

Workday Navigation

Geisinger

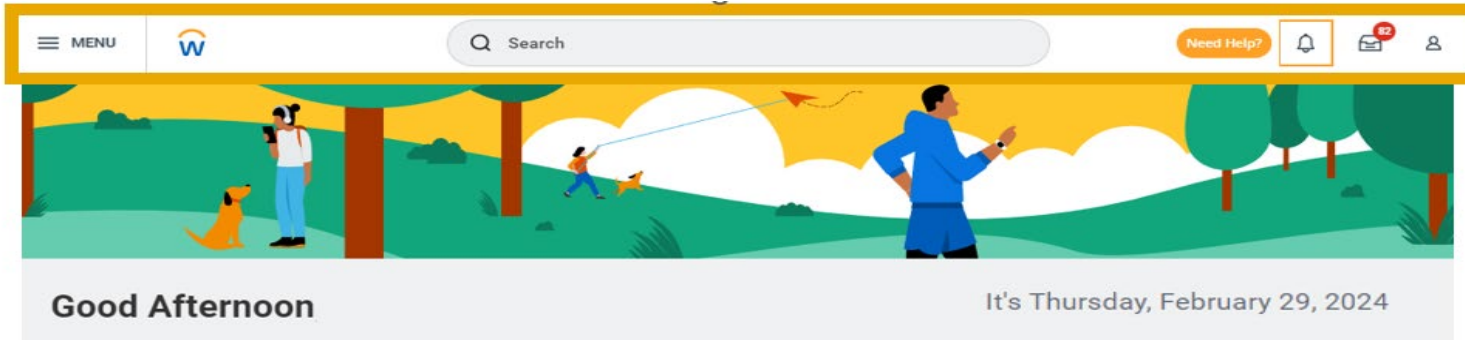
For Managers,
Employees, and
Contingent Workers

Workday Home Page

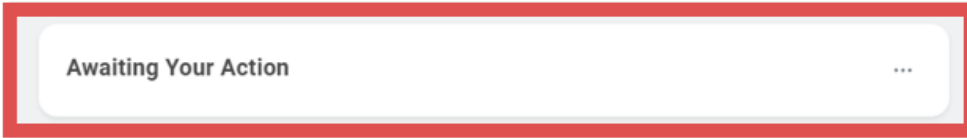
<https://geisinger.sharepoint.com/sites/HR/SitePages/Workday%20landing.aspx>

Navigating the Home Page

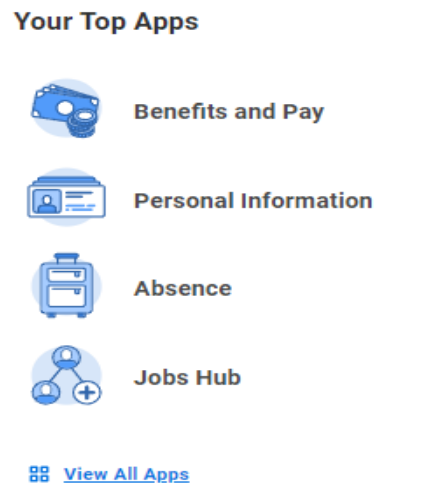
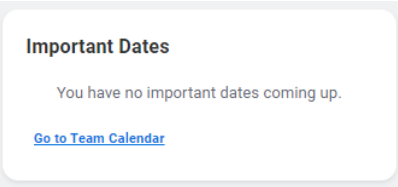
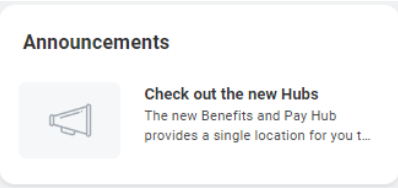
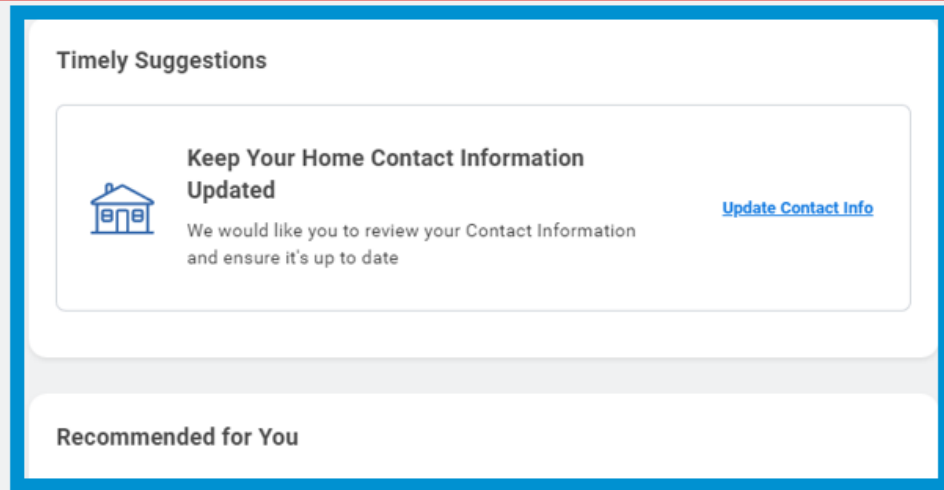
Header



