

# Workday Tools and Navigation

## On this Job Aid:

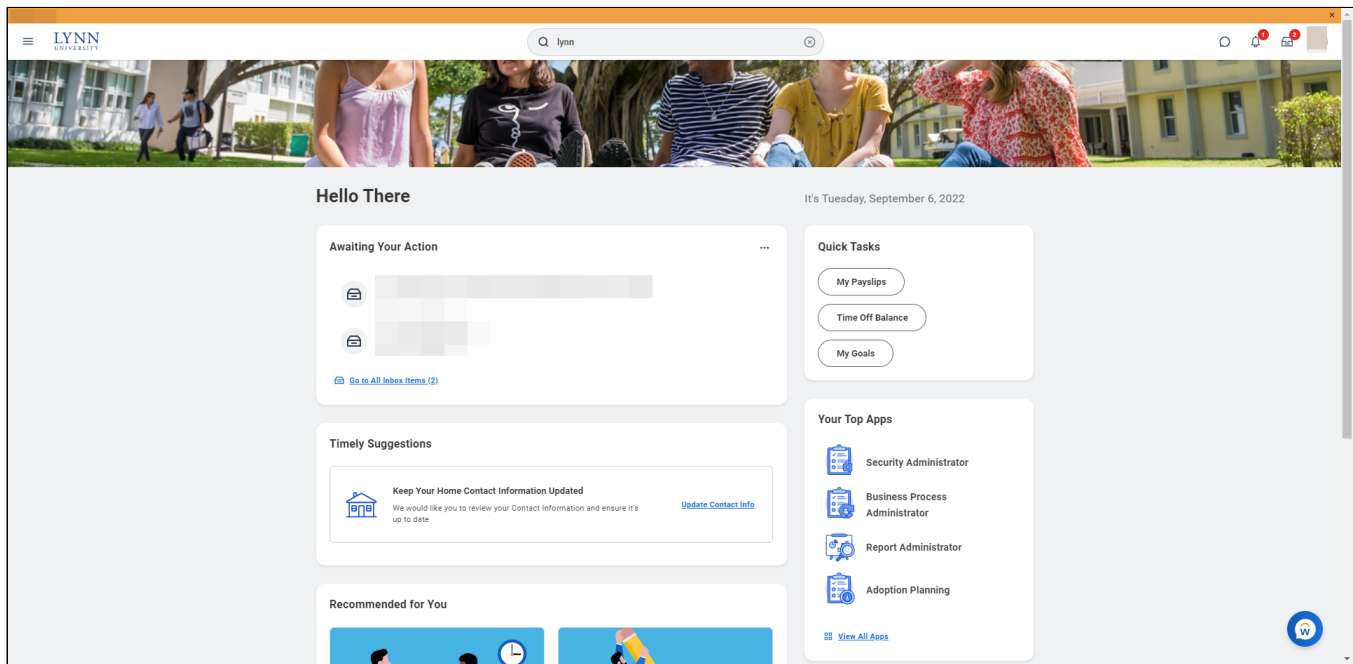
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### Note:

Worklets on the Home page are referred to as applications (apps).

## Navigate the Home Page

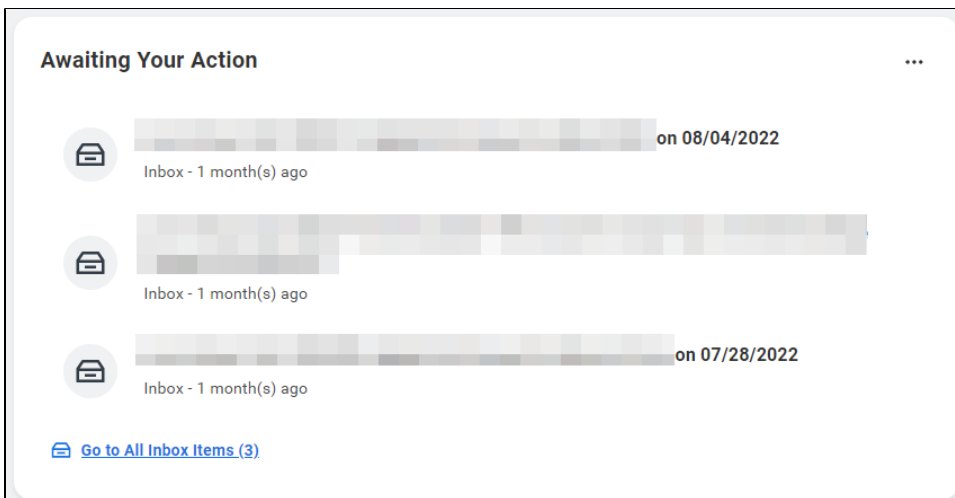
The Workday Home page displays applications that provide access to tasks and reports. The Home page is highly configurable depending on your role.



