Workday Navigation

This Quick Reference Guide (QRG) is designed to provide you with information to navigate and configure your preferences in Workday.

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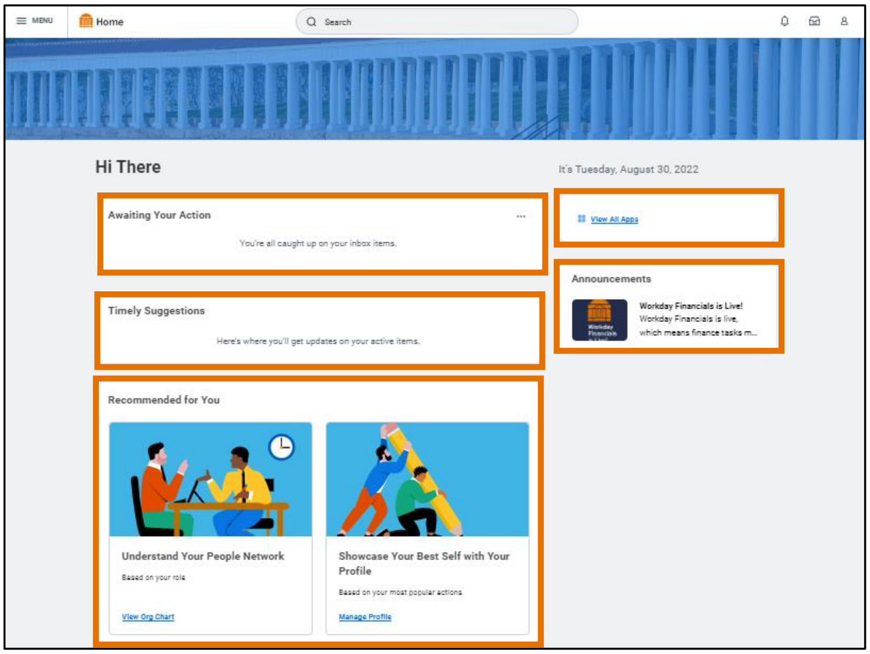
Workday Homepage

The **Workday Homepage** is broken up into 'Cards' or sections that will display based on your role. In addition to announcements and inbox items, Workday provides information to you in categories of: Timely Suggestions, My Team, and/or Recommended for You. From here, you can add, remove, and rearrange applications and shortcuts.

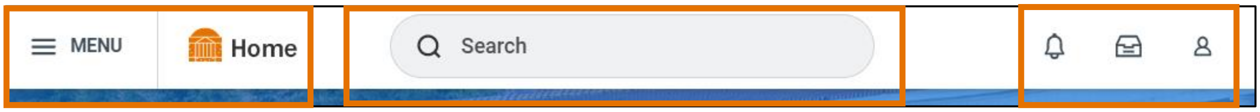


On the **Workday Home** screen:

1. The following cards are displayed:
   - **Actions Awaiting You** - This is your inbox section, now called Actions Awaiting You, that displays upcoming tasks, approvals, and To-Do's. If you have any items displayed, you can access your inbox through this section.
   - **Your Team** - This provides you with insight into your team, such as upcoming absences. Managers will also have visibility into a team member's upcoming birthday/work anniversary.
   - **Timely Suggestions** – This provides timely information, such as tax document (W-2) availability, required learning you may need to take, or reminders for un-expensed credit card transactions.
   - **Recommended for You** – This provides recommendations for you to consider, such as viewing your organization chart or a quick connection to your Worker Profile.
   - **View All Apps** – this is where you can access your applications and shortcuts in one place. You can easily view, add, and edit them from this option. *For more details on applications and shortcuts, navigate the Applications & Shortcuts section.*
   - **Announcements** – This provides you with timely information during unique moments throughout the year. Selecting individual announcements provides you with additional information regarding that announcement and often includes links to webpages/videos for relevant information.

Workday Toolbar

The Workday toolbar is a constant feature in Workday that will remain with you no matter where you are in the system.



