The Basics of Workday

Feature Release 2022R2 (September 2022) integrates machine learning throughout Workday. Several areas will adapt and change based on a user's navigation throughout the system – highlighted in blue throughout this document.
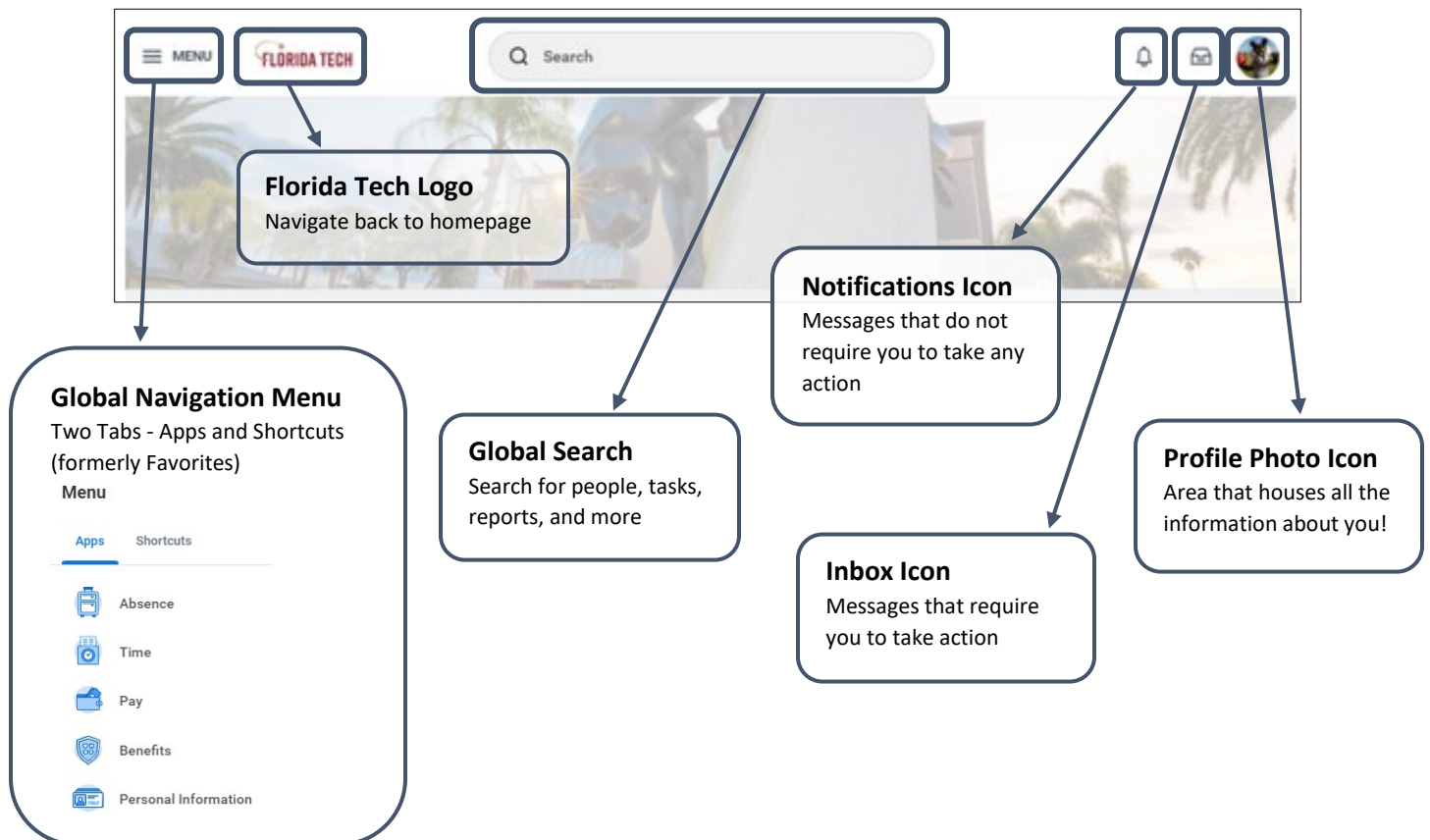
Greeting

There are 9 different rotating greetings that change throughout the day, depending on the time:

Morning (5AM-12PM)	Afternoon (12PM-5PM)	Evening (5PM-5AM)
Good Morning, [Name]	Good Afternoon, [Name]	Good Evening, [Name]
Let's Get Started	Hello There	Hi There
Welcome	Here's What's Happening	Let's Focus on You

Core Navigation

This top navigation bar can be accessed from anywhere in Workday.