Inbox Preview



Homepage Cards



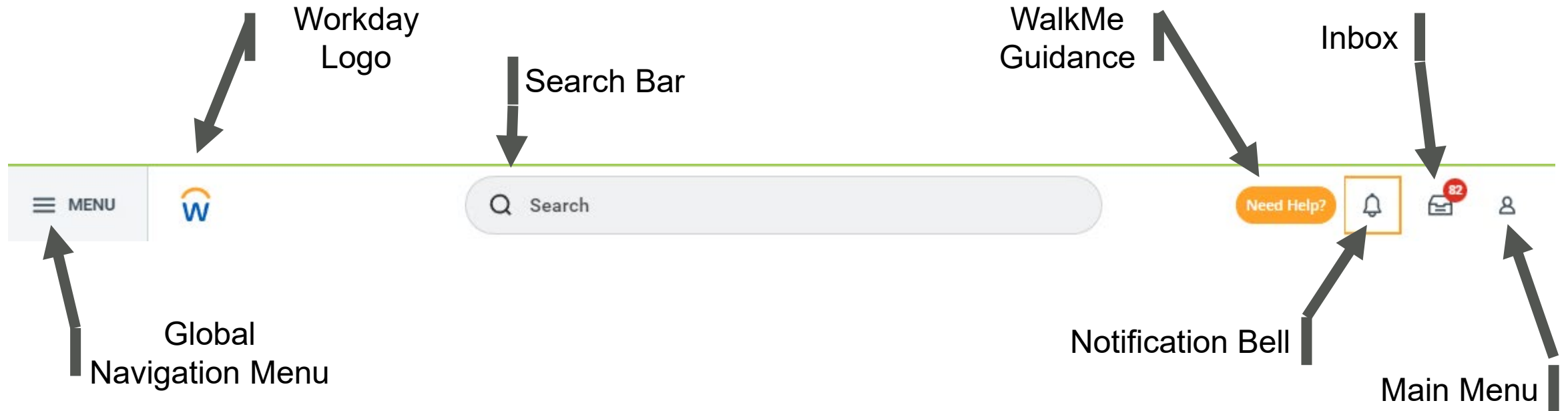
Announcements

Important Dates

Applications

Workday Home Page: Header

Header



Header Navigation

The **Header** is available on all screens within Workday and has many navigational benefits:

Global Navigation Menu- This displays your **Applications** to allow you to navigate there from a screen other than the Home Page. You can also setup **Shortcuts** if you use certain reports or tasks frequently. See slide 17 for more information.

The Workday Logo - Redirects you to the **Workday Home Page**, or the Preferred Home Page if you select one on the **Change Preferences** task.

The Search Bar- Enables you to find tasks, reports and people by **typing** as you would in an internet search engine. We will cover Searching in more detail later in this training.

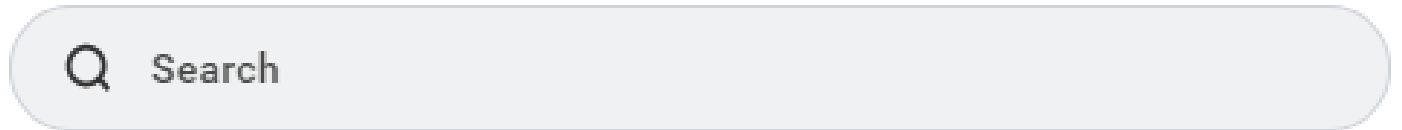
WalkMe Guidance- When you click on **Need Help?** a menu appears with difference options to help you navigate Workday and accomplish certain tasks.

