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.

Comments should NOT be used instead of an AskFinance ticket.

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).
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
- Gift
- Miscellaneous Payment Requests
- Project
- Purchase Order
- Purchase Order Change Order
- Requisitions
- Supplier
- Supplier Contract
- Supplier Invoice
- Supplier Invoice Adjustment
- Supplier Invoice Request

Comments added as part of the Activity Stream do NOT replace or supersede any business process approvals or comments added by an approver.
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.