

# Key Terms

## All Employees

### Workday is here!

Get to know the system by understanding the key terminology in the glossary below.

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### SYSTEM AND BUSINESS PROCESSES

Workday Term	Workday Definition
<b>Inbox</b>	Similar to your email inbox, your Workday Inbox contains a list of items that you need to act on. You will need to go to Workday inbox often, if not daily depending on your role.
<b>Business Process (BP)</b>	The set of tasks that need to be completed for an event to occur, the order in which they must be done and who must do them. All transactions in Workday will be executed through the completion of Business Processes.
<b>Business Process Conditional Rule</b>	A condition attached to a business process task that, depending on the intended outcome, determines where it will be routed. HR DOA review, input and approval steps are reflected in business process conditional rules.
<b>Task</b>	A business process step that must be completed. A task could be to initiate, review or approve. A task may trigger a notification to alert users a task requires attention or that a task has been completed by the user or another user in the process.
<b>To-Do</b>	Reminder to do something in or outside the system; may be part of the business process and have to be marked complete before workflow will go to the next step. For example, HRBPs may need to verify some documentation or approval outside the system.
<b>Notification</b>	Messages informing you of a completed business process.

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### SYSTEM AND DATA SECURITY

Workday Term	Workday Definition
<b>Security Role</b>	Security Roles determine what you can see and do in Workday; they are not job titles. Security roles are Workday designations that determine access to the initiation and approval of business processes as well as to data in Workday.
<b>Security Group</b>	A security group defines a subset of people with specific responsibilities and permission in Workday (e.g., Managers, HRBPs, etc.). When a business process runs, the role for each step is determined by the supervisory organization.
<b>Role-based Security Group</b>	A role-based security group specifies one role and includes specific positions that are granted access to specific data. Permissions are defined and granted at the position level and are applied to the workers occupying those positions. Examples of role-based security groups are Employee, Manager, HRBP, Recruiter, Payroll Partner, and Compensation Partner.
<b>User-based Security Group</b>	A user-based security group has workers as members and is usually not restricted – meaning these users have access enterprise-wide to certain data. These are typically our Administrative roles (HRIS, Payroll, Compensation, Benefits) and when used in a security policy, grants access to certain data elements to all members of the group.

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### ROLES AND RESPONSIBILITIES

Workday Term	Workday Definition
<b>Initiate / Initiator</b>	<p><b>Initiation step:</b> The first step in a business process.</p> <p><b>Initiator:</b> The role that has permission to start/request a business process. Initiating a process/request does not guarantee completion/approval of the request.</p>
<b>Approve / Approver</b>	<p><b>Approve:</b> A task in a business process that requires action so it can proceed to the next step or to completion.</p> <p><b>Approver:</b> Required by HR DOA or otherwise defined by the process; action taken by a designated participant who has a defined responsibility for this task.</p>
<b>Employee as Self</b>	Perform personal and job related activities such as updating personal and professional profile information, entering time and requesting time off.
<b>Manager</b>	Performs actions on members of their supervisory organization(s). All leaders in Workday,
<b>Manager's Manager</b>	This role is used to capture the approval of the manager of the initiator (if employee) or the 2 <sup>nd</sup> level leader per the HR DOA.
<b>HR Partner (HR Business Partner)</b>	Performs HR functions for assigned organizations such as creating/reviewing positions and requisitions, job assignments, compensation changes and other employee-related actions. Can initiate most business process in Workday.

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### ORGANIZATIONS, TIME AND ABSENCE

Workday Term	Workday Definition
<b>Organization Assignment</b>	Used to track the financial impact of headcount; consists of all the elements that make up a valid accounting code to capture default head count costs; includes company, cost center, operating unit, FERC account; Financial assignments are made at the time of create position and can be modified at create requisition, hire, change job or ad hoc; will be reviewed by the Cost Center Analyst (CCA).
<b>Cost Center Analyst (CCA)</b>	Security group created for Williams to support leadership and ensure accuracy of organization assignments made up of FP&A analysts, Business Analysts or FOAs as appropriate.
<b>Absence</b>	Module in Workday where employees will request time off from work including PTO, floating holiday, military bereavement and jury duty. Leave including STD (leave type) and other types of leave will be managed by the Health and Group Benefits team.
<b>Time Off</b>	Reported time that is not worked. Common types of Time Off include Paid Time Off and Floating Holidays.