Notification Bell- Information related to processes in Workday are sent here. Remember to check this regularly, or you can opt in to receive these **Custom Business Process Notifications** via email on the **Change Preferences** task.

Inbox- The Inbox is your personal activity stream. It includes Tasks (such as Approvals and To Dos) that require your action as part of business processes.

Main Menu- This icon, sometimes referred to as the “cloud”, opens the Workday menu. We’ll discuss the menu options in a few moments.

Navigating using the Search Bar



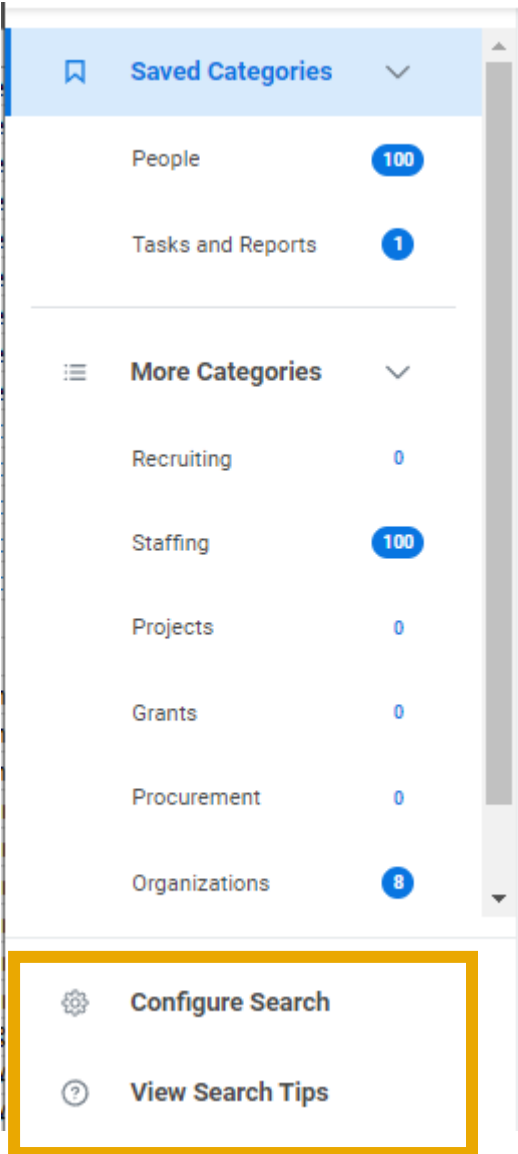
Workday makes it easy to search for people, tasks, reports and business data using the Search bar.

Once you Search, you can use categories to filter your search results for more specific results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely see no results.

