Getting Started with Workday

The role needed to perform these actions is:

- Employee As Self

> The design and appearance of Workday may be different than some of the visual components described within the job aid due to system updates.

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Core Navigation

Navigation in Workday centers around four key areas:

1. **Global Navigation Menu** — The global navigation menu is available in the top left of every Workday page, allowing users to easily navigate the various Workday apps.

2. **Workday Search Bar** — Search provides dynamic and personalized results based on a user's role and custom settings.

3. **Workday Assistant, Notifications, My Tasks, and Profile icons** — Workday Assistant is a digital assistant. The Notifications and My Tasks icons display badges for new items and a direct link to the respective area. The Profile icon provides a link to your employee profile and other actions.

4. **Homepage Cards** — The various components of the homepage are known as "cards" and contain curated information relevant to the individual employee.
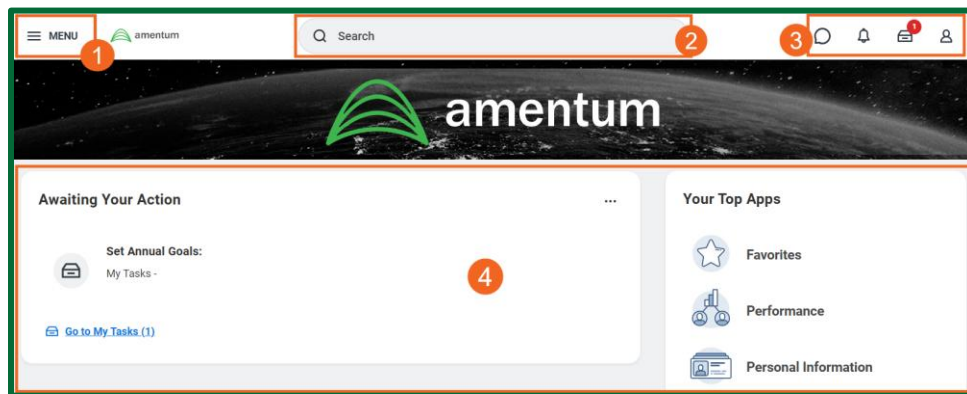
Global Navigation Menu

The **Global Navigation Menu** is available in the top left corner of every screen in Workday.
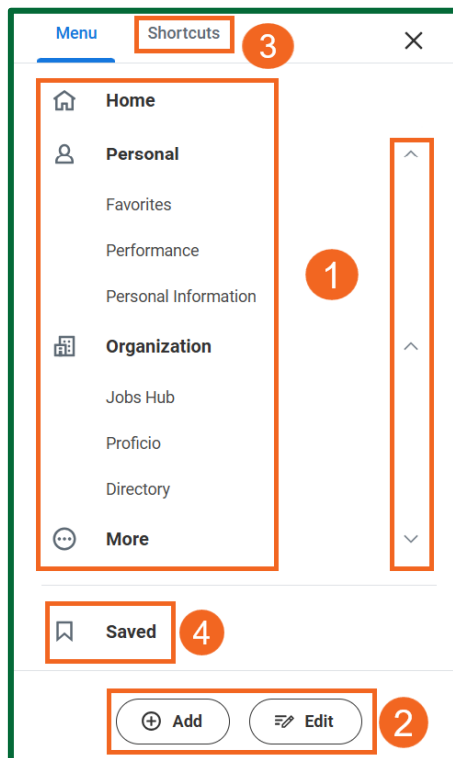
1. **Menu Categories**

Menu Categories automatically sort and categorize menu items into groups. Click the arrows to expand or close the different categories.

2. **Customize Your Menu Items**

The **Add** and **Edit** buttons allow users to add, remove, and reorder menu items within the same category. NOTE: Users cannot move the menu items from one category to another. Some apps are required and cannot be removed.

3. **Add Shortcuts**

Shortcuts allow users to save reports, tasks, and external links. Users can only add existing Workday shortcuts; custom shortcuts cannot be added. Shortcuts will also show under the **Saved** feature.
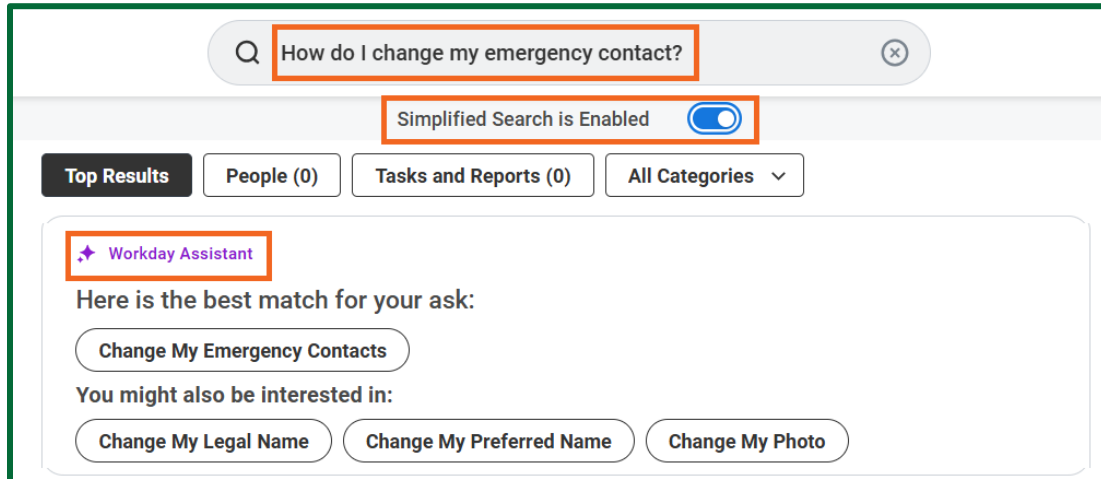
4. **Saved**

