

Building and Editing User Experiences in Workday

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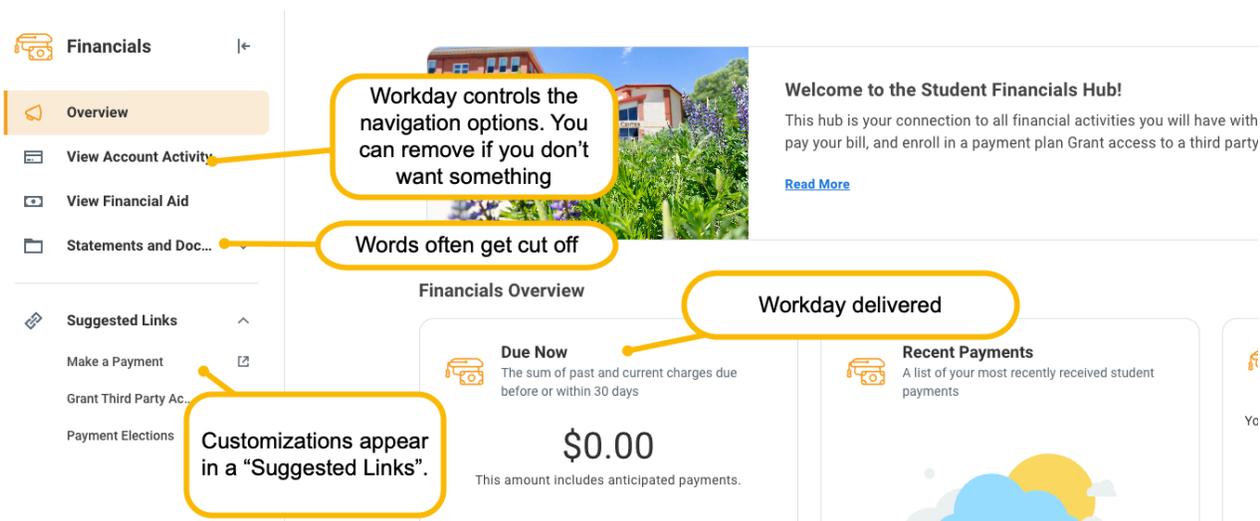
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Definitions

Hub

A Workday hub is a centralized, role-based landing page that brings together the most relevant tasks, reports, links, and guidance a user needs, so they don't have to use the Search function as a navigation tool. It's organized around what someone does, not where things live in the system. Workday's hubs are delivered, but customizable.

Hub sample:

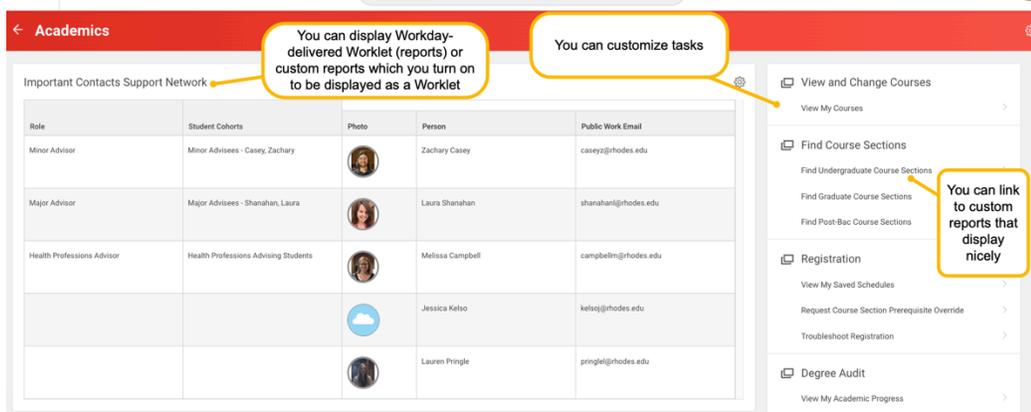


The screenshot shows the 'Student Financials Hub' interface. On the left is a navigation menu with 'Financials' at the top, followed by 'Overview' (highlighted), 'View Account Activity', 'View Financial Aid', and 'Statements and Doc...'. Below these are 'Suggested Links' including 'Make a Payment', 'Grant Third Party Ac...', and 'Payment Elections'. The main content area features a 'Welcome to the Student Financials Hub!' message, a 'Financials Overview' section with a 'Due Now' card showing '\$0.00' and a 'Recent Payments' card. Annotations in yellow callouts point to specific elements: 'Workday controls the navigation options. You can remove if you don't want something' points to the 'View Account Activity' link; 'Words often get cut off' points to the truncated 'Statements and Doc...' link; 'Workday delivered' points to the 'Recent Payments' card; and 'Customizations appear in a "Suggested Links".' points to the 'Suggested Links' section.