## Homepage

Workday presents information in several cards on the landing page:


- **Awaiting your action**, It displays the top three items on your inbox. To access your inbox, you can click on the link "Go to all Inbox Items" beneath the list or the inbox icon on the top right of your screen.



## Timely suggestions

Employee-specific suggested action items.

### Timely Suggestions



#### Keep Your Home Contact Information Updated

We would like you to review your Contact Information and ensure it's up to date

[Update Contact Info](#)

### Quick tasks

Provides links to the three tasks a user accesses regularly. Click on the "View all apps" option beneath the three opens to the entire list of apps. See also [global navigation panel](#).

### Quick Tasks

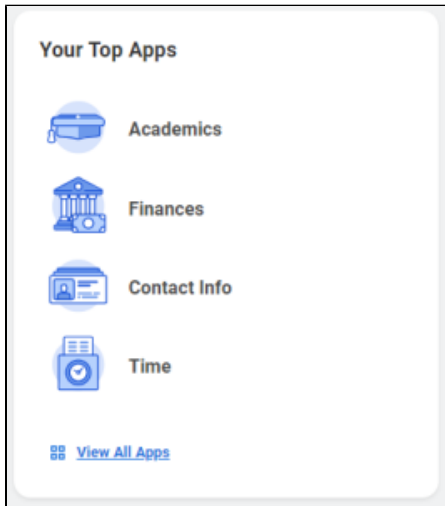
My Payslips

Time Off Balance

My Goals

### Your Top Apps

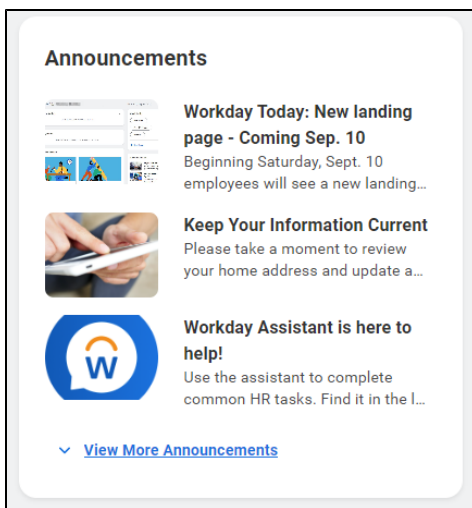
Your top 4 apps to display on your home page.



! You can quickly find all your Workday Apps by clicking the **View All Apps** link as shown below.

## Announcements

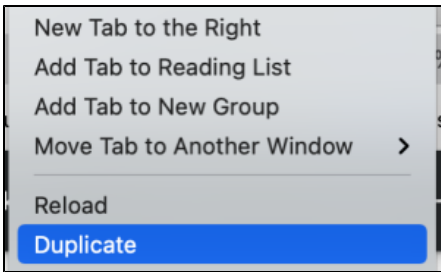
The Lynn announcements moves lower on the page.



## Using duplicate browser tabs

At times, users might look up something in workday without losing the current position in the Workday system (e.g. students or advisors searching for courses while registering). Users can do this by creating a duplicate tab on the browser that will allows two copies of Workday real-time open for students to flip back and forth two pages if needed. When done, simply close the duplicate tab on the browser.

Right click the Workday tab on your browser and select Duplicate from the shortcut menu.



To close the duplicate Workday Tab, click the "x" on the browser tab.