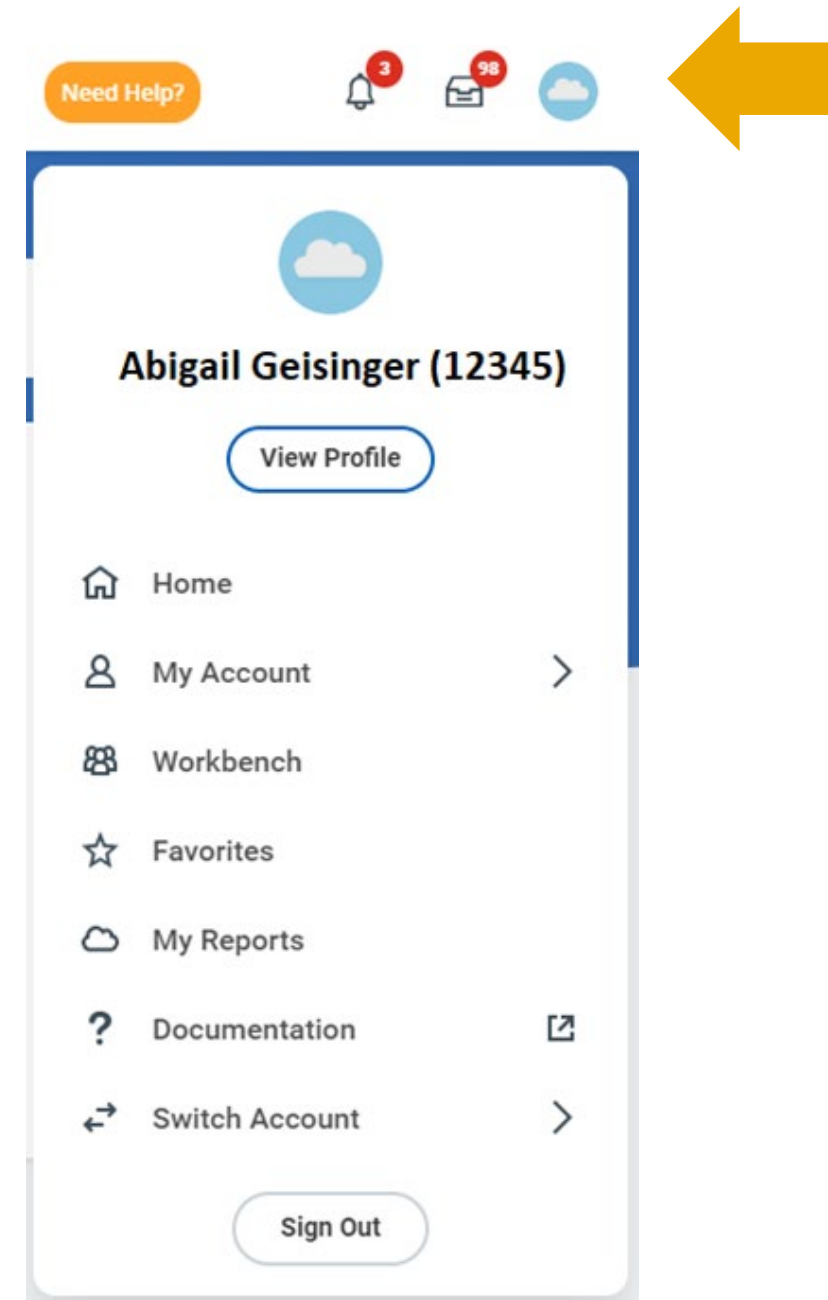
As you become more familiar with certain tasks and reports in the Workday system, you can use **partial search** to quickly find what you are looking for. For example, if you are searching for Add Emergency Contact, you can just type “add em con” and hit Enter.

Configure Settings and **Search Tips** such as search prefixes are also available on the bottom left of the search pane.



Main Menu

- **View Profile** - Opens your Worker Profile
- **Home** - Opens the Home landing page.
- **My Account** – The primary feature here is *Change Preferences*. Here you can change your preferred search category, inbox filters, and change your notification settings.
- **My Reports** - Displays a virtual drive where you can store generated reports. My Reports isn't a mapped drive on your computer.
- **Switch Account** – This feature only appears when you are a delegate. To learn more about acting as a delegate, check out our [job aid](#).



Workday Home Page: Announcements

Announcements

Announcements are updated periodically by Human Resources in order to provide relevant information about changes to HR Policies or procedures.

Be sure to log in frequently to see this information.

Announcements



Need Help in Workday?

For step-by-step instructions, visit our Workday training site ...

**Employee
Contact
Center**

For further assistance, reach out to our Employee Contact Cente...

Workday Home Page: Homepage Cards

Cards are announcement-like blurbs on the homepage that include a link to a task. They are bucketed into three Workday-delivered section: Your Team, Timely Suggestions, and Recommended for You.

They are conditioned based on who you are as the user, and what is relevant to you that day.

Your Team


The **Your Team** Section displays only for individuals who are managers of supervisory organizations.

We only have one card for this section:

Create Job Requisition from Open Position

Displays when there's an open position that doesn't include a job requisition.

Your Team



You have an open position without a job requisition (Administrative Assistant)

Create a job requisition or search Workday to "Close Position" if you no longer need it.

[Create Job Requisition](#)

Timely Suggestions

The **Timely Suggestions** section displays for managers, employees, and contingent workers. Each of the Cards in this section have their own logic around when they appear for each user.

Some card examples are:

Payslips

Enables workers to view their latest on-cycle payslips. Displays when the payslip is available to view through 4 days after the pay date.

View Available W-2s

Enables workers to view their tax documents. Displays when W-2s are available until April 15th


Change My Home Contact Information

Reminds workers to update their home contact information. Always displays on the homepage.