From left to right, the toolbar consists of:

1. **Global Navigation Menu** – This menu provides an easy way to update your apps and shortcuts anywhere in Workday rather than having to return to the Workday Homepage. This offers the same functionality as the **View All Apps** section on your homepage; you can view, add, and edit your applications and shortcuts in one place. *For more details on apps and shortcuts, navigate to the Applications & Shortcuts section.*
2. **Home Button** - A quick and easy way to get back to your Workday Home screen, at any time.
3. **Search** - Enables you to easily access worklets, reports, and tasks via a simple search. The Workday interface is intuitive and will list the related tasks as soon as you type in a few words. *For more details on Workday search, navigate to the Search in Workday section.*
4. **Notifications** - Inform you, from the last 30 days, when certain tasks/processes are completed, or available for your review. Often, notifications will not require action, but should always be reviewed to keep you informed of the status of actions you've taken, or actions that regard you.
5. **My Tasks (Inbox)** - Includes all tasks that await your action as well as an Archive of all the tasks you've submitted/completed. You must take action to remove these items from your Inbox. F*or more details, navigate to the My Tasks (Inbox) section.*
6. **Account** - where you'll find your Worker Profile, Account Preferences, Favorites, Workday Drive, etc.

Search in Workday

Workday's search field is intuitive and predicts results, as you type. Workday also allows you to save and personalize your most used search categories (i.e., Saved Categories) to help filter results in order to find what you are looking for.

In the **Workday Search** field:

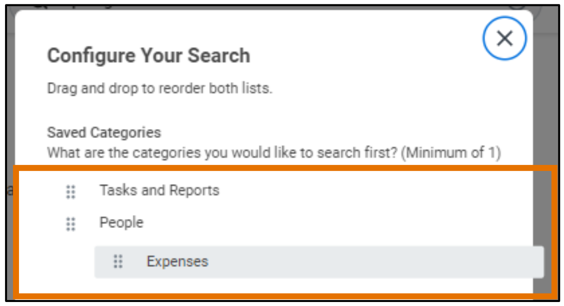
1. Type the information you wish to locate, e.g., a person's name, task, or a report name and press enter. You do not need to enter an entire name, task, or report.

From the **search results**:

2. You will see following sections display on the left-hand side:
   - **Saved Categories** – These are the categories you prefer your search results to display first. Workday will prioritize these categories when displaying your search results. By default, **People** and **Tasks and Reports** categories will be in this section.
   - **More Categories** – These are all the remaining categories that are hidden and do not immediately display results for that relevant area. You can expand or hide the list of categories by clicking the dropdown.

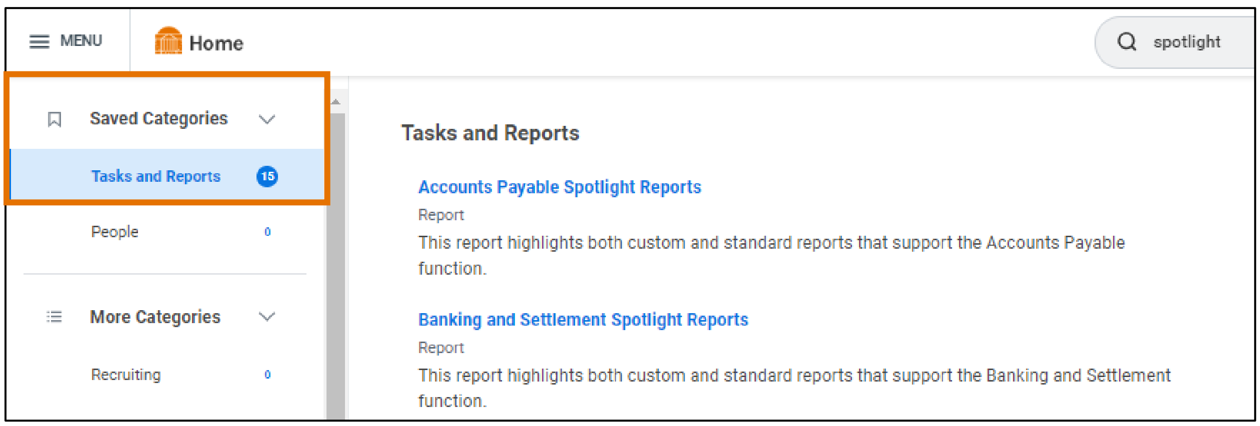
- **Configure Search** – This allows you to customize and configure what search categories are most important to you by adding or moving categories to the Saved and More Categories sections. You must have at least **1 category** in your Saved Categories section.

