


Tagging Users and Commenting on Transactions

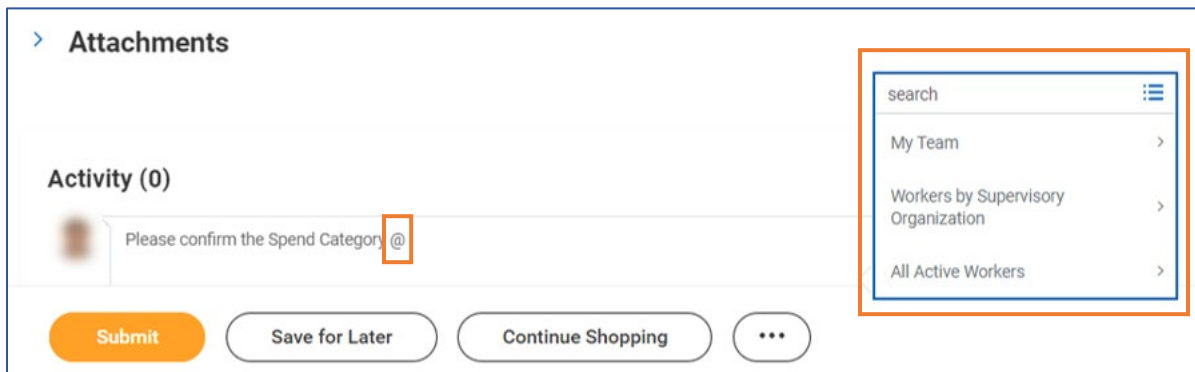
This Quick Reference Guide (QRG) is designed to walk employees through the process of adding, deleting, and viewing tags and comments on transactions in Workday. The tag and comment functionalities allow users who have access to certain objects (i.e. requisitions) or are involved in a transaction or business process (i.e., approvers) to communicate and collaborate with others.

 NOTE	Comments should NOT be used instead of an AskFinance ticket.
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Tagging Users on Transactions

The tagging functionality enables communication and collaboration between two or more people on a given transaction. The purpose of tagging is to increase visibility of certain elements of a transaction to the individual(s) who will be impacted.

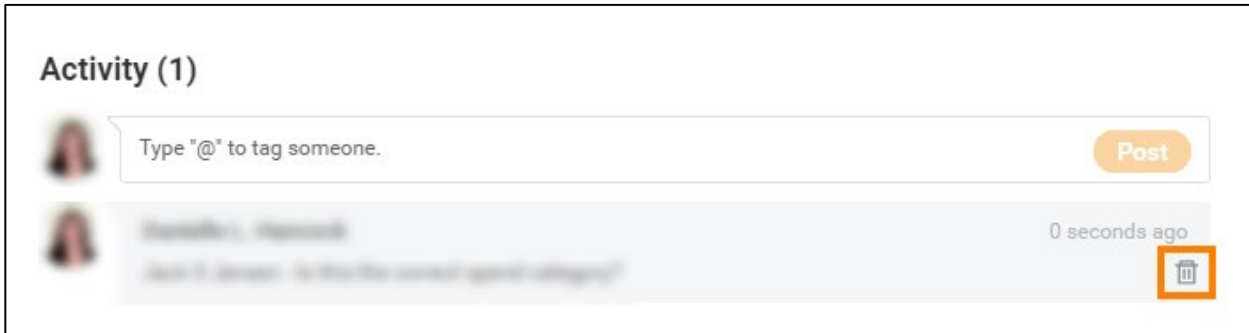
You can tag a user in the **Activity Stream** at the bottom of certain objects by typing @ in the **Activity** box and searching for their name. You may tag multiple users by repeating this process. Once you have tagged one or more users and added your comment, click **Post**. The user(s) you tag will receive a notification that they have been mentioned, or “tagged,” in a comment. This comment will be visible to everyone who has access to the object.



