

FAQs: Workday Homepage Changes

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HOME PAGE, MENU, SEARCH

- Why does my Workday homepage look different?
 - Workday as a company is continually improving the look and function of their services. While your Workday homepage may look different, it offers you more relevant information (through the 'Cards' on the new home page) as well as increased customization (e.g., through the ability to reorganize your applications and/or specify the search categories that are important to you).
- Why am I seeing my other peoples' absence in the upcoming absence card?
 - Including upcoming absences of your team is an intentional change. The 'Your Team Has Upcoming Absences' card displays your peers/colleagues upcoming absences and is intended to help you and your team be aware of planned time off and coordinate work and absences accordingly.
- Where are my Workday applications? I used to see them on the home page when I logged in.
 - The applications are now housed within the 'Menu' item in your Workday toolbar. You can access the Menu by clicking on the Menu/hamburger icon in the upper, left-hand corner of your Workday screen or by clicking the 'View All Apps' button on your home page.
- Can I remove applications?
 - If you add additional applications to your set, you can later remove those applications. You are unable to remove the list of mandatory applications that Workday provides, such as My Pay, Absence, Benefits, or My Team (a manager application). However, if you have more than 20 applications listed in your Edit Apps view, you can move any non-desired applications below the 20th application in your list; any applications below/beyond 20 will not display in the menu (but will be visible in your 'Edit' view).
- I don't see an application that I need, how do I add it?
 - Within the Menu, you can use the 'Add Apps' button to search for and add applications to your list. Please note that the menu will only display a maximum of 20 applications.
- Why is there a maximum to the applications visible in the menu?
 - This is a Workday set maximum that UVA cannot control.
- I added an application, but I don't want it anymore, how do I remove it?
 - Using the 'Edit' button, located at the bottom of the Menu, allows you to not only reorganize your applications, but also allows for you to remove any applications that you added to the list; applications that are able to be removed have the 'minus' icon to the right of the application name. Delivered applications cannot be removed from the list.
- What are the new sections on my home page?

- The homepage is now broken up into 'Cards'.
 - **Announcements:** This is not a new feature but has moved to the right side of your homepage; announcements help provide you important information related to your position/from various UVA groups (e.g., system changes like the financial modules going live). Other cards display information based on your role:
 - **Your Team:** Provides you with insight into your team, such as upcoming absences.
 - Managers will also have visibility into a team member's upcoming birthday/work anniversary.
 - **Timely Suggestions:** Provide you timely information, such as tax document (W-2) availability or any required learning you may need to complete.
 - Managers will also see opportunities to post job requisitions (based on position availability in their Supervisory Organization(s)).
 - **Recommended for You:** provides recommendations for you to consider, such as viewing your organization chart (so you can see where you 'sit' amongst your peers/colleagues) or a quick connection to your Worker Profile (which is all things... you!).
- Can I remove these 'Cards'?
 - Cards will display based on your role. You cannot remove or alter the cards on your home page. Cards will come and go as information is available/not available, so each time you come to Workday you may find different cards displayed.
- Why do my search results look different?
 - With this latest release, Workday has enhanced the search view. The new search view provides you a better view of how results match to your keyword search. By default, you will have Saved Categories (the main view) of 'People' and 'Tasks and Reports.' Other categories display in the 'More Categories' section.
 - One benefit of the new search view is it allows for you to customize/configure what search categories are most important to you. Use the 'Configure Search' button in the bottom left corner of your search page to drag and drop the categories from the More section into the Saved section; next time you run your search, you will see these categories prominently listed. If you find that certain categories are less applicable to you, you can also move categories from the 'Saved Categories' section into the 'More Categories' section; however, you must have at least one (1) category listed in the Saved Categories section.
- What are Shortcuts? I've never seen these before.
 - Shortcuts are items you set up for yourself to act as quick connections to tasks/reports that you use/view regularly. If you find that you are always running the same task/viewing the same report, consider using the 'Shortcuts' feature to identify those tasks/reports. Once you've set up Shortcuts (you can have up to 10 setup), you can quickly access them through the Menu, in the Shortcuts tab. To add a shortcut, in the Shortcuts tab of the Menu, click 'Add Shortcuts,' type the name of the task/report you

wish to add, and then click the 'plus' icon to the right of the specific task/report you're adding. If you've hit your limit on shortcuts, consider using the 'Favorites' application (and the 'Manage Favorites' task) to identify more tasks/reports that you regularly use.