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### TIME ENTRY

Workday Term / Path	Workday Definition
<b>Time Code Group</b>	Exempt or Non-Exempt employee status, including shift eligibility, that determines the applicable time entry codes.
<b>Clock Hours / Hours Worked</b>	Time entry codes available based on employee's Time Code Group. Workday will calculate overtime and shift based on time entered. Must reconcile with any absence type hours submitted via the Absence module when reviewing timesheet to avoid over/under payment. <ul style="list-style-type: none"> <li>• Non-Exempt / Shift = Clock Hours (In/Out Time)</li> <li>• Non-Exempt / Non-shift = Hours Worked</li> </ul>
<b>Time Type</b>	Callout, Callout – Hours Worked, Upgrade, etc. Does not include time away from work (e.g., PTO) as this is managed via the Absence module and entered via timesheet.
<b>Time Type &gt; Time Entry Codes &gt; Field Activity</b>	<b>Regulated non-exempt field</b> employees use this to assign their non-project work to an Activity (what kind of work was done) and an Operating Unit (which asset was worked on).
<b>Time Type: &gt; Time Entry Codes &gt; Hours Worked (Override Default)</b>	<b>Regulated exempt</b> employees and <b>Headquarter office building operations</b> employees use this to assign their non-project time to an Operating Unit and/or Activity other than their default.
<b>Time Type &gt; Projects</b>	Employees use this to assign their time to <b>expense projects</b> .
<b>Time Type &gt; Project Plan Tasks</b>	Employees use this to assign their time to <b>non-expense projects (capital, reimbursable, etc.)</b> .

- **Note:** Due to the large number of projects, employees should use the search feature to enter the first few characters of the project (e.g., name or code) to narrow the selection.

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### EMPLOYEE TYPES, DEPARTMENTS AND HEADCOUNT

Workday Term	Workday Definition
<b>Worker</b>	A person who is either an employee hired by or is a contingent worker contracted by Williams.
<b>Worker Type</b>	Either Employee or Contingent Worker
<b>Contingent Worker</b>	A worker type that includes Williams' Leased Workers and Profile Workers; will feed from Fieldglass to Workday and will be visible in organization charts (ability to toggle on/off in org chart view).
<b>Supervisory Organization</b>	The foundation of position management; positions are organized by who they report to; an organization for a group of workers that report directly to one leader.
<b>Organizations</b>	A grouping used to organize people, resources, workers and other data elements. Organizations provide management, visibility into, and reporting (roll-up) structures for resource allocation. Organizations can be defined for uses like defining departmental hierarchies, project teams, etc. They can also be used to define cost centers and geographic or regional reporting structures.
<b>Headcount</b>	The number of workers in an organization.

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### JOB CODES

Workday Term	Workday Definition
<b>Job Profile</b>	Defines a set of common/default characteristics of a job such as compensation grade and range, ladder / level, high-level description and requirements. Managed by compensation, job profiles make up job families, which make up job family groups.
<b>Job Classification</b>	Job classifications are required for many kinds of job-related regulatory reporting and can be used to categorize job profiles (e.g., EEO-1, DOA, DOT, Safety Tier, etc.). A job classification group is the means by which individual job classifications are grouped and maintained. Ex: Full-time, Part-time, Contingent, etc.
<b>Job Family (Group)</b>	A grouping of job profiles, which in turn may be assigned to a job family group (e.g. Administrative Services Group), so job profiles can be organized according to how the organization works.
<b>Job Level (Hierarchy)</b>	Categorizes job profiles (and their associated jobs and positions) based on attributes such as the level of education, experience or training required to perform a job. Job profiles are assigned job levels, and those job levels are organized into a hierarchy.
<b>Roles</b>	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 workers in that role in the business process target organization.
<b>Additional Job</b>	A job held by a worker that is not his or her primary job. A secondary job profile is applied and additional compensation elements are applied (if applicable) such as per diem, geo diff, critical market, etc., and a matrix manager can be identified.

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### POSITIONS AND EMPLOYEE ACTIONS

Workday Term	Workday Definition
<b>Position Management</b>	The staffing model adopted by Williams with the implementation of Workday. Position Management allows for the tracking of unfilled, filled, closed and frozen positions. In order to hire an employee into Workday, an available, unfilled position must be available.
<b>Position</b>	A unique "seat" in a Supervisory Organization. All current workers, contingent workers and new hires are placed into Positions.
<b>Backfill (unfilled) Position</b>	When a position (seat) is vacated, the business process requires a review to determine if the position is eligible to fill (immediately or in the future). The position remains in the supervisory organization's approved headcount.
<b>Freeze Position</b>	Placing the position 'on hold' until a later time; not eligible for active recruiting pending business review.
<b>Close Position</b>	Removes the position (seat) from approved headcount. If the position needs to be added later, a new position will be created with all approvals required.
<b>Staffing Event</b>	Any event that changes an employee's position or job; for example: a hire, transfer or promotion. Staffing events can trigger an opportunity to change additional job details such as location, parking and/or fitness center elections (Tulsa and Houston based), supplemental or additional pay eligibility, etc.
<b>Change Job Business Process</b>	Employee-action related business process in Workday. Allows for transfer, promotion, compensation change, location and other job or position element changes such as changing the position / job profile, location, etc.
<b>Termination Date</b>	The first full day a person is no longer a Williams employee.