## Home Button

Click the Lynn logo to go back to the main page for users, regardless of where they are in the Workday system. You may use your browser back arrow to go back to the previous screen.

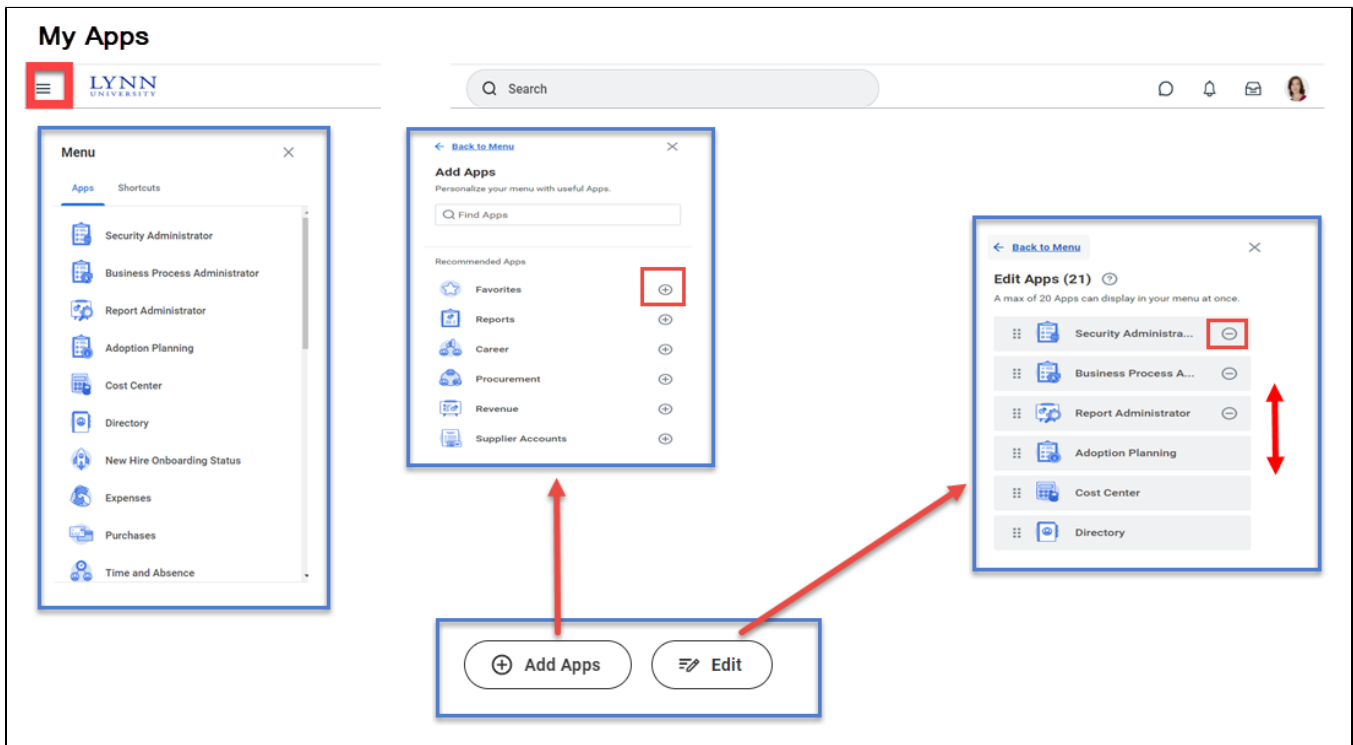
## Global navigation panel (Menu)

Access the new global navigation panel by selecting the 3 lines to the left of the Lynn logo. The panel will list all Workday's applications and shortcuts formerly displayed as icons on the landing page. The global navigation panel is on every Workday page, not just the landing page. Employees who use Workday's shortcuts option (the foursquare icon) or configure applications option (cog icon) will find those options in the global navigation panel. Shortcuts set previously in Workday will show up in this panel after Sep. 11.

