Getting Started in Workday

Workday Reference for Employees

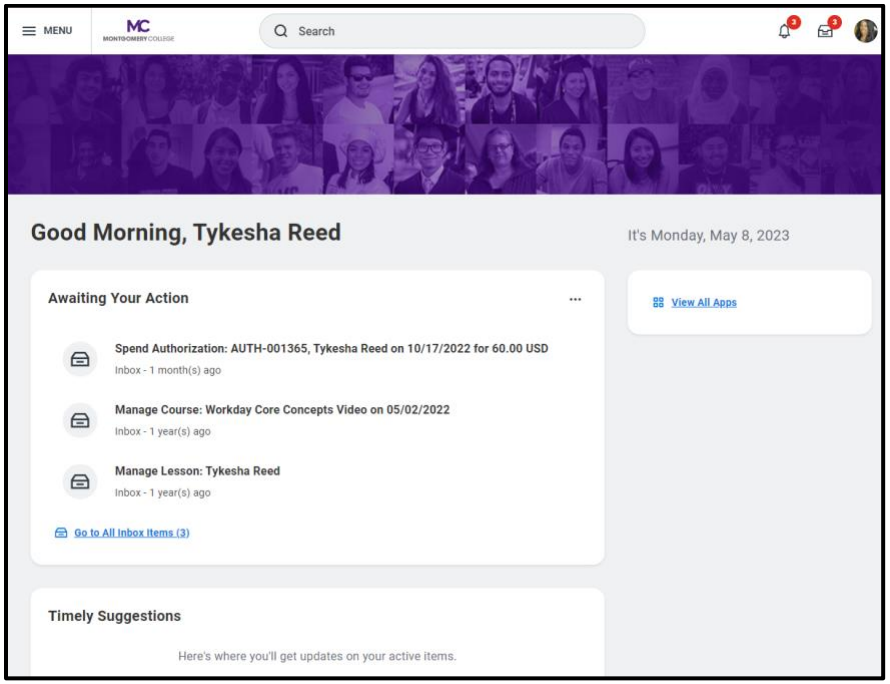
Overview

As an employee, you can initiate many of your own tasks in Workday. From viewing personal information to entering time and changing benefits, Workday enables you to maintain your most up-to-date information. Use this guide to navigate to tasks and data in the Workday system.

Getting Started

Home Page

Your Workday homepage is a hub for any actions you need to take in Workday.



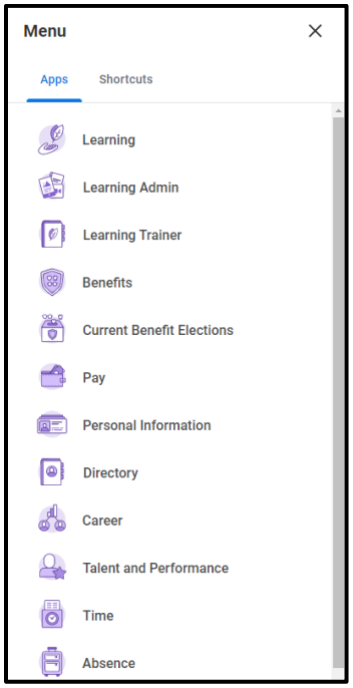
The homepage has four sections:

Awaiting Your Action – Items that require you to take action

Timely Suggestions – Brings helpful insights when you need them

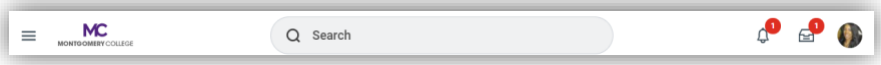
Recommended for You – Provides content based on your role, recent activity, and more

View All Apps - Click to see all of the applications. The icons contain menus with grouped tasks and reports, and the icons available to you depend on your position and responsibilities.