Create Check-In

Reminds workers to schedule a check-in with their manager. Monthly until 1 day after check-in date.

Timely Suggestions



Schedule a Check-In with Your Manager
Discuss your aspirations, career interests, and plan your near-term goals [Schedule a Check-In](#)



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](#)

Recommended for You

The **Recommended for You** section displays for managers, employees, and contingent workers. Each of the Cards in this section have their own logic around when they appear for each user.

Some card examples are:

Change 1095-C Printing Election

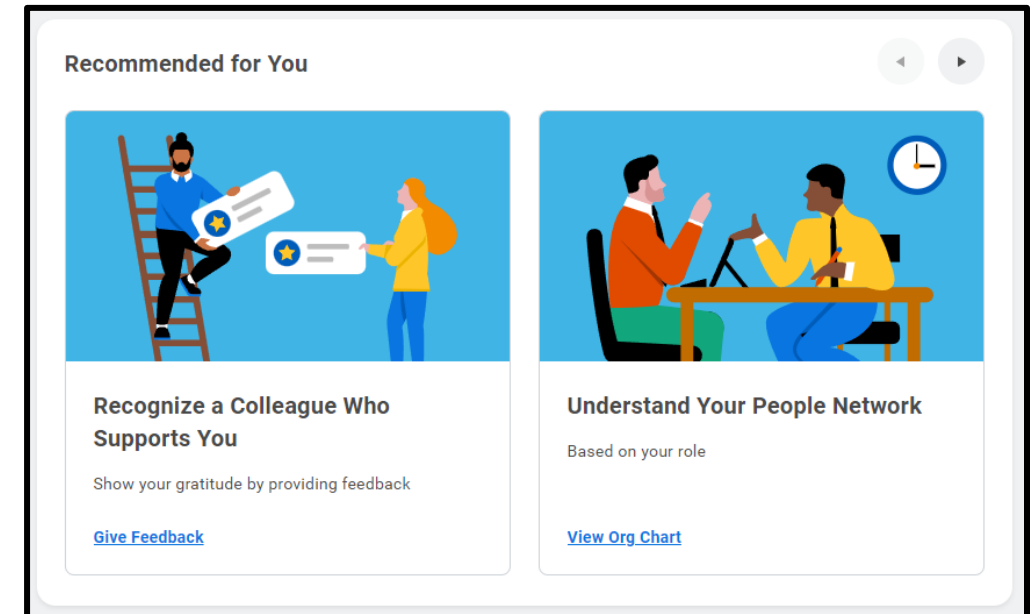
Enables workers to change your printing preferences to electronic.
Displays November through January.

Give Feedback

Enables workers to give feedback to your peers twice a year. Displays every 6 months from the worker's hire date for 2 weeks leading up to that date.

New Suggested Skills Available

Enables workers to update their skills when they have new skill suggestions. Displays when a worker's profile has changes that improved skill suggestions within the last 2 weeks, but the worker hasn't updated their skills.

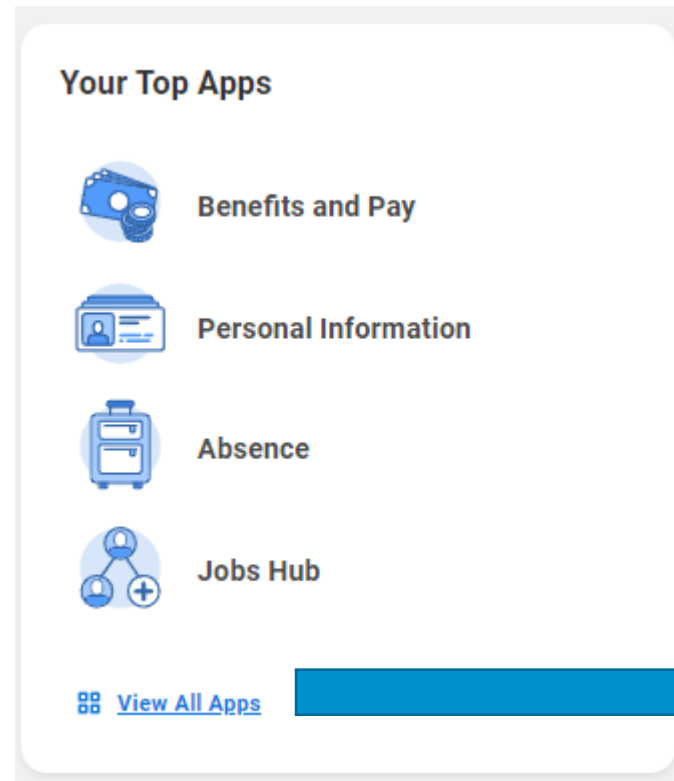


Workday Home Page: Applications

What is an Application?