  To do this:
  - Click **Configure Search.**
  - Identify the **category** you would like to move.
  - Hold-down the click button to **drag & drop** it to the Saved or More Categories section. You can also re-order the way your categories are displayed.
  - Click **Save.**

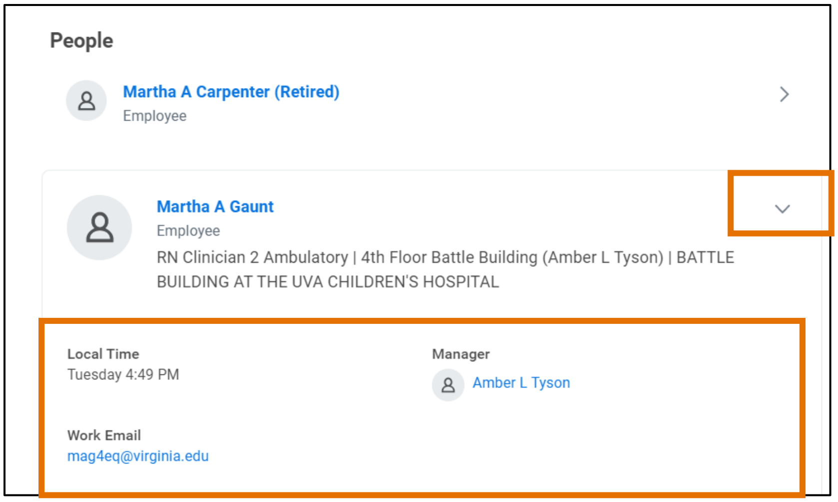


- **Search Tips** – These provide you with insight into how keywords can help expedite your search.

3. Navigate to the result that you would like to view. You can also click on the **dropdown** next to the **Saved Categories** and **More Categories** sections to identify more search results.
   - You will see a number display next to each category. This indicates the total amount of search results relevant to that category. Click on the category to view these specific results.

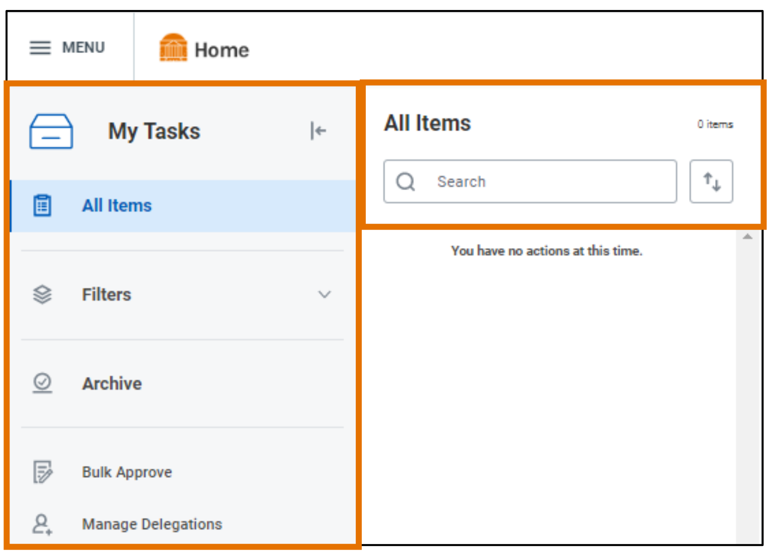


4. If you search an employee or student worker, you will also notice your search results will display a '**mini preview**' of their information such as their work email, work phone, and manager. To hide or display this information, click the **arrow icon** to expand or collapse this window.