Shortcuts and Favorites can be saved under the Saved menu option. The Saved feature reduces the time needed to find saved items and streamlines content organization.

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Workday Search Bar

The **Workday Search Bar** provides fast and personalized results based on a user's role.

- Type in a topic, person, question, etc. in the **Search Bar** and click **Enter** on your keyboard.
- It is recommended to enable **Simplified Search** using the toggle switch under the Search Bar. **Simplified Search** moves the **Search Categories** from the left side of the screen to the middle of the screen under the **Search Bar**.
- If applicable, Workday Assistant will show top results.

If you do **not** enable **Simplified Search**, you may have to edit the wording in the **Search Bar** to see results because **Workday Assistant** only works with **Simplified Search**. After returning results for your **Saved Categories**, the search continues to process in the background while you review initial results.

To see additional search results beyond the initial results, click **More Categories**. Results in the More Categories may take additional time. Tips for improving your search methods in Workday can be viewed by clicking **View Search Tips** at the bottom of the left navigation menu.

Customize Search Categories
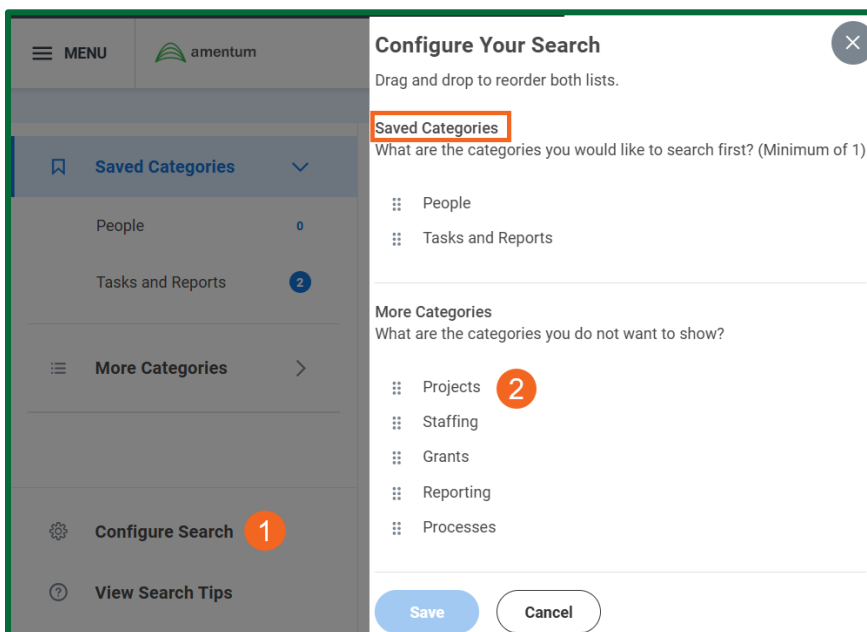
1. After performing an initial search, click **Configure Search** at the bottom of the left sidebar.

2. Drag and drop the search categories to reorder both lists. Categories under **Saved Categories** will provide results first. Results from the **More Categories** will continue to provide after the initial results are delivered.

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Workday Assistant, Notifications, My Tasks, and Profile

Workday Assistant

Workday Assistant is a digital assistant that allows employees to complete common tasks, answer questions, and navigate Workday from any page.

Notification Bell

Notifications in Workday let you know if something has been approved / requested / etc. Your notifications are relevant to People and Culture processes specific to you.

My Tasks

My Tasks is your personal activity stream. It includes Approvals and To Dos that require your action as part of business processes, as well as an archive of recently completed tasks.

Profile

The **Profile** menu is displayed as either a cloud icon or your picture (if you have uploaded a picture). View your profile to access your personal and work related information.

Homepage Cards

Workday Home consists of "cards" curated based on an employee's role.

Awaiting Your Action

This card displays your three most recent Workday tasks. To navigate directly to a task, you can select it from within the card. Keep in mind, this card only shows the three most recent items and cannot be customized or filtered.

To see your full list of Workday tasks, click **Go to My Tasks**. **My Tasks** can also be accessed via the icon in the top right corner of any Workday screen.

Timely Suggestions

This card displays timely suggestions and reminders to employees.

Recommended for You

This card are displays recommendations for you to consider, such as viewing your organization chart or a quick connection to your Worker Profile.

Announcements

This card displays upcoming news and events.

Your Top Apps

This card displays up to four applications for quick access. You can easily view, add, and edit them by clicking on **View All Apps**.