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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Navigate and Configure the Home screen

1. The Workday Home screen displays worklets/applications that provide access to tasks and reports. The Home screen is highly configurable. You can add, remove, and rearrange worklets on your Home screen.

   On the Workday Home screen:
   - Select the **Settings** icon in the upper-right Corner.
   - On the Configure Worklets screen, select add (+) to add a new worklet.
   - Select the worklet from the drop-down list.
   - Select the remove (-) to remove a worklet from the Home screen.
   - Select the arrows to reorder the worklets.
   - Select **OK** and **Done**.

2. Applications are organized into 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.
3. 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.

4. 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.

5. Related Actions menu displays next to an object and can be used to access relevant actions. Most actions available through Related Actions are also available through applications or the Search field. Following are the three common types of Related Actions:

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

   - In your worker Profile header, you can access your Related Actions from the Actions button under your name.

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

6. The Announcements section provides you with timely information during unique moments throughout the year. Selecting individual announcements provides you with additional information regarding that particular 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.

1. **Home Button** - a quick and easy way to get back to your Workday Home screen, at any time.
2. **Search field** - enables you to easily access worklets, reports, and task via a simple search. Workday interface is intuitive and will list the related tasks as soon as you type in a few words.
3. **Shortcuts** - your connection to your most frequently used tasks, reports, and/or links. You can have up to 10 shortcuts configured.
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. **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.
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 begins to filter your request and offers several of the most common search results in the drop-down menu.

In the Search field:

1. Enter information you wish to locate, e.g., a person’s name, task, or a report name. You do not need to enter an entire name, task, or report.

2. Select one of the results from the drop-down list to display the full search results on a new page. The search results will only provide viewable information per your security level. Search allows you to narrow results by categories including Common, Organizations, and All of Workday. It also allows you to filter results by specified criteria.

Workday Inbox

Workday Inbox includes all tasks, approvals, To-Dos that await your action as well as an Archive of all the tasks you have submitted/completed. You must take action to remove these items from your Inbox.

1. View Your Inbox.

On the Workday Home screen:

- Select the Inbox icon next to your Profile icon.

- Select the Actions tab to view your business process tasks, approvals and to-dos.
- Select the Archive tab to access the status of any business process. All historical actions remain in Workday indefinitely.
- You can use the Viewing drop-down to filter action items based on the given options. The Edit Filters option is available for both Actions and Archive tabs.
• You can use the Sort By drop-down to sort the action items based on the given options. The sort option is available for both Actions and Archive tabs.
• Select the drop-down next to the Sort By drop-down to Bulk Approve action items, Refresh, or to view and manage My Delegations.

To view the archived Inbox items which are older than 30 days, select the drop-down arrow next to the Sort By drop-down and select View More Processes.

2. Taking Action on Inbox Items.
• 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.

Not all actions can be performed by all employees.
A Worklet is a compact report displayed as an icon (a tile or a bubble) on your homepage, providing easy access to tasks and information that you use regularly. A few Required Worklets will be available under My Most Used Apps in Workday based on your role. Apart from these worklets, you can also add/remove Additional Worklets based on your requirement.

1. Access Worklets.

On the Workday Home screen:

- Select the Quick Access icon.
- Select the required worklet from My Most Used Apps.
- To view more worklets, select View All.

2. Configure Worklets.

There may be scenarios where a task does not route to your Inbox but appears in a specific Worklet instead. For example, the Account Certification tasks appear in the Account Certification – Awaiting Me Worklet.

In such cases you need to bring these Worklets on your Home screen for easy access. To do the same follow the below steps:

On the Workday Home screen:

- Select the Settings icon in the upper-right corner.
On the Configure Worklets screen:

- Select add (+) to add a new worklet.
- Select the worklet from the drop-down list.
- Select the remove (-) to remove a worklet from the Home screen.
- Select the arrows to reorder the worklets.
- Select OK and Done.

### Delegate your Inbox

The Delegation functionality in Workday allows another team member to act on your behalf. This functionality is useful in situations such as, when you are on vacation, expecting to be away from work etc. In such situations, you may delegate a specific task or action item to another peer or superior.

1. **Accessing Delegations.**

On the Workday Home screen:

- Select the **Inbox** icon to access the Inbox.

On the Inbox screen:

- Select the **Actions** tab.
- Select the **Down Arrow** icon located to the right of the Sort By drop-down list.
- Select **My Delegations**.
On the My Delegations screen:

- To manage your delegations, select **Manage Delegations**.

2. **Managing Delegations**, 
   - Select the **Manage Delegations** button on the My Delegations screen and perform the steps below:

On the Manage Delegations screen:

- Enter the **Begin Date** and **End Date** for the delegation. You can set the **Begin Date** as the current date or a future date. You cannot back date your delegations.
- Select a user to delegate your tasks to in the **Delegate** field. You can only delegate action items to a peer or a superior. You cannot delegate downward.
- Select whether to delegate all business processes, specific business processes, or none of the above in the Do Inbox Tasks On My Behalf column.
- Select the **Retain Access to Delegated Tasks in Inbox** checkbox to view and modify Inbox. Selecting this checkbox will allow you to access the delegated tasks from your Inbox.
- If required, add comments in the **enter your comment** field.
- You may select **Business Processes allowed for Delegation** to select the business processes for delegation.
- Select **Submit**.
If your team member (subordinate) has submitted a delegation, it will come to you for approval. If you create and submit a delegation, it will route to your manager for approval.