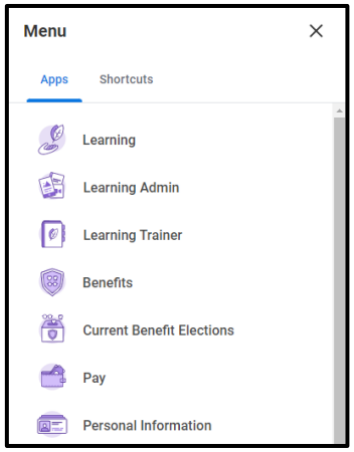


Toolbar

The Toolbar will always appear at the top of the screen and contains the following shortcuts:

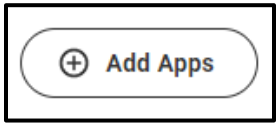


- **Global Navigation Panel:** Allows you to navigate to Apps, configure your app list and shortcuts to access favorite tasks, reports, and more.

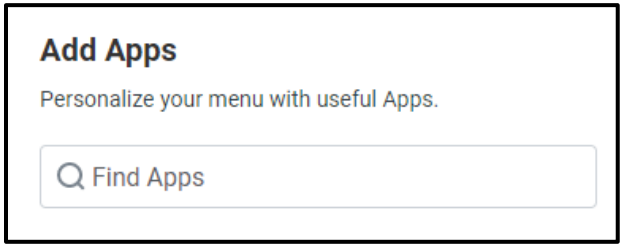


On the Global Navigation Panel, scroll down and click **Edit** to reorder the apps. Click the app, then drag and drop it in the position you want. Then click **Save Changes** to save or **Discard** to cancel the changes.

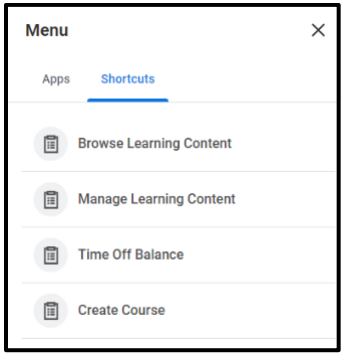
On the Global Navigation Panel, scroll down and click **Add Apps** to search for apps to add to the menu.



Type the app name in the Find Apps textbox to add an app to the Global Navigation menu.

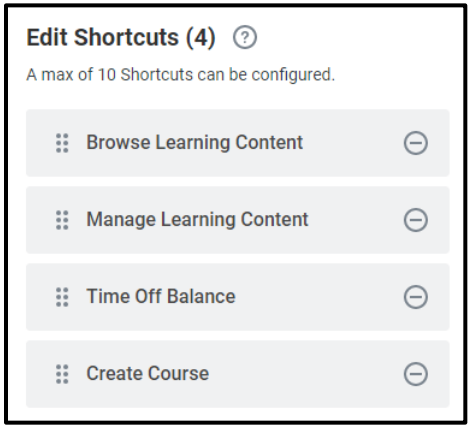


To change **Shortcuts**, in the Global Navigation Panel, click the **Shortcuts** tab.

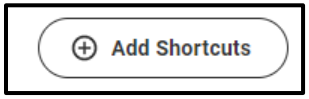


On the Shortcuts tab, scroll down and click **Edit** to delete or reorder the shortcuts. To delete the shortcut, click the shortcut, then click ⊖.

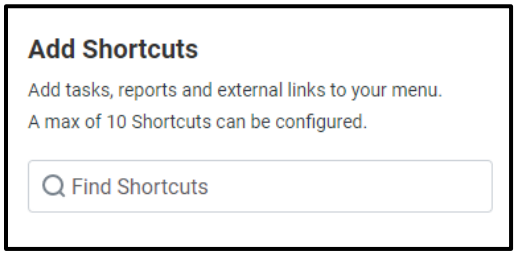
To reorder the shortcut, click the shortcut and then drag and drop it in the position you want. Then click **Save Changes** to save or **Discard** to cancel the changes.



To add a Shortcut, on the Shortcuts tab, scroll down and click **Add Shortcuts** to add it to the menu.



Type the shortcut name in the Find Shortcuts textbox to add a shortcut to the Global Navigation menu.

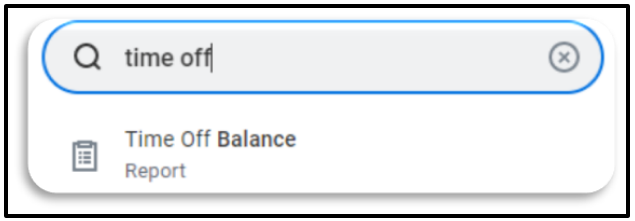


Once the shortcut appears, click the ⊕ sign to add it to the shortcut menu. To delete a shortcut, click the ⊖ sign to remove it from the menu. Then click **Save Changes** to save or **Discard** to cancel the changes.