My Tasks (Workday Inbox)

My Tasks is an enhanced view of your Workday Inbox includes all tasks, approvals, and to-dos that await your action as well as an Archive of all the tasks you have submitted/completed. You must take action to the items you receive from your inbox. To find things quickly, you can leverage the inbox search, filters, and sort options.



On the **Workday Home** screen:

1. Click the **inbox icon** next to your Profile from the toolbar.
2. You will see the following display on the left-hand side:
   - **All Items** – Click this tab to view your business process tasks, approvals and to-dos.
   - **Filters** – Click this to expand and apply any filters to your inbox items. To add, edit, or remove filters, click the **Manage Filters** option.

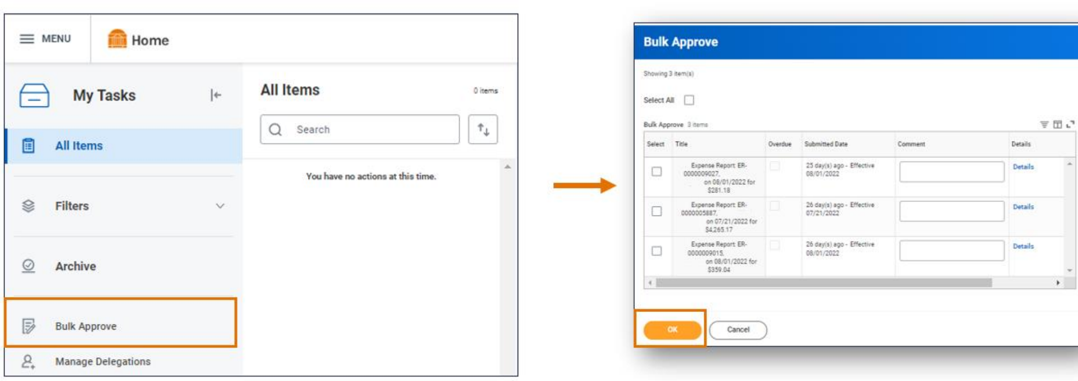
- **Archive** – Click this tab to find your submitted tasks that you initiated, approved, denied, or cancelled from the past 90 days. You may want to use this if you would like to view details or the process history of that task with ease.

NOTE	To view the archived Inbox items which are older than 90 days, use the regular Workday search and type **View More Processes** to run this report.

- **Inbox Search** – Type the task or name of the employee in the search and press enter. This will only display inbox items related to your search. For example, search '**Expense**' to view expense reports you need to review or approve. You can apply this in your **All Items** and **Archive** tabs.
- **Sort By and Display Density** – Next to the inbox search, click this button to sort your inbox items based on the given options such as **Newest on Top**, **Oldest on Top**, and **Due Soonest on Top.** The display density allows you show less information (such as effective date) in the inbox item preview. You can apply this in your **All Items** and **Archive** tabs.
- **Bulk Approve** – Click this to approve similar requests at once (in bulk). For example, an Expense Support Specialist might use the bulk approve to mass approve expense reports.

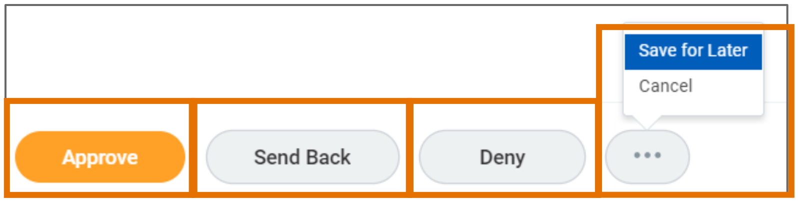
NOTE	Please Note that not all tasks in your inbox may be able to be bulk approved.