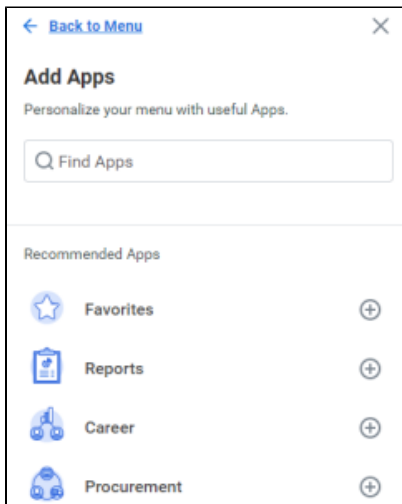


## My Applications (Apps)

Applications Worklets are icon made to quickly open / view shortcuts for tasks and reports. Depending on the employee or student role, the list of applications will vary. However, there is a 20-application limit that can be in display.



## Managing Applications



To Add, Rearrange and Delete your Apps:

To Add press "Add Apps" and type the name of the App or keyboard on the search bar. To save changes and results, click the plus sign to add and then click save changes.

To Rearrange press "Edit" then drag the app to the new location. Press Save Changes to save the new order of the Apps.

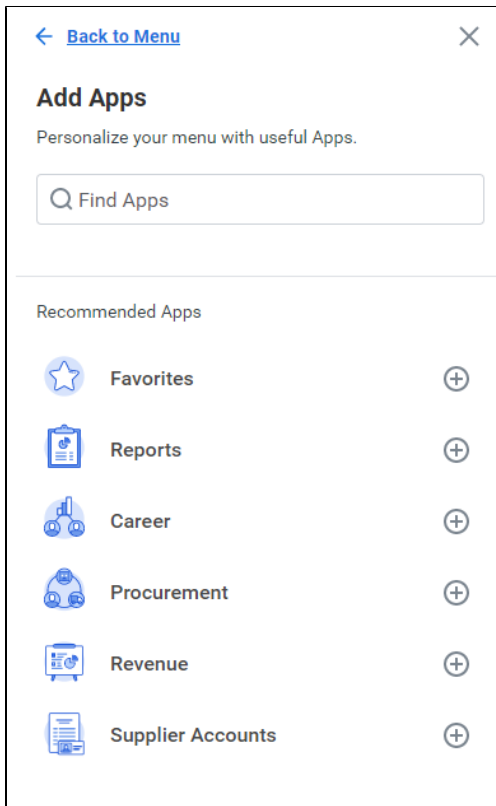
To Delete press "Edit" then the minus icon besides the app. Click Save Changes when finished.

## Edit order of your Top Apps

Select **Edit**

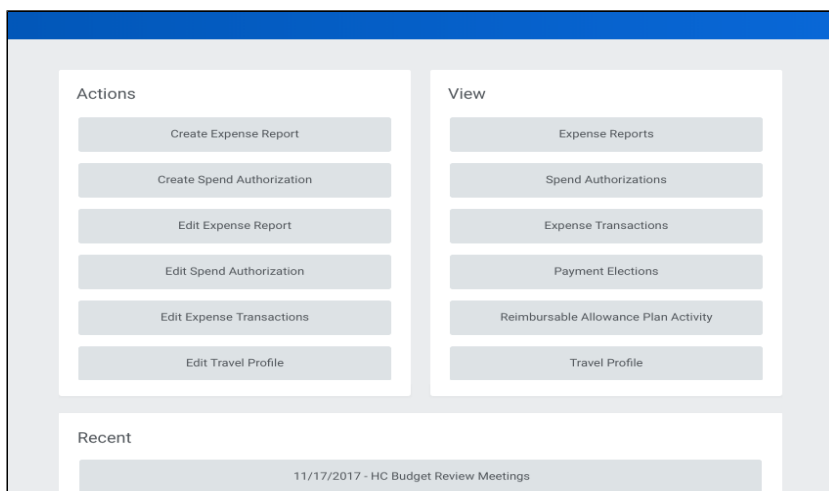
**Click + sign** to add apps.

**Click and drag apps** to rearranged them.



## Applications Layout

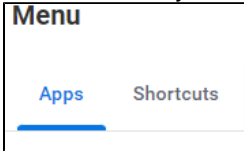
Applications are most commonly organized into Actions and View sections. Buttons in the Actions section link to tasks you can perform. Buttons in the View section link to reports you can view.