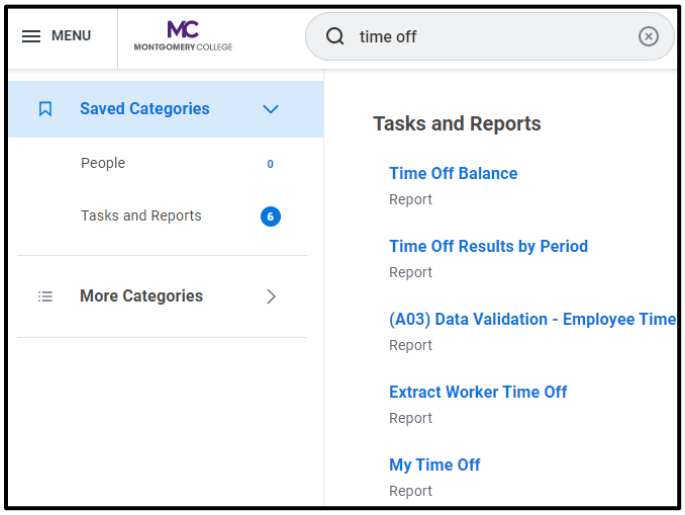
- MONTGOMERY COLLEGE **Return Home**: Use the Montgomery College logo in the top left corner of the screen to return to the home page from anywhere in the system.
- **Search**: Search will appear on the center of the screen. Depending on the size of your browser window, it may be a search bar or a search icon . See the **Search Bar** section below for more information.
- **Notifications**: Notifications are items for your information and awareness and do not require your attention. If you have an unread notification, you will see a red numbered icon indicating the number of unread notifications.
- **Inbox**: Inbox items require your action or approval and are time-sensitive. If you have an unread notification, you will see a red numbered icon indicating the number of unread inbox items. See the **Inbox** section below for more information on navigating your inbox.
- **Worker Profile**: This icon appears as a user until you have uploaded a photo, then it becomes your profile photo. Use this icon to view your Worker Profile.

Search Bar

Enter and select the task name to initiate a task from the Search bar. You can access the Search bar from anywhere throughout the system. The Search functionality will provide suggestions and Recent Searches as you are typing (you must have three letters typed of each word for suggestions to populate).



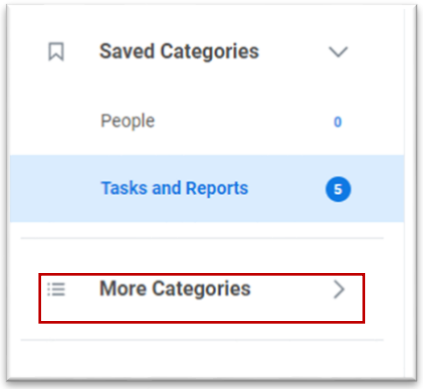
You can select an item directly from the suggestions, or you can hit **Enter** on your keyboard to view all relevant search results.



Keep in mind that searches find exact matches. If you misspell the search text, you will likely not see any results.

Search Preferences

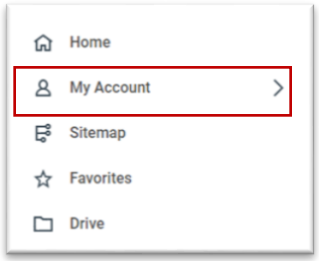
When reviewing the search results, there will be different **Categories** you can use to filter results. There is also a **More Categories** tab to expand your category results. If you do not see the category you need, you will have to change your search preferences.