  - On the **Bulk Approve** screen, you have the option to select all available tasks or select specific ones. If you would like to view further details of that task, make sure to right click on Details and select **See in New Tab.** This is so you can view on a different screen without losing your place.



- **Manage Delegations** – Click this to set up or manage delegations from your inbox. Delegations are temporary reassignments of tasks to another person, enabling them to perform actions on your behalf. *For more details and step by step guidance, refer to the [Delegate Workday Transactions QRG](#).*

3. Click the **inbox item** that you want to review and take action on. *For more details on approving transactions, refer to the [Approve Workday Transactions QRG](#).*



- **Approve** – Approves a specific step in a business process then moves to the next step.
- **Deny** – Does not approve a request and immediately ends the business process.
- **Cancel** – Erases any changes you may have made to the request. The task remains in your Workday Inbox.
- **Save for Later** - Saves changes that have made to the request so that you can come back to it later. The task remains in your Workday Inbox.
- **Send Back** – Sends the current step back to a prior step. Can also be sent back to the initiation step.

NOTE

Employees will receive an Inbox notification if their task has been sent back and can review the reason by following the steps below:

1. Navigate to your Workday Inbox on your homepage.
2. Select the **Archive** tab and locate your submitted task that was sent back.
3. On the View Event screen, select the **Process** tab.
4. You can find the send back reason under the **Comment** column in the **Process History** table.

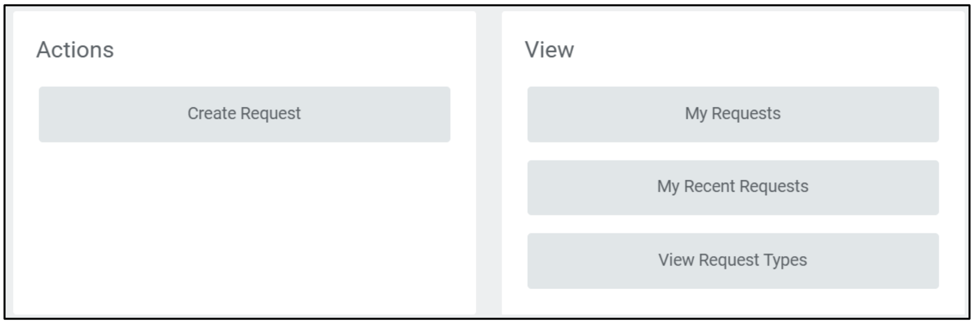
Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Step Completed	06/30/2022 01:50:08 PM		[illegible]	1	
Sent Back	07/06/2022 02:52:06 PM	07/02/2022	[illegible] (Investment Pool Manager)	1	Send Back Reason from [illegible] Test

NOTE

- Not all actions can be performed by all employees.
- **If you are an approver, remember to approve transactions** in a timely fashion. To view all tasks that you need to review or approve, you can run the report "Processes Awaiting My Action." The report shows what tasks you need to act on and how many days it has been since initiation.