Dashboard

A Workday dashboard provides a consolidated view of key information and metrics, with quick links to relevant tasks, reports, and external resources to support day-to-day work. There are Workday delivered dashboards, Workday delivered dashboards can be customized, but are limited to one tab. If you need

Dashboard sample:



The screenshot shows an Academics dashboard with a red header. A table titled 'Important Contacts Support Network' is displayed. Callouts highlight that Workday-delivered Worklets (reports or custom reports) can be displayed as Worklets, and that tasks can be customized. A sidebar on the right contains navigation links for course sections, registration, and degree audit.

Role	Student Cohorts	Photo	Person	Public Work Email
Minor Advisor	Minor Advisees - Casey, Zachary		Zachary Casey	caseyz@rhodes.edu
Major Advisor	Major Advisees - Shanahan, Laura		Laura Shanahan	shanahanl@rhodes.edu
Health Professions Advisor	Health Professions Advising Students		Melissa Campbell	campbellm@rhodes.edu
			Jessica Kelio	kelioj@rhodes.edu
			Lauren Pringle	pringlel@rhodes.edu

Worklet

A worklet is a small, customizable widget or application that provides quick access to specific information or tasks. Worklets are typically displayed on a user's Workday home page and allow users to interact with Workday data or functions in a simple, efficient manner without having to navigate through multiple menus. Workday uses the word "worklet" interchangeably and sometimes it has other names.

Intro to Navigation

There are two primary ways to design a user navigation: Hubs and Dashboards. Workday owns the Hubs and determines the content. Custom items often don't show up well. Custom Dashboards can be completely customized. Workday delivered dashboards can be customized, but are limited to one tab. It is recommended to create custom dashboards so that you have more flexibility. Dashboards can be for end users like Students but also are very useful for Staff to organize their tasks and reports.

Create a New Dashboard

1. If this is the first time you are attempting to create or edit a dashboard, ensure you have the appropriate security set-up.
 - a. Access to view/modify **Set Up: Tenant Setup - Worklets**
2. Access the **Create Custom Dashboard** task. Input a name for your dashboard and click OK.
 - a. *Note: You can change the title of the dashboard later, if needed.*

Dashboard *

Cancel

OK

3. On this page, complete the following:
 - a. **Domains:** Select ALL relevant domains.
 - i. Note: The selection of domains determines who has access to the dashboard. If an individual has access to any domain on the dashboard, they will be able to access the dashboard. However, security for each item within the dashboard is still respected.
 - b. **Description:** Include relevant information on who should be using the dashboard and for what purpose.
 - c. **Dashboard Icon:** Select an appropriate icon.
 - d. **Max Worklets Allowed:** 6. (This is the default.)

Create Custom Dashboard

Dashboard Name *

Edit custom dashboard settings

Domains *

Description

Normal **B** *I* U      

Dashboard Icon *

Dashboard Tabs

Max allowed tabs is 6.

Max Worklets Allowed *

6

OK

Cancel

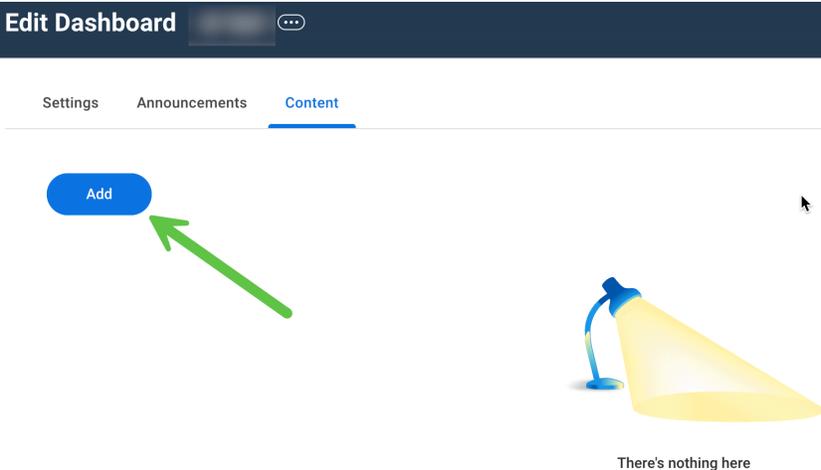
4. Click **OK**.
5. Next, navigate to the **Maintain Dashboards** report. Find the newly created dashboard and click the **Edit** button.

134 items 🔍 📄 🗑️ 🔄 🏠

Dashboard	Type	Dashboard Tabs	Run	Edit	Delete
Academics	Workday Delivered	No		Edit	
Academics for Third Party	Workday Delivered	No		Edit	
Academic Tenure Dashboard	Workday Delivered	No		Edit	
Account Certification	Workday Delivered	Yes		Edit	
Administrative Assistants Dashboard	Custom	Yes	Run	Edit	Delete
Adoption Navigator: Onboarding	Workday Delivered	No