View Current Task Delegations and Delegation History

Workday allows you to access and view your Current Task Delegations and Delegation History. This means that you can review details of the tasks such as business process, subject, due date, etc.

1. Viewing Current Task Delegations.

On the My Delegations page:

- Select the **Current Task Delegations** tab.

2. Viewing Delegation History.

On the My Delegations page:

- Select the **Delegation History** tab.


On the My Delegations page:

- Select the **Delegated Tasks** tab.


On the My Delegations page:

- Select **View More Delegated Tasks**, at the bottom left of Delegated Tasks tab.
- Select a **Start date**.
- Select an **End date**.
- Select **OK**.


On the My Delegations page:

- Select the **Business Processes allowed for Delegation** tab.

A list of Business Processes allowed for Delegation displays.
## Common Workday Icons

<table>
<thead>
<tr>
<th>Terminology</th>
<th>Definition</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbox</td>
<td>Similar to Gmail, view items in Workday that need your attention or action (e.g., approval), and sort/filter based on your personal needs!</td>
<td></td>
</tr>
<tr>
<td>Workday Home</td>
<td>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.</td>
<td>![Home icon]</td>
</tr>
<tr>
<td>Search Bar</td>
<td>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 including Common, Organizations, and All of Workday. Search also allows you to filter results by specified criteria.</td>
<td>![Search bar icon]</td>
</tr>
<tr>
<td>Notifications</td>
<td>Notifications are all items you should be aware of in Workday.</td>
<td>![Notification icon]</td>
</tr>
<tr>
<td>Quick Access</td>
<td>This button located in the upper right hand of your screen, allows each person to customize their profile to their unique needs and add My Shortcuts. A few examples would be frequently visited reports or tasks.</td>
<td>![Quick access icon]</td>
</tr>
<tr>
<td>Calendar</td>
<td>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.</td>
<td>![Calendar icon]</td>
</tr>
<tr>
<td>Error</td>
<td>Page error must be fixed before moving forward. Typically, this means your data is missing values or required fields.</td>
<td>![Error icon]</td>
</tr>
<tr>
<td>Alert</td>
<td>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.</td>
<td>![Alert icon]</td>
</tr>
<tr>
<td>Favorites</td>
<td>Favorite an item in your inbox for quick access later. Select the star icon to save the inbox item as a favorite.</td>
<td>![Star icon]</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td>Image</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------</td>
</tr>
<tr>
<td><strong>Sort Criteria</strong></td>
<td>Using the sort button in your inbox, quickly sort for emails based on time sent, items favorited, or other predefined metrics.</td>
<td></td>
</tr>
<tr>
<td><strong>Custom Filters</strong></td>
<td>Custom filters allows everyone to quickly find information based on their unique needs. Custom filters can be created by business processes, or even conditions.</td>
<td></td>
</tr>
<tr>
<td><strong>Process History</strong></td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td><strong>Approve</strong></td>
<td>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.</td>
<td><img src="image" alt="Approve" /></td>
</tr>
<tr>
<td><strong>Deny</strong></td>
<td>Denying a request terminates a business process. The request must be submitted again by the initiator.</td>
<td><img src="image" alt="Deny" /></td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>Erases any changes you may have made to the request. The task remains in your Workday Inbox.</td>
<td><img src="image" alt="Cancel" /></td>
</tr>
<tr>
<td><strong>Save for Later</strong></td>
<td>Saves changes that have made to the request so that you can come back to it later. The task remains in your Workday Inbox.</td>
<td><img src="image" alt="Save for Later" /></td>
</tr>
<tr>
<td><strong>Add</strong></td>
<td>Allows you the ability to add someone or something in the respective task.</td>
<td><img src="image" alt="Add" /></td>
</tr>
<tr>
<td><strong>Required Field</strong></td>
<td>A value must be input in a required field before you can Submit.</td>
<td><img src="image" alt="Required Field" /></td>
</tr>
<tr>
<td><strong>Related Actions</strong></td>
<td>Both icons reveal a menu of possible actions for a given task or function.</td>
<td><img src="image" alt="Related Actions" /></td>
</tr>
<tr>
<td><strong>Dropdown List</strong></td>
<td>Select this icon to reveal a dropdown list of items.</td>
<td><img src="image" alt="Dropdown List" /></td>
</tr>
<tr>
<td><strong>Full Screen View</strong></td>
<td>Select this icon to view a report in full screen viewing mode.</td>
<td><img src="image" alt="Full Screen View" /></td>
</tr>
<tr>
<td><strong>Configure Options</strong></td>
<td>Click to set preferences related to your current page.</td>
<td><img src="image" alt="Configure Options" /></td>
</tr>
<tr>
<td><strong>Export to Excel</strong></td>
<td>This icon allows you to download and save a report as an Excel spreadsheet.</td>
<td><img src="image" alt="Export to Excel" /></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Print</td>
<td>Select this icon to print a properly formatted version of the page you’re viewing.</td>
<td></td>
</tr>
<tr>
<td>Add</td>
<td>Various ways throughout the system to add an additional row or value.</td>
<td></td>
</tr>
<tr>
<td>Delete</td>
<td>Click to delete a row or value.</td>
<td></td>
</tr>
<tr>
<td>Process Successfully Completed</td>
<td>Process was successfully completed.</td>
<td></td>
</tr>
<tr>
<td>Process Canceled</td>
<td>Indicates a business process has been canceled.</td>
<td></td>
</tr>
</tbody>
</table>