Florida Tech Logo
Navigate back to homepage

Global Navigation Menu
Two Tabs - Apps and Shortcuts (formerly Favorites)

Global Search
Search for people, tasks, reports, and more

Notifications Icon
Messages that do not require you to take any action

Inbox Icon
Messages that require you to take action

Profile Photo Icon
Area that houses all the information about you!

Note: Every user belongs to different security groups, meaning that everyone's homepage will look different and have different functionality.

Account Preferences

Users can customize their search, notification, and public profile preferences in Workday.

Change Search and Notification Preferences

1. Click your profile photo or the cloud icon ☁ in the top-right corner, then select **My Account**, then select **Change Preferences**
2. Navigate to Search Preferences section
   a. **New Workday Federated Search** will display the best search results and can be configured for a more personalized experience
   b. **Classic Workday Search** will display the former familiar search experience
3. Navigate to Channel section
   a. **Email** notifications can be configured as Daily or Mute. The Daily option will send Daily Digest emails to your @fit.edu address.
   b. **Mobile Push Notifications** can be configured as Immediately or Mute. The Immediately option will send you an instant notification to your mobile device if you have downloaded the Workday Mobile App.
4. Click **OK** when finished

Change Public Profile Preferences

1. Click your profile photo or the cloud icon ☁ in the top-right corner, then select **My Account**, then select **Change Public Profile Preferences**
2. Change your public Personal Information or Talent Related Information as desired
3. Click **OK** when finished

Global Navigation Menu – Applications and Shortcuts

This area houses all the applications that were formerly displayed on the homepage. There are two tabs:
- Apps – Displays up to 20 apps, some that are standard and some that can be customized
- Shortcuts – Easily access your favorite reports, tasks, or external links that you would like to save for future use

Machine learning remembers which tab was last accessed and directs users to that tab first.

To add a new app:

1. Click the **Add Apps** button at the bottom of the Menu area
2. Type the name or part of the name of the app to be added, i.e. Requisitions
3. Click the plus ⊕ icon

To remove or change the order of apps:

1. Click the **Edit** button at the bottom of the Menu area
   a. The list towards the top displays standard apps – cannot be removed but can be reordered
   b. The list towards the bottom displays optional apps – can be reordered or removed
2. Reorder the apps as desired by hovering over the app and dragging, or
3. Remove apps as desired by clicking the minus ⊖ icon

When finished, click **Save Changes**.

Global Search

Workday makes it easy to search for people, tasks, reports, and business data.

To find contact information for an employee, simply type a name in the Search field, then either press Enter or click on the predictive text. You can then view the worker's profile to find their contact information.

Alternatively, you can shorten your search terms to broaden your results. Workday will allow a minimum of 3 letters to perform a search.

It's important to know that spelling matters in Workday. If you misspell your search term, you will likely not see the results you need.
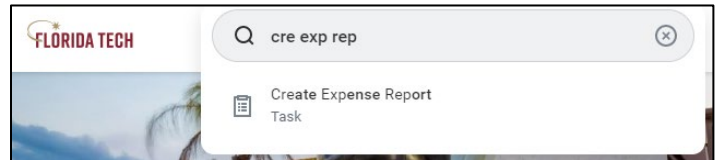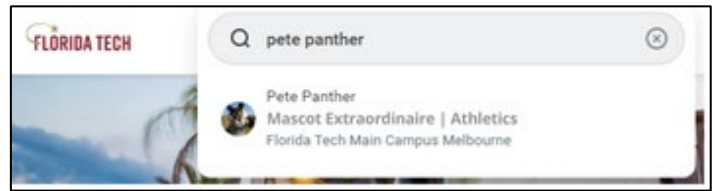
Configure Search Categories

With the New Workday Federated Search, you can customize what categories you want to show or hide. Default categories are People plus Tasks and Reports.