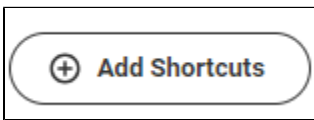
## Shortcuts

Shortcuts are a quicker way to find tasks and reports. There is a 10 shortcuts limit on display. (Suggested shortcuts students may be interested in creating: *View my Enrolled course*, *View my Academic Progress*, *View My Academic Report*, *View my Action Items*, *View my Grades* and *View Statement*.)

Under Workday Global Navigation Menu press the Shortcuts tab



Press button to add specific shortcuts on the Shortcuts tab.




From Find Shortcuts search, type as an example - *View My Courses*





Press the + button to add the shortcut to the Menu.

Press  to return to the shortcut list (to run to the shortcut simply click the link).

## Manage Shortcuts

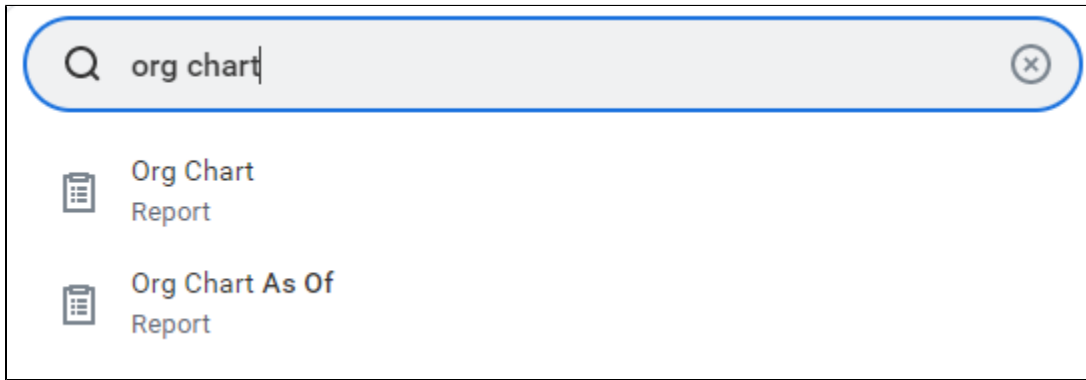
To Rearrange, press  then drag the shortcuts to the new location wanted. Press Save changes to save the new order.

To Delete, press  and then the  besides the shortcut. Press Save changes when finished.

## Enhanced Search

Workday makes it easy to search for people, tasks, reports, and business data using the Search field.