Applications & Shortcuts

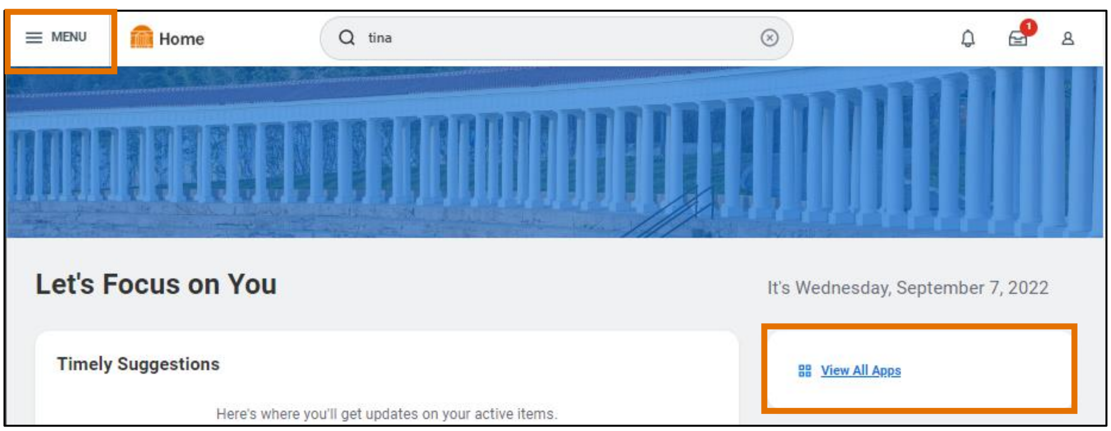
From the global navigation menu or Workday Homepage, you can view, add, or edit your applications and shortcuts in one place. **Applications** (or also known as Worklets) are displayed as an icon that provide an easy way to access tasks and information you regularly use. When clicking on an application, it will display the Actions and View sections. Buttons in the Actions section link to tasks you can perform. Buttons in the View section link to reports you can view. You can have up to **20 applications.**



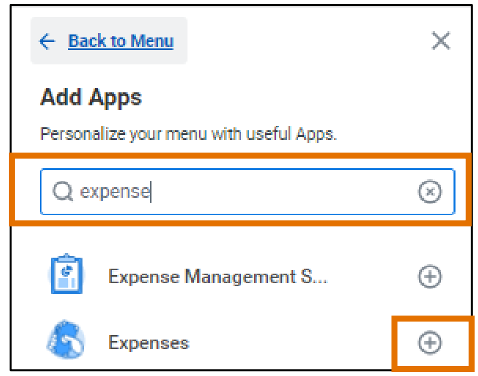
Shortcuts are items you can set up for yourself to act as quick connections to tasks/reports that you use or view regularly. When clicking on a shortcut, it will immediately run that task or report instead of typing it in the search bar. You can have up to **10 shortcuts.**

On the **Workday Home** screen:

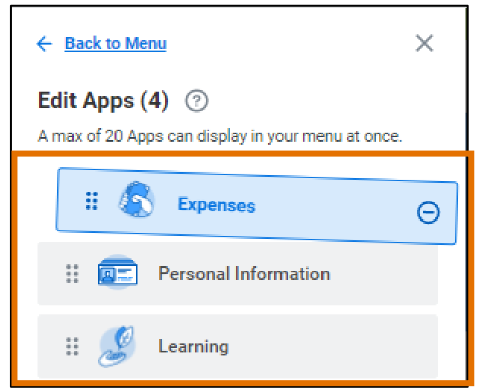
1. To view your applications and shortcuts:
   - Click **View All Apps** or the **Global Navigation Menu**.



2. To **add** an application or shortcut:
   - Navigate to the appropriate tab (**Apps** or **Shortcuts**).
   - On the tab, click the **Add Apps** or **Add Shortcuts** button.
   - In the menu search, type a key term or the name of the application or shortcut. For example, you might search '**Expense**' to add the '**Expenses**' application.
   - Click the **(+)** to add the app or shortcut.
   - To see these new changes, click **Back to Menu.**



3. To **edit** an application or shortcut:
   - Navigate to the appropriate tab (**Apps** or **Shortcuts**).
   - On the tab, click the **Edit** button.
   - Identify the app or shortcut you would like to edit.
   - If you would like to rearrange the order of how they are displayed, hold-down the click button to **drag & drop** it to where you want it placed.
   - If you would like to remove an app or shortcut, click the **(-)**. *Please Note: The (-) displays next to the apps or shortcuts that you can remove. Some applications are defaults that you cannot remove.*
   - Click **Save Changes.**



4. Once finished, click the **(x)** to close out the menu.

Errors, Alerts, & Related Actions

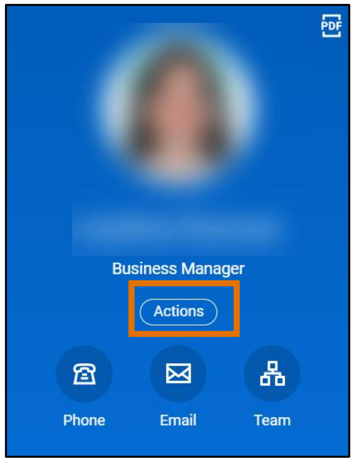
Error messages display in red. They typically identify specific fields where information is missing, entered incorrectly, or in conflict with a rule established by your organization. Select the message to view the error details. You cannot complete a task until you correct all errors.

