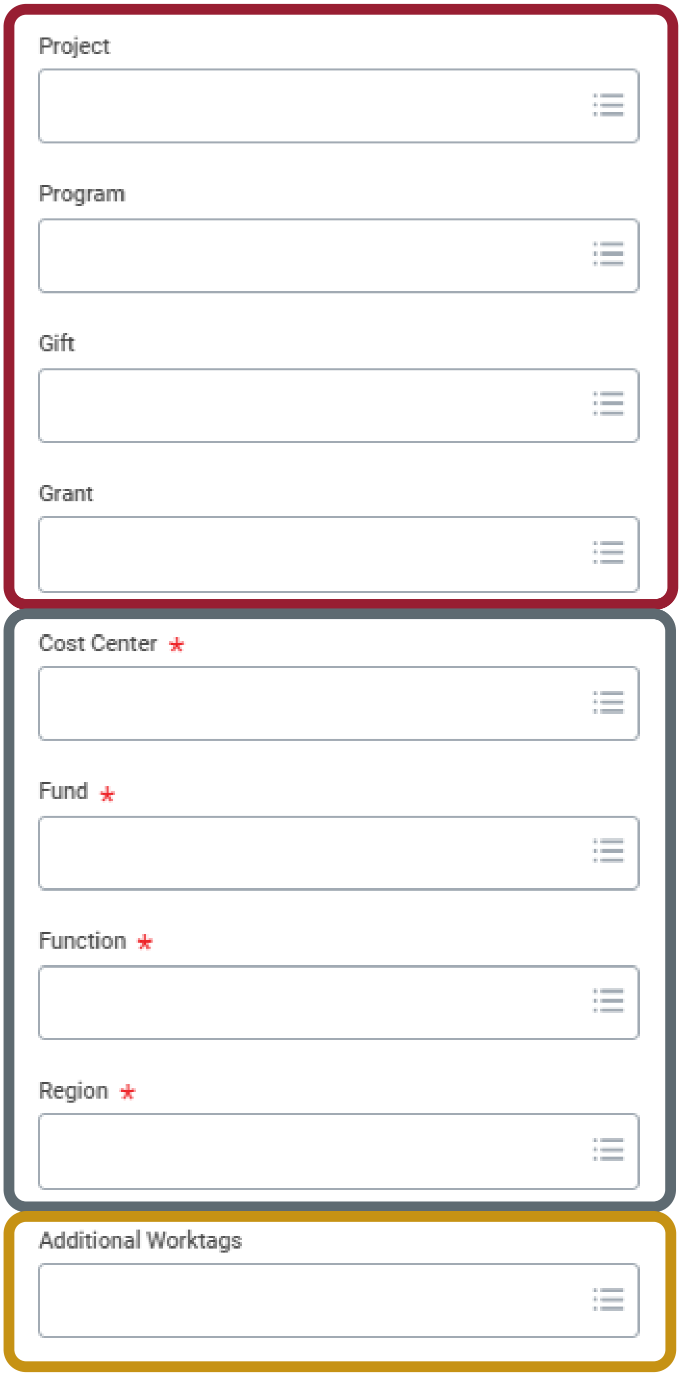
Workday Basics: Coding & Worktags

If you perform financial tasks in Workday, it's important to be familiar with worktags and how to apply them in order to properly code financial transactions. Here's a breakdown of the types of worktags you'll use, along with examples of each:



Use the OBIEE reporting tool to crosswalk legacy and Workday reporting values.

DRIVER WORKTAG

A type of worktag identifying the primary source that drives a transaction. Driver worktags include: **Project, Program, Gift,** and **Grant.**

RELATED WORKTAG

A type of worktag that can auto-populate or be manually added. Usually mandatory, related worktags include: **Cost Center**, **Fund, Function,** and **Region**.

ADDITIONAL WORKTAG

Are supplemental to a transaction. You can enter multiple if needed. If you can't find your worktag as a primary field, check Additional worktags. Additional worktags include: **Fee Assessment** and **Assignee**.

PRIMARY WORKTAG

Have their own field for entry on the transaction. May differ depending on the transaction and can include: **Spend Category** on Supplier Invoice and **Revenue Category** on Record Cash Sale.

Example