1. After performing a search, click on **Configure Search** at the bottom of the left sidebar menu
2. Drag a desired category name from More Categories to **Saved Categories**
3. You can also add or reorder categories as needed
4. Click **Save** when finished
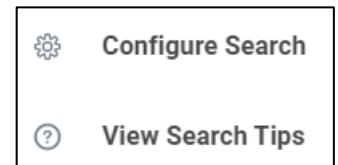
Search Assistance

You can click View Search Tips to learn more about searching with keywords or prefixes.

Workday will also assist in your search with a standard message at the bottom of the results page.
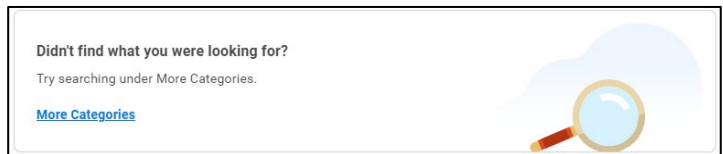
Inbox and Notifications

The inbox – also named **Awaiting Your Action** – includes messages that require you to take action on any to-do's, approvals, or tasks as part of a particular business process.

- The Actions tab is where you can view your to-do's, approvals, and business process tasks.
- The Archive tab is where you can view previous Action tab items.

Note: Once you complete an action within the Actions tab, that item automatically moves to the Archive tab.

Notifications are messages that Workday sends automatically as certain tasks and business processes are completed, and do not require you to take any action.

Home Cards

Home cards are your Workday concierge, ready to assist when you need them.

Awaiting Your Action – Front and center, access your inbox and take action on items needing your attention.

Timely Suggestions – Get notified of important tasks, such as approving timesheets or expensing new credit card transactions. Also, be reminded of any upcoming absences so you can set up your delegate.

Your Team – (Managers only) Get notified about important employee milestones, such as work anniversaries and birthdays.

Recommended for You – Machine learning drives this section, delivering suggested prompts for you.

Quick Tasks – Machine learning drives this section, remembering your most frequently accessed apps.

Announcements – Messages delivered from the University about important topics.

Related Actions

Many functions in Workday allow you to perform a "Related Action" and can be accessed via the ⋯ icon or the Actions button [Actions]. Related actions help users move from task to task easier and quicker.

Links

Links are found throughout Workday, allowing users to easily find more information about an object.

Clicking blue links will direct you to other pages of information.
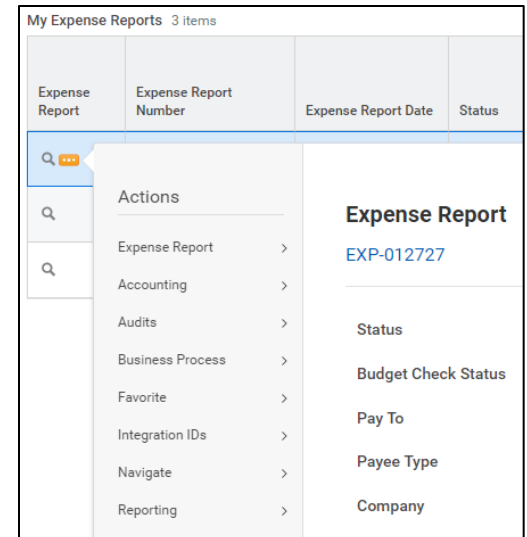
Error and Alert Messages

Error and alert messages display when you need to either be aware of something or need to take an action. They typically identify a specific field(s) where information is missing, entered incorrectly, or in conflict with a rule established by the University.

Errors will prevent you from completing a task until the error is fixed. Errors appear as red warnings.

Alerts notify you of potential problems on a page, but do not prevent the task from being completed. Alerts also display the location of missing or problematic information within the task, report, or business process. Alerts appear as orange warnings.