Alerts display in orange. They notify you of potential problems on a page, but do not prevent you from completing the task. Select the alert message to view the location of missing or problematic information within the task, report, or business process.

Related Actions displays next to an object and can be used to access relevant actions. Most actions/options that are available through **Related Actions** can also be found through applications or the search field. The following are three common situations that you may find this button:

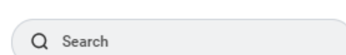
1. Related Actions may appear when hovering your cursor next to a business object or link.

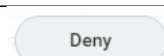
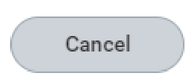
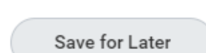
2. In your profile or other employee's profile page, you can access the Related Actions from the Actions button under the name.



3. You can also find Related Actions in task and report headers.

Common Workday Icons

Terminology	Definition	Icon
My Tasks (Inbox)	Similar to Gmail, view items in Workday that need your attention or action (e.g., approval), and sort/filter based on your personal needs!	
Workday Home	The Workday Home button will be on every screen in the upper left-hand corner. This can be clicked on any page within Workday to return home.	
Search Bar	A field on the home page that enables you to find tasks, reports, and people within your organization. Search allows you to narrow results by categories such as Saved & More Categories.	
Notifications	Notifications are all items you should be aware of in Workday.	

Global Navigation Menu	This button located in the upper left hand of your screen, allows you to view, add, and edit applications and shortcuts in one place. You may use apps and shortcuts for frequently visited reports or tasks.	
Calendar	Anytime this button appears, you may select it to bring up a calendar to quickly choose a date (or date range) for your search criteria.	
Error	Page error must be fixed before moving forward. Typically, this means your data is missing values or required fields.	
Alert	An Alert is a soft warning in Workday meant to bring attention to items not required to be fixed but potentially helpful to prevent future errors.	
Favorites	Favorite an item in your inbox for quick access later. Select the star icon to save the inbox item as a favorite.	
Sort Criteria	Using the sort button in your inbox, quickly sort for emails based on time sent, items favorited, or other predefined metrics.	
Custom Filters	Custom filters allow everyone to quickly find information based on their unique needs. Custom filters can be created by business processes, or even conditions.	
Process History	Allows a user to view details regarding each step that was completed, not required, or currently awaiting action. Also, you can view the status of historical requests.	
Approve	Approving a request advances it to the next step in the process or completes a business process. A business process is completed when indicated by the green checkmark.	
Deny	Denying a request terminates a business process. The request must be submitted again by the initiator.	
Cancel	Erases any changes you may have made to the request. The task remains in your Workday Inbox.	
Save for Later	Saves changes that have made to the request so that you can come back to it later. The task remains in your Workday Inbox.	

Add	Allows you the ability to add someone or something in the respective task.	
Required Field	A value must be input in a required field before you can Submit.	
Related Actions	Both icons reveal a menu of possible actions for a given task or function.	 
Dropdown List	Select this icon to reveal a dropdown list of items.	
Full Screen View	Select this icon to view a report in full screen viewing mode.	
Configure Options	Click to set preferences related to your current page.	
Export to Excel	This icon allows you to download and save a report as an Excel spreadsheet.	
Print	Select this icon to print a properly formatted version of the page you're viewing.	
Add	Various ways throughout the system to add an additional row or value.	
Delete	Click to delete a row or value.	
Process Successfully Completed	Process was successfully completed.	
Process Canceled	Indicates a business process has been canceled.