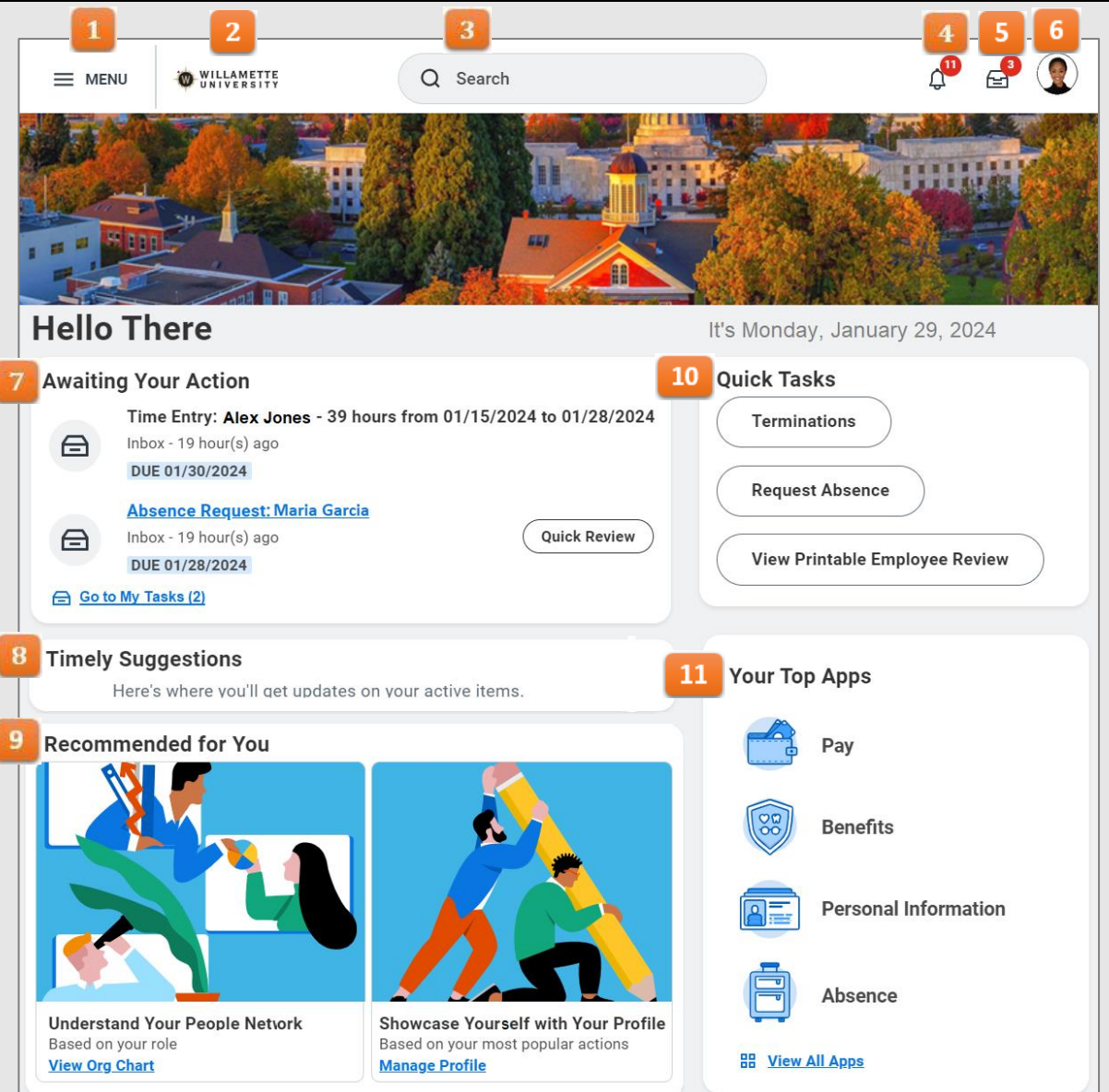workday.

Home Page Navigation Features

This guide will introduce you to the basic Workday navigation. You will be provided with an overview of the home page followed by further description of key navigational features in the following pages.

Home Page Key

1. **Menu:** Opens a menu displaying the apps assigned to you.

2. **Willamette University Icon:** Brings you back to the home page.

3. **Search Bar:** Find people, business processes and reports using this tool.

4. **Notifications:** Description of task-related actions and their disposition.

5. **My Tasks Inbox:** A link to your inbox with a list of your most recent tasks or activities assigned.

6. **Profile:** Opens a menu to commonly used functions in Workday. The menu includes a button to view your worker profile as well as common links used, such as favorites, a sitemap, and a workbench where pending activities and tasks will be listed.

7. **Awaiting Your Action:** A link to your inbox with a list of your most recent tasks or activities assigned.

8. **Timely Suggestions:** Upcoming tasks or activities you might want to complete.

9. **Recommended for You:** Workday suggested activities for you to perform.