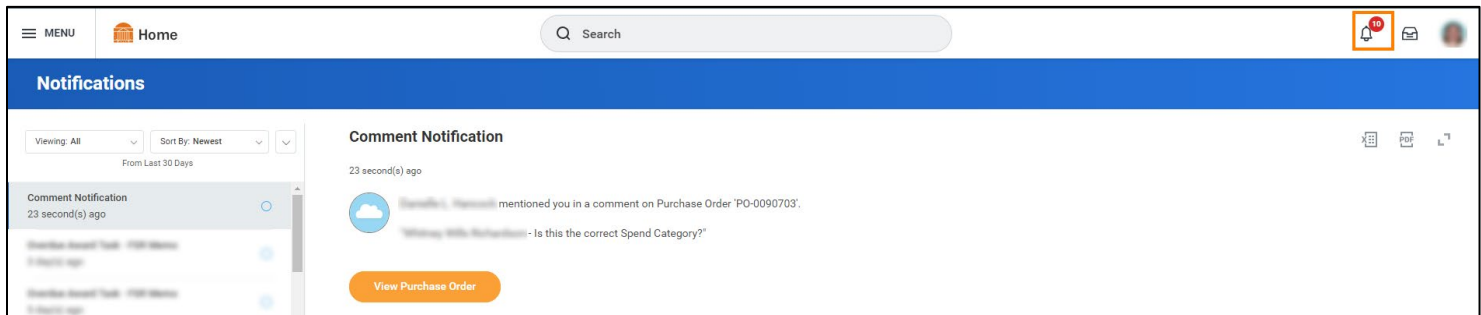
The **Activity Stream** displays the messages in reverse-chronological order (with the most recent at the top).

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You can delete a post you created by clicking the **Delete** icon (trash can) for that tag. Depending on your security role, you may not have the ability to delete certain posts.



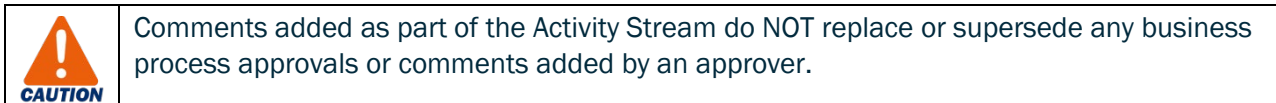
You can **view** a comment in which you have been tagged by navigating to your notifications, located in the upper righthand corner of the Workday Home screen, and selecting the relevant **Comment Notification**. If you tag a person who doesn't have security access to the object, Workday sends the notification without a link to the object.



Activity Streams are not available across all Workday Financials. We will continue to monitor future releases from Workday and enable them on other objects as the functionality becomes available.

The following objects allow tagging:

- | | |
|--------------------------------|-----------------------------|
| Customer | Requisitions |
| Gift | Supplier |
| Miscellaneous Payment Requests | Supplier Contract |
| Project | Supplier Invoice |
| Purchase Order | Supplier Invoice Adjustment |
| Purchase Order Change Order | Supplier Invoice Request |



Commenting on Business Process Steps

Unlike tagging, commenting is a functionality available on all business processes. Any user with a role on a given business process can view the comments on that business process and add comments of their own. Comments are added at the business process level (i.e., on business process approval steps) and can be seen in the business process' **process history**. For example, an approver/reviewer can make a comment for the next approver on a business process or, if denying the transaction, can add a comment and send it back to initiator.

The screenshot displays a user interface for commenting on a business process. At the top, there is a text input field with the placeholder text "enter your comment". Below this is a section titled "Process History" which lists two steps:

- Supplier Invoice Request Event- Step Completed (26 minutes ago)
- Approval by Payroll Settlement Specialist- Awaiting Action (Due 05/27/2022)

At the bottom of the interface, there are four buttons: "Approve" (highlighted in orange), "Send Back", "Add Approvers", and a menu icon (three dots).