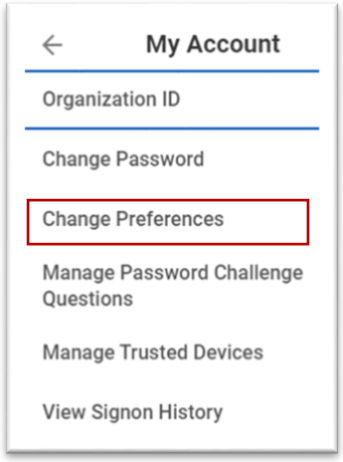
To access a more expansive and accurate search result, you will change your search preferences:

1. From the homepage, click on the **Profile** icon at the top

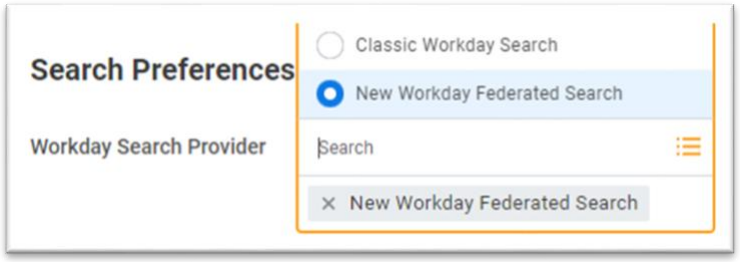
2. Select **My Account**.



3. Select **Change Preferences**.



4. Locate the **Search Preferences** section and click the **Workday Search Provider** menu button. Select **Classic Workday Search** from the drop-down list.

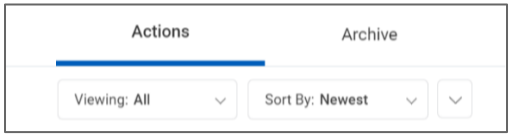


5. Click **OK** and **Done**.

Inbox

You may occasionally receive items in your Inbox that require your action or approval. Access the Inbox through the Inbox icon on your toolbar.

Inside your Workday Inbox, there are two tabs: Actions and Archive.



- **Actions**: Tasks that require your attention appear here. You must complete your tasks in a timely manner to advance them to the next person in the process flow.
- **Archive**: Tasks you have completed in the last 30 days appear in your archive.

Related Actions Icon

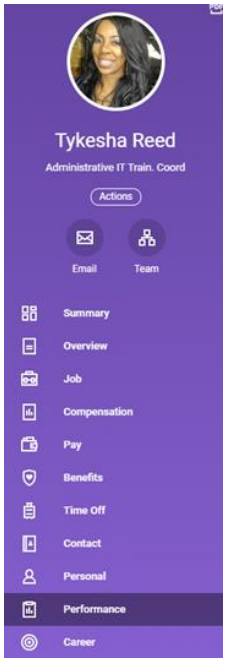
Throughout Workday, you can view additional information related to a variety of objects (workers, organizations, cost centers, and more).

- To find the **Related Actions** icon hover your mouse over an object to reveal the icon. Click the icon to view additional data or available actions.
- On your Worker Profile, this appears as an **Actions** button below the profile photo.

Worker Profile

Your worker profile contains your personal and contact information, job details, compensation and pay change history, worker history, and much more. To get started, click your Photo (or the user icon) in the upper right corner of the page and then click **View Profile**.

- The **Actions** button provides links to tasks and information.
- The **Team** buttons allow you to view your place in the organizational chart.
- The **Summary** tab displays the details of your position, including your employee ID, Hire date, and location.



- The **Job** tab displays information specific to your job and organization details, including your management chain and history.
- The **Compensation** tab displays your compensation data.
- The **Pay** tab displays your payslip and both payment history and tax elections.
- The **Benefits** tab allows you to manage your benefits.
- The **Time Off** tab shows your time off and leave requests and time off balance.
- The **Contact** tab allows you to edit your contact information.
- The **Personal** tab allows you to edit your personal information, such as names and IDs.
- The **Performance** tab shows your reviews, individual goals, archived goals, professional development goals, competencies, feedback given, and feedback received.
- The **Career** tab allows you view your job applications.

Errors/Alert Messages

Within processes, Workday generates Error and Alert messages that may prompt additional action.

- **Red Error:** The process cannot be submitted until you resolve the error (e.g., you tried to submit a task but missed a required field).

- **Orange Alerts:** The process can be submitted but may require additional attention or thought before proceeding (e.g. you submitted a timesheet with less than 40 hours in a week). Additional approvals may trigger upon submission.