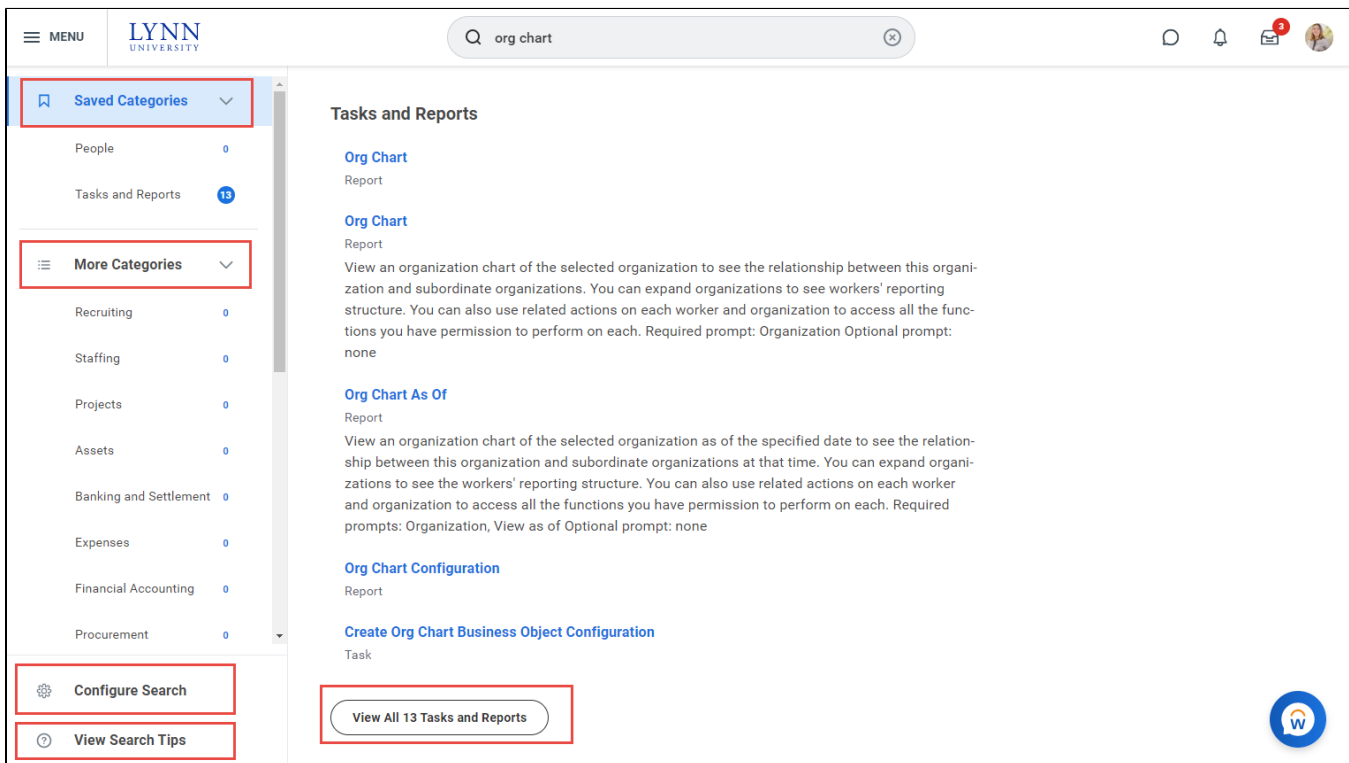




Keep in mind that searches find exact matches. If you misspell the search text, you will likely see no results. Workday Search also favors complete word matches over partial word matches, so that search results match the term you enter more closely. If you search using partial names or terms, the results may not display partial matches, depending on data volume. For example, if you search for “Alex,” the results may not display the name “Alexander.”

Though complete word matches are favorable, you can also use a partial search to find what you are looking for. For example, if you are searching for the Maintain Candidate List Assignment task, you can use the search string “**main can lis**.” This method is still effective, but may not be a best practice for all types of search where there may be multiple results returned.

Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the Search field.