10. **Quick Tasks:** Frequently used tasks used by you.

11. **Your Top Apps:** Workday will list the apps that you use most frequently.

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Menu Navigation

The navigation menu offers a selection of the major functions in Workday to choose from. Many of the sections contain subsequent menus divided into actions you can take and the ability to view the information contained in the section in a variety of ways. Most employees will have the following menu items:

Menu
Apps   Shortcuts

Your Saved Order

	Available to Most Employees.
Pay	• View payslips, tax documents, compensation history • Withholding elections (W-4) • Payment elections (direct deposit and Wisely card)
Benefits	• View benefit elections • Change benefit elections and retirement savings • Add/change dependents and beneficiaries
Personal Information	• Change contact information (address, phone, email, etc.) • Update emergency contacts • Change legal name or preferred name
Time	• Manually enter time in/out or use time clock to track time worked • Hourly employees only
Absence	• View time off balances and request history • Enter time off requests • Enter intermittent leave of absence days off
Learning	• Take digital compliance courses • Review transcript of learning history
Career	• Find jobs through internal job postings • Review candidates to a job posting • View and update your education and skills
Directory	• View employee directory, org charts, and co-workers on your team
Favorites	• View favorite pages and reports
Safety	• Report and view safety incidents

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Menu **Apps** **Shortcuts** Your Saved Order	Available to Supervisors
My Team	Supervisors can transfer, promote or change jobs for employees from this menu item. The can also add a job, end a job, and enter or correct an absence. They can also enter terminations.
Team Time	Supervisors can review and approve time, and enter time on behalf of a team member here.
Team Absence	A calendar showing team member absences can be viewed here. Supervisors can also enter absences on behalf of team members in this location.
Recruiting	Supervisors can view open and historical requisitions, and move candidates through the phases of applicant to hire.

My Tasks Inbox

My Tasks allows you to filter, organize and manage your tasks and delegations in one location. The collapsible navigation panel has traditional inbox features such as custom filtering and sorting functionality.

1.	From the home page, click on **Go to My Tasks**. You can also access My Tasks from the mail icon in the upper right corner.	**Let's Get Started** **Awaiting Your Action** **Time Entry: Alex Jones** - 39 hours from 01/15/2024 to 01/28/2024 Inbox - 19 hour(s) ago **DUE 01/30/2024** **Absence Request: Maria Garcia** Inbox - 19 hour(s) ago **DUE 01/28/2024** Go to My Tasks (2)
2.	There is a column to the left of the list of tasks containing a number of functions, along with a search bar at the top of the list of tasks. If desired, you can also collapse the Navigation panel to maximize screen space by clicking on the collapse button.	**My Tasks** |← **All Items** All Items 🔍 Search: All Items ↑↓ Saved Searches ⌄ ⚙ Advanced Search Filters ⌄ Archive Time Entry: **Alex Jones** - 39 hours from 01/15/2024 to 01/28/2024 19 hour(s) ago - Due 01/30/2024; Effective 01/28/2024 ☆ Bulk Approve Absence Request: **Maria Garcia** 19 hour(s) ago - Due 01/28/2024; Effective Manage Delegations 01/19/2024 ☆

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workday.

3.	Search task titles in All Items, Archives, and Filters to find and act on tasks more efficiently.

All Items

Search: All Items   ↑↓

⠿ **Advanced Search**
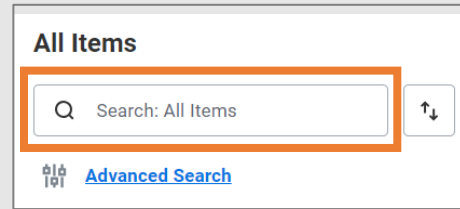
4.	You can sort and organize your tasks as you see fit. You can choose between two different views of your tasks using the **Display Density** options. The Simple view enables you to browse quickly through task titles, while the Detailed view provides additional information on each task.

All Items

Search: All Items   ↑↓

⠿ **Advanced Search**

Sort By

Newest on Top ✓

Oldest on Top

Due Soonest on Top

Display Density

Simple

Detailed ✓

Date View

Absolute ✓

Relative
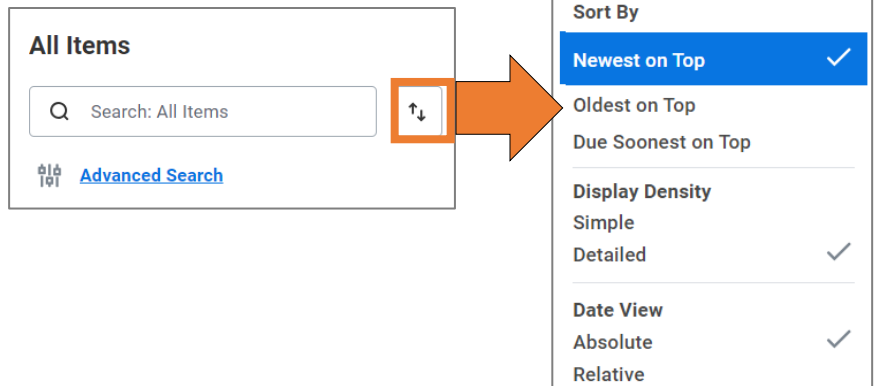
5.	Used the **Advanced Search** option to search using additional Task and Date range parameters, making it even easier to find specific tasks. You can click in the Assignment, Type, and Date Type fields to further filter your search results.