- What are "Favorites"?
 - The Favorites application allows for you to specify specific Tasks/Reports that you utilize/view regularly. Set up your favorites by using the 'Manage Favorites' task. Once you've set up favorites, when you access your Favorites application, all of the set tasks/reports will display in clickable prompts. Extra win – add the Favorites application to your Menu (such as the top of your menu) for quick access, by clicking the 'Add apps' button, searching for the 'Favorite' application, and clicking the add icon, for quick access.
- What are the 'Search Tips' I see?
 - Search tips are now more prominent and are accessible through the 'View Search Tips' button (bottom left corner of the search results page). Search Tips provide you with insight into how keywords/prefixes can help expedite your search; for example, if you are always looking for student records in Workday, you can use the prefix 'student: ' to isolate search results to student records only. Similarly, if you are looking for specific business processes, you can use the prefix 'bp: ' to isolate your search result to business processes only.

MY TASKS/NEW INBOX

- Why does my Workday inbox seem different?
 - Your updated Workday inbox offers you an easier way to view the tasks awaiting your action; this view is called 'My Tasks.' You will now see a side panel of options (like you see other places in Workday) that you can expand/collapse with the familiar functionality included: All Items view, Filters view, Archive view, Bulk Approve, and Manage Delegations. You can now also search your inbox by specific names or task types.
- I see a search prompt in my inbox now, does that mean I can search my inbox?
 - Yes! With this new 'My Tasks' view, users are now able to search their inbox for specific names/task types. For users with large inboxes (and all users in general) this will be a notable improvement; simply type the task name/individuals name in the search prompt, hit enter, and Workday will limit your inbox to respect your search.
- What are the arrows to the right of the search prompt in my inbox? What do they do?
 - The up and down arrow to the right of your inbox's search prompt allow you to adjust the sorting and display density of your inbox items. You can choose to view your inbox by newest items on top (default), oldest on top, or due soonest on top. You can also select the display density of simple (view just the inbox title) or details (inbox title and brief details, such as date of the item and/or effective date).
- How do I move the side panel out of my way?
 - The side panel 'My Tasks' is expandable and collapsible. Use the small arrow just to the right of the words 'My Tasks' (if expanded) to collapse the pane, or (if collapsed) use the

directional arrow just below your 'Menu' item (the menu is the top left portion of your Workday screen) to expand the panel.

- Where is the refresh button on my inbox?
 - The actual refresh button is no longer present, but you can still refresh your inbox by clicking into a separate view and then clicking back to the 'All Items' view (e.g., click into the 'Archive' and then back to 'All Items'), or by refreshing your browser.
- How do I use filters?
 - Filters are most helpful for users with roles that come with a large inbox list (e.g., Business Administrators) and can be helpful to Managers on occasion. If you think you need to create filters for your inbox, in the filters view click 'Manage Filters,' then click 'Create Inbox Filter,' enter a Description for your filter, and identify what Business Processes/Process Types you wish to filter against (example, you might filter the Business Process type of 'Request Time Off' if you're a manager and want to limit your view to time off/absence requests).
- What is the 'Archive'?
 - Your inbox archive is where you will find your initiated/approved/denied/canceled requests from the past 90 days. There are many ways your archive can help you. For one, if you have just requested something in Workday and you decide you no longer need that request/made the request in error, you can use your Archive to find the request and (assuming you just made the request) cancel the in-progress request. Another use is to use your Archive to view a finished task's process history. Just like your regular inbox, you can also search through your Archive using the new search prompt.
- I used to be able to see more processes in my Archive, but I do not see that option anymore; can I still do that?
 - Yes! While there is no button/option for this in your inbox, you can still run the 'View More Processes' report from the Workday search bar to view processes that occurred during a span of time.
- What is bulk approve (expanded view) and/or approve multiple items (collapsed view)?
 - Bulk approve/approve multiple items is not a new feature and provides the user the opportunity to approve similar requests in their inbox in bulk; for example, a manager might use bulk approve to mass approve time entries or absence requests. Not all tasks in your inbox are able to be bulk approved.
- What does the Manage Delegations/Configure Delegations button do? What are delegations?
 - Delegations allow managers to delegate certain Workday tasks to a designee who can then manage the tasks on their behalf. There are limitations and restrictions to delegations based on the type(s) of tasks you wish to delegate; for example, all tasks can only be delegated for a certain period of time and some tasks, such as Finance tasks, require additional approvals from your department financial approvers/leadership.