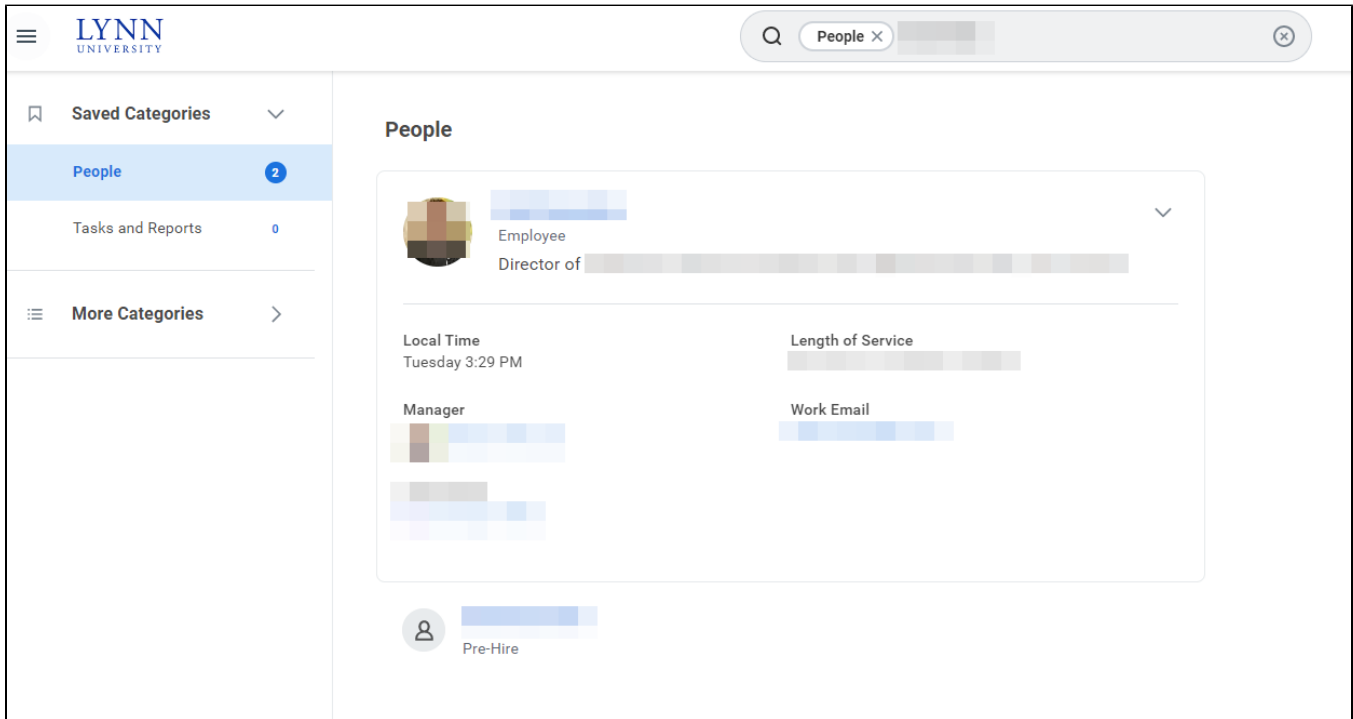
## People Search

You can quickly lookup staff/faculty/students in global search. The employee directory is available to all Lynn Workday users. Only students that elected to make their information "public" in their student privacy settings will be available to other Lynn users in Workday's public directory.

From the Search field, you can find people using a couple of different methods:

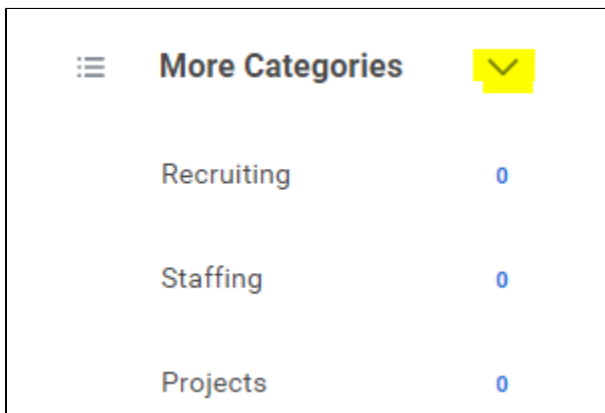
- Search by first name only. Workday will sort these results by relevance, showing all employees with a matching first name first.
- Include additional criteria, such as location, along with a first name to narrow down search results.

After searching for , their photo, business title, and supervisory organization display. This identifying information makes it easy to confirm you have found the correct person.



Keep in mind that you can only search for people using their current criteria.

Click More Categories to find items in other categories different than people, reports or tasks.



Click Configure search to add "Saved" categories



## Configure Search

### Configure Your Search



Drag and drop to reorder both lists.

#### Saved Categories

What are the categories you would like to search first? (Minimum of 1)

- ⋮ People
- ⋮ Tasks and Reports

#### More Categories

What are the categories you do not want to show?

- ⋮ Recruiting
- ⋮ Staffing
- ⋮ Projects
- ⋮ Assets
- ⋮ Banking and Settlement
- ⋮ Expenses
- ⋮ Financial Accounting

