

# 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*

# Workday Concept: Worktags

*Workday delivers a variety of worktags that can be used for different purposes. There are two kinds of worktags:*

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## **Organizations**

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*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*

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## **Basic (“Flat”) Worktags**

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

