTAEO-to-Workday-COA conversion program, the only related worktags being used are associated with:

- Grants
- Gifts
- Yale Designated
- Projects (capital only)

In fall 2015 and spring 2016, many units requested and were granted related worktags on projects – ex: Project PJ123456 has a related worktag of Program PG00035.

- There was an error in spring 2016 that caused the program numbers to be incorrect. As a result, the PTAEO-to-Workday-COA conversion was incorrect.
- All non-capital projects no longer have programs as related worktags.
- All of the involved programs and projects continue to exist as standalone COA segments. However, they are no longer “connected” in the system or in the conversion process.

Using two worktags together on a PTAO-to-Workday-COA mapping does NOT result in related worktags.