Click **View Search Tips** for better ways to search




## View Search Tips

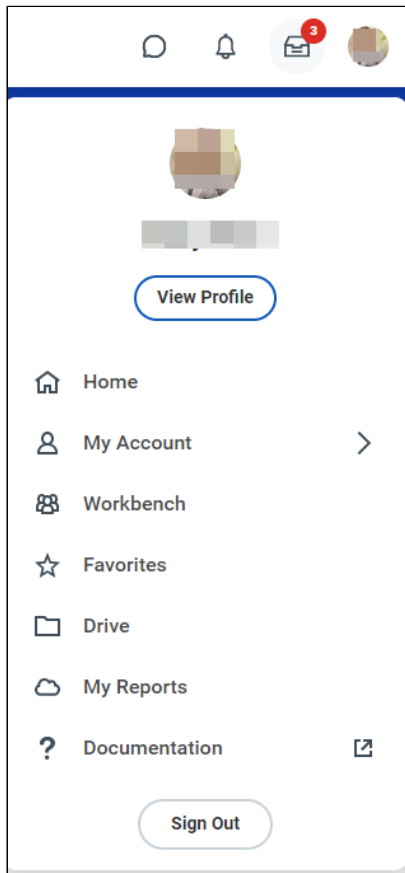
## Profile menu

The Profile menu contains links to the Home, My Account, and Favorites, to name a few.

You can also access Workday Community Documentation by clicking the Documentation link (Lynn employees only, special access required).

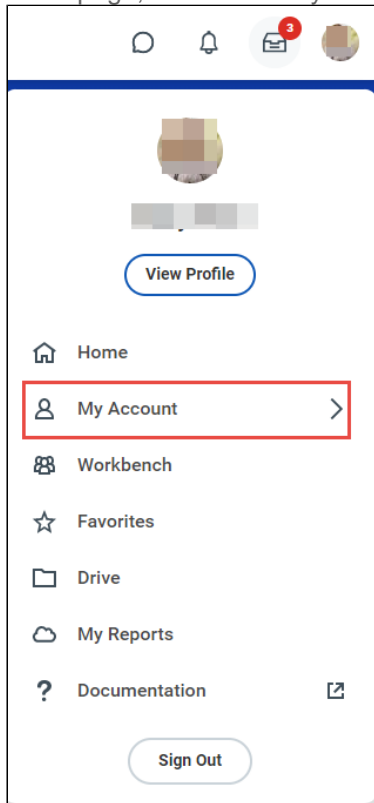
Users can view their profile by pressing their picture /cloud icon (top right corner) and press  to have a full access.

View Profile



Change Your Account Settings

You can easily change your account settings in Workday. Click your Profile icon in the top-right corner of your Home page, then select My Account.



From here, you can access your organization ID, change your password (only if you are a pre-hire or non active employee), and manage your account preferences. You can also edit your password challenge questions (for non myLynn accounts), survey your trusted devices, and view sign-in history.

If you are a delegate (employees only), click Switch Account to switch between accounts.

## Related Actions

Related Actions display next to an object and can be used to access relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (e.g., viewing or changing your benefits). In Workday, there are multiple ways to navigate to the same task, report, or data. For example, most actions available through Related Actions are also available through applications or the search bar. The following images show three common types of Related Actions:



In your profile header, you can access your Related Actions from the Actions button under your name.

**Lance Lynn (3000044)**  
Student | Lynn University  
[Actions](#)

Similarly, you can find Related Actions in the task and report headers.

## Error and Alert Messages

Error and alert messages display in red and orange. They typically identify specific fields where information is missing, entered incorrectly, or in conflict with a rule established by your organization. Click the message to view the error details.

Errors display in red. You cannot complete a task until you correct all errors.

 **2 Error(s)** [View All](#)

**Error(s)**

- 1. **Benefit Event Type**  
The field Benefit Event Type is required and must have a value.
- 2. **Benefit Event Date**  
The field Benefit Event Date is required and must have a value.

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

 **1 Alert(s)** [View All](#)

**Alert(s)**

- 1. **Page Alert**  
The landing page Home displays only the following number of worklets 20, starting with the required worklets.

## Workday Assistant

The Workday Assistant is designed to help you execute tasks, get help and discover information. Open the Workday Assistant by clicking one of the speech bubble icons on your home screen. The Workday Assistant is built to be intuitive while delivering self-service experiences and relevant information to you efficiently. Users can find a detailed list of its capabilities in [the document located here](#). Currently Workday Assistant has limited student capabilities.