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### POSITIONS AND EMPLOYEE ACTIONS (Continued)

Workday Term	Workday Definition
<b>Requirements/Position Restrictions</b>	<p>Rules and conditions applied to a job profile to restrict hiring conditions. Usually enable you to limit staffing to specific job families or profiles, define locations for the position, define qualifications, experience and skills, and limit to other characteristics such as Full Time/Part Time, regular or project.</p>
<b>Job Overlap</b>	<p>Dual incumbency. Generally, only one worker can be in a position at a time. Job overlap is available if there is already a scheduled “vacate date” for a worker and you need to back-fill the position prior to the vacate date. In other words, allows two workers to accept the same seat.</p>
<b>Unavailable to Fill</b>	<p>The Unavailable to Fill Tab in the supervisory organization profile screen will display all positions that are closed or in frozen status. Any positions scheduled to be filled at a future date (future dated hires or transfers) and positions that have an availability in the future. If there are no positions in Unavailable to Fill, this tab will not display.</p>

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### COMPENSATION

Workday Term	Workday Definition
<b>Compensation Package</b>	A grouping of compensation guidelines (grades, grade profiles) and plans that can be assigned to workers as a set. Williams has one (1) package in Workday.
<b>Compensation Grade / Grade Profile</b>	Compensation Grade is assigned to a Job Profile based on the level of responsibilities performed by an incumbent of the Job Profile and market data. Pay ranges are defined in the Compensation Grade Profile.
<b>Compensation Plan</b>	A component of pay used to assign monetary amounts to a worker's pay such as a salary, an allowance (Geographic Differential) or a bonus (Frontline Quarterly or AIP). Some compensation plans are discretionary; you are not paid from these compensation plans in every paycheck.
<b>Eligibility Rule</b>	Eligibility rules specify one or more criteria that categorize workers into a group that is used to qualify them for participation in an HR-related task. Examples include benefit plans and compensation plans.
<b>One-Time Payment</b>	Business Process to request, approve and pay compensation plan such as Sign-on, Referral Bonus, Spot or Champion Award.

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### REQUISITIONS AND STAFFING

Workday Term	Workday Definition
<b>Job Requisition</b>	Enables users to request the process to fill a position. <u>All vacant positions will require an open job requisition to hire.</u> Job requisitions reflect the timing, requirements and other specifics related to the position's hiring requirements such as education, experience, etc., and other elements such as supervisory organization, and other details.
<b>Freeze Requisition</b>	When a decision is made to no longer actively recruit for an open position, Workday provides the ability to freeze the requisition until an organizational review is completed. You can unfreeze and resume recruitment after organizational review.
<b>Close Requisition</b>	Workday automatically closes job requisitions for positions that are filled through the recruitment process. When it is decided to no longer recruit for a position, the job requisition should be closed. Closing a requisition means the position is no longer available to fill and will require a new requisition and necessary approvals.
<b>Evergreen Requisition</b>	Used to recruit for positions that could be filled at various levels (e.g., Op Tech II or II) for the same position based on quality of candidate pool and/or supply of talent. A candidate cannot be hired on an evergreen requisition.

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### RECRUITING AND ONBOARDING

Workday Term	Workday Definition
<b>Position Requirements (Hiring Requirements)</b>	<p>Used in job requisitions to define rules and conditions for holding positions in a supervisory organization, with position management as its staffing model.</p> <p>Position requirements enable you to:</p> <ul style="list-style-type: none"> <li>• Limit staffing to specific job families and job profiles.</li> <li>• Restrict the business sites where a position can be filled.</li> <li>• Define the required qualifications, experience and skill levels of workers hired into a position.</li> <li>• Limit staffing for a position to a specific worker type (employees or contingent workers).</li> <li>• Limit staffing for a position to a specific time type (full or part-time workers).</li> </ul>
<b>Pre-hire</b>	Used to identify individuals you're tracking prior to employment. Used in Recruiting to identify candidates who are in the Offer or Background Check stage. Pre-hires will be able to complete several pre-employment tasks in Workday.
<b>Staffing Event</b>	Any event that changes an employee's position or job; for example: a hire, transfer or promotion. Staffing events usually trigger an opportunity to change benefits elections.
<b>Change Job process</b>	Initiated by the receiving HRBP when an internal candidate has accepted an offer. This begins the transfer process.
<b>Activity Stream</b>	A feature where you have the ability to write notes and can direct a note to a specific individual within Williams by using the @ and searching for their name. Any notes posted within the activity stream are viewable by anyone with proper security access. This dialogue will show up resembling a chat listing.

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### RECRUITING AND ONBOARDING (Continued)

Workday Term	Workday Definition
<b>Primary Location</b>	Location where the position resides.
<b>Additional Locations</b>	Additional locations where the position may reside; and if the position is relocation eligible.
<b>Worker Record</b>	Employee data related to career, job, compensation, pay, benefits, time off, contact and personal information.

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