All Items

Search: All Items

⠿ **Advanced Search**

Advanced Search

Parameters

Assignment   select one ▼

Type   ☰

Step   ☰

Date Range

Date Type   ☰

Start   MM/DD/YYYY 📅

End   MM/DD/YYYY 📅

Search   Cancel

Assignment   select one ▼

select one

Assigned Only to Me

Assigned to Multiple People

Delegated to Me

Type Search

○ Background Check

○ Change Organization Assignments for Worker

○ Enter Time

○ Hire

○ Offer

○ Onboarding

○ Created Date

○ Due Date

○ Effective Date

Date Type   Search

| 6.	Use **Saved Searches** to automatically organize all tasks with matching search criteria. Once you run and save a search, it's added to your Saved Searches list for easy access.

📥 **My Tasks** ⊩

📋 **All Items**

🕐 **Saved Searches** ⌄

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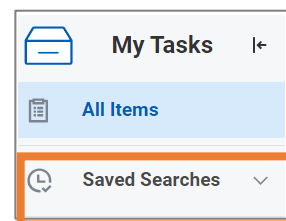
View Profiles

To access your own profile, click on the picture on the top right-hand of the screen next to your name and select **View Profile** from the drop-down menu. Your work information will display.
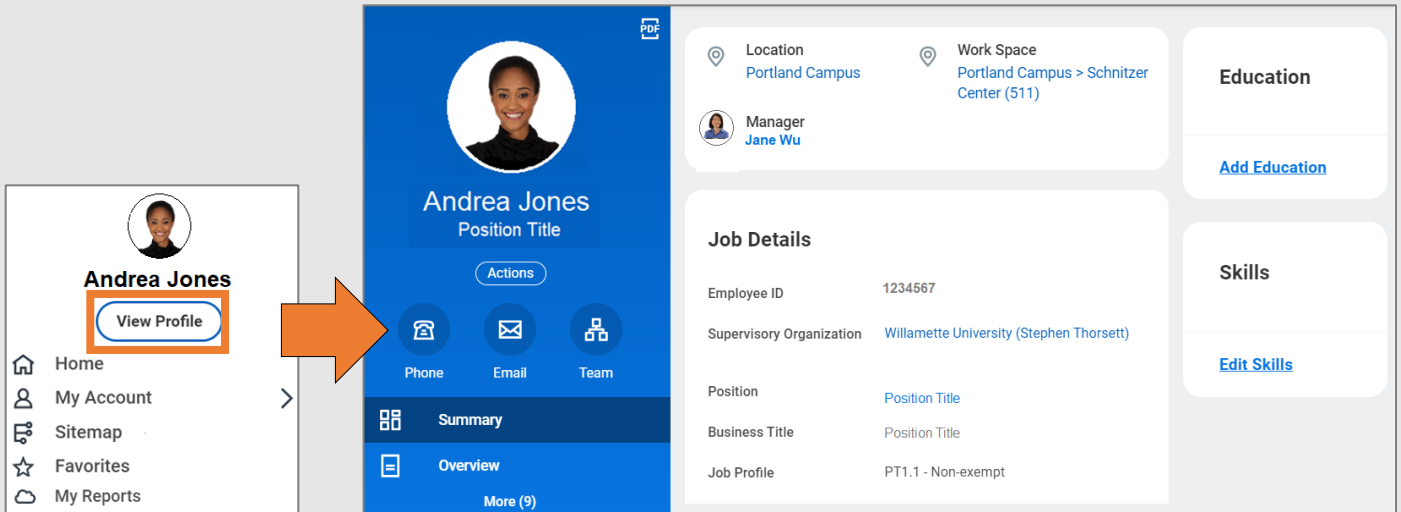
You can also view the profiles of other employees. Enter the employee name in the search bar and click on the appropriate name from the resulting list. Note that your Workday permissions will determine how much information you see for each employee. For example, a supervisor could see salary information about an employee while this information would not be visible to a co-worker.

The Action Button

Underneath an employee's picture, name and job title is a button labeled **Actions.** This button produces a menu that allows employees and their supervisor to perform a number of actions. Many of these actions can also be found in the topics listed in the menu described earlier, but can be faster to access here.

The menu is divided into two sections. The fist section lists actions that you have used frequently. Below Frequently Used is a full list of action categories that will in turn open to sub-menus listing actions that can be taken.

The action button on your personal profile will display activities related to you. Your supervisor will have actions related to managing employees.

Sample Supervisor View of Actions