## 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 are not deeply involved in a transaction or business process (i.e., approvers) to communicate and collaborate with those who are more involved.

## 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 transactions 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 transaction.
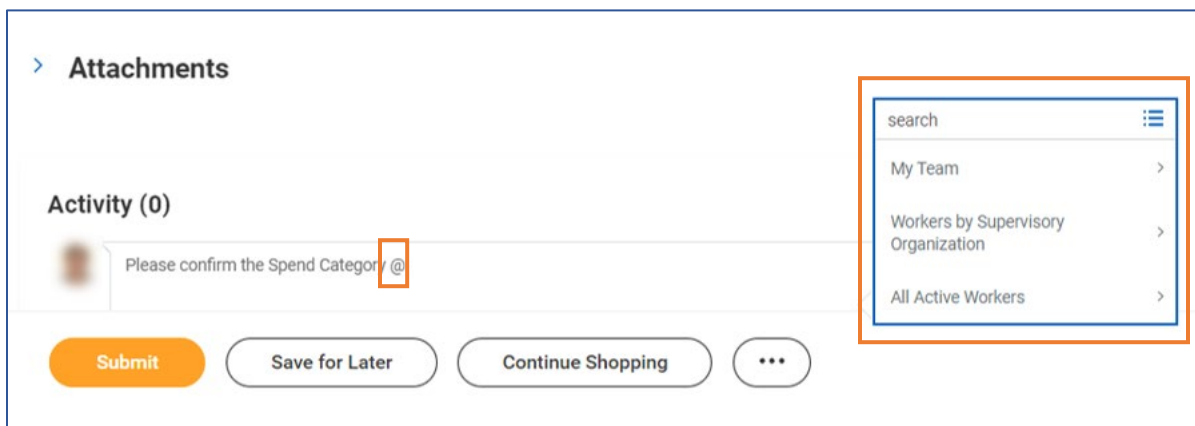


The thread (chain of comments) displays the messages in reverse-chronological order (with the most recent at the top).

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

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.**

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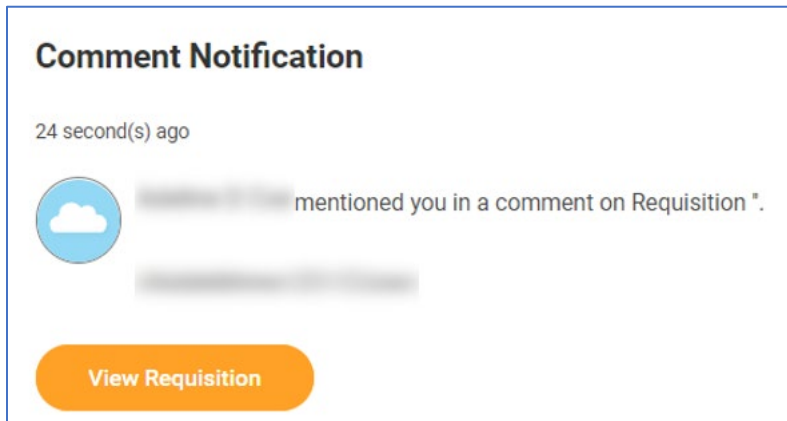


The following transactions (HCM and Finance) allow tagging:

- Compensation Review
- Create Supplier Invoice
- Goal Setting – Performance Management
- Goods Delivery Line
- Job Application
- Prospect – Recruitment
- Purchase Order
- Purchase Order Change Order
- Supplier Invoice Adjustment
- 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.

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Finance
Strategic
Transformation

enter your comment

**Process History**

Supplier Invoice Request Event– Step Completed

26 minutes ago

Approval by Payroll Settlement Specialist– Awaiting Action

Due 05/27/2022

Approve | Send Back | Add Approvers | ...