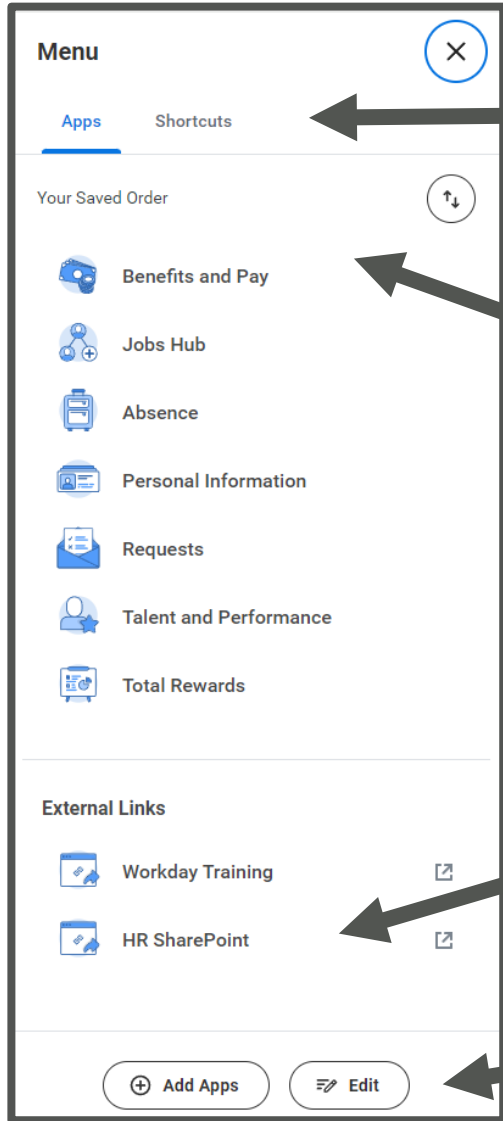
An Application is a compact report displayed as an icon that provides easy access to tasks and information you use regularly.

Based on your role, you might have fewer or more applications than shown here.



The **View All Apps** button opens the **Global Navigation Menu**.

Global Navigation Menu

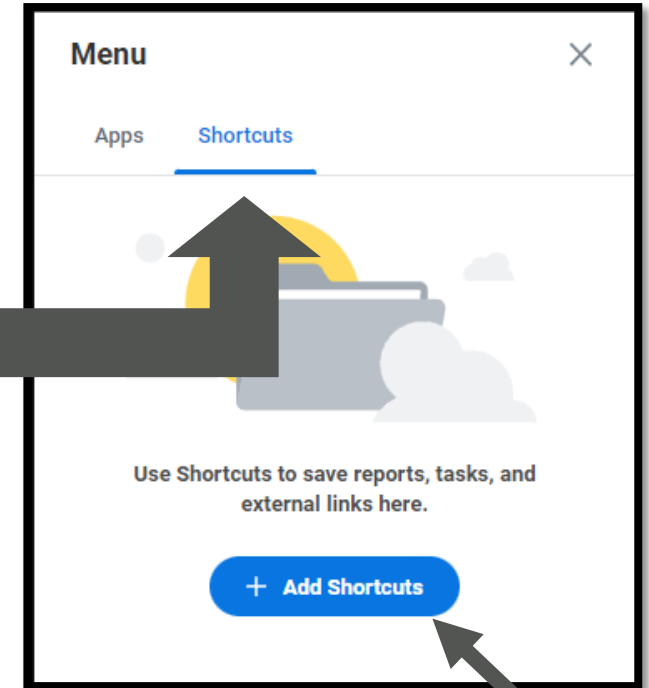


Applications and Shortcut tabs

Top Applications

Helpful Links to resources outside of Workday

You can add applications or re-order your applications using Edit



You can add shortcuts to frequent reports or tasks you use

Applications for Employees



Personal Information

Shows you common actions and views related to your personal information, including changing your contact and personal information (such as addresses, email, and phone numbers), emergency contacts, photo, legal name, preferred name and government IDs.



Benefits and Pay

Shows options related to benefits and pay.
For benefits: includes changing benefits, beneficiaries and dependents. You can also view your benefit elections and current benefits cost.
For pay/compensation: access withholding elections and payment elections, view pay slips, total compensation, bonus and one-time payment history, tax documents and allowance plans.



Absence

Shows common actions and views related to requesting a return from a leave of absence and viewing Time Off Balances.



Talent & Performance

Includes ability to track your goals as well as view and provide feedback.



Career

Includes ability to refer candidates to open positions, view & update your candidate profile, and review status of your internal applications.



Requests

Includes ability to donate to the Foundation or United Way, donations for PTO, and Reasonable Accommodation Requests.

Applications for Contingent Workers



Personal Information

Shows you common actions and views related to your personal information, including changing your contact and personal information (such as addresses, email, and phone numbers), emergency contacts, photo, legal name, preferred name and government IDs.

Applications for Managers



Metrics for Managers

Includes reports related to turnover and vacancies. More information available on our [job aid](#).



My Team Management

Includes a list of all your direct reports as well as links to tasks such as Change Job and Termination.



Compensation

Includes viewing your direct reports' pay and salary range, requesting one-time payments and compensation changes for your team and viewing their compensation history.



Team Absence

Provides quick access to view your workers who are on leaves of absences.



Team Performance

Allows you to track your team's goals and review statuses of performance evaluations. Also provides links to tasks such as Feedback and Check-Ins.



Hiring

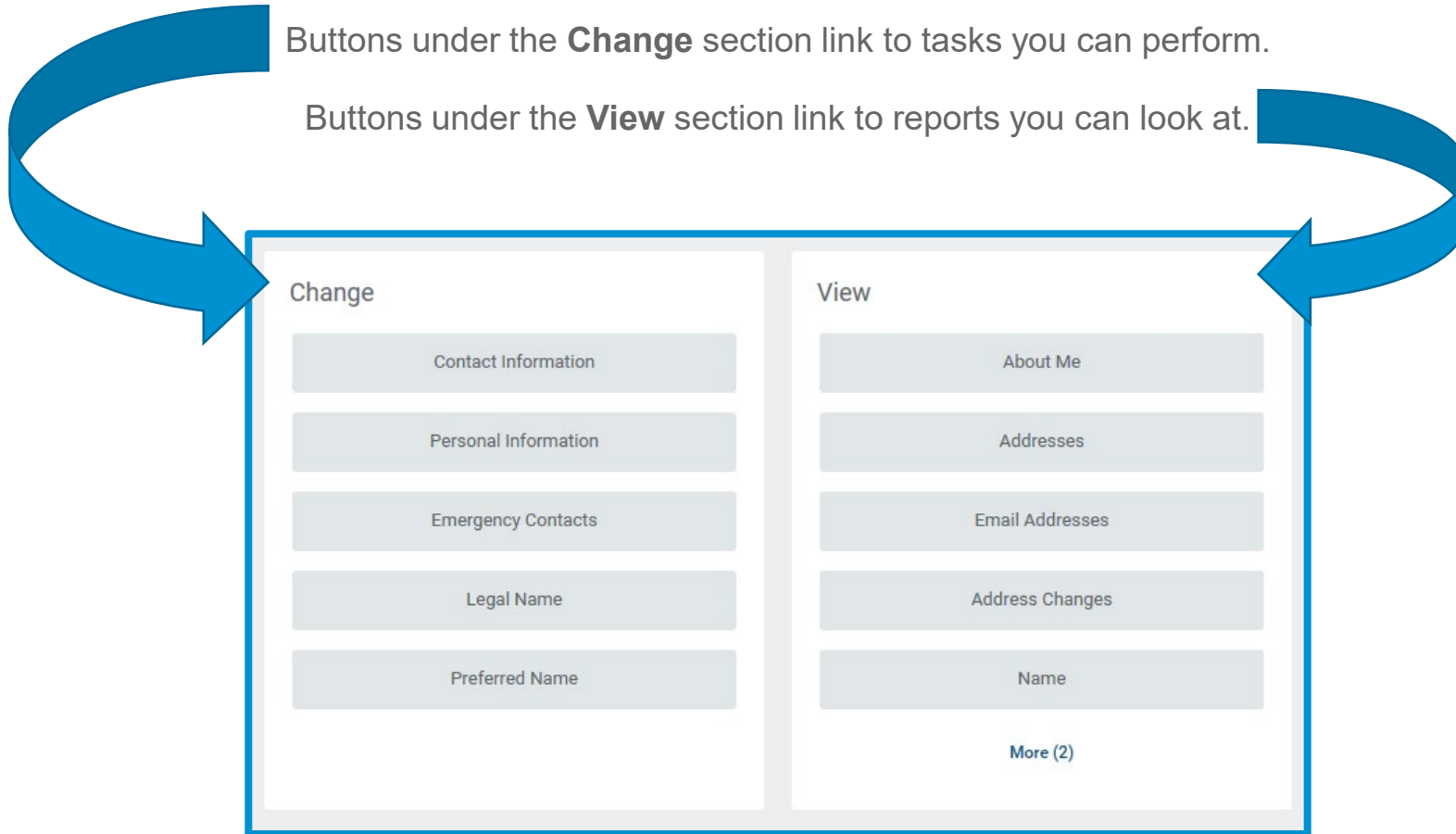
Provides common recruiting actions such as create a request for a position or job requisition and ability to view your open job requisitions.

Application Menus

A common layout for applications includes **Change** and **View** sections.

Buttons under the **Change** section link to tasks you can perform.

Buttons under the **View** section link to reports you can look at.



Common Buttons

Throughout Workday you may see many of the same types of buttons.

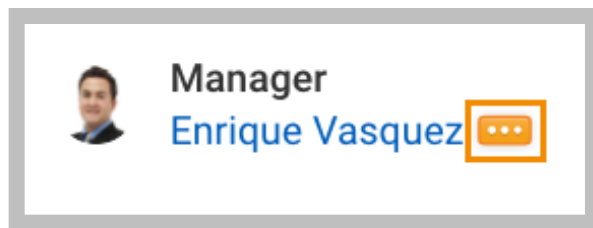
On the slides that follow are the most common ones.

Related Actions

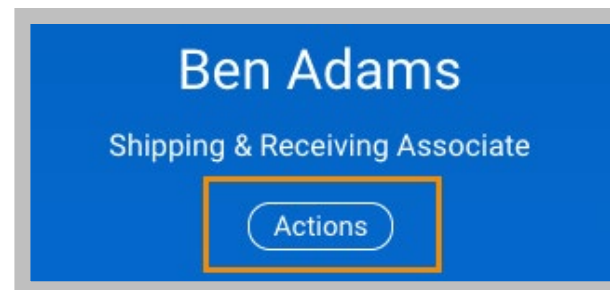
Related Actions (Brick icon) display next to an object and can be used to access relevant actions.

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).

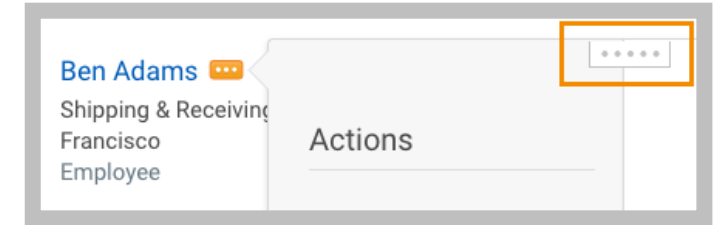
There are three common types of Related Actions:



Related Actions may appear when hovering your cursor next to a business object or link.



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



Note: You can detach the Related Actions menu from the icon by clicking and dragging the Drag icon at the top middle of the menu.



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

Buttons on Reports



Chart

Used to view a report as a chart.



Settings

Used to configure the applications and other screens.



Filter

Used to narrow down data. Clicking this icon will create a row on your report where you can filter data to display from one or more columns.



Excel

Used to view a page or report as an Excel file.



View Printable Version PDF

Used to view a page or report as a printable PDF file

Workday Home Page: Inbox Preview

For more information on the Workday Inbox,
check out our [job aid](#).

Questions?

Contact our **Employee Contact Center**
at 570-271-6640 or via email at
employeecontactcenter@geisinger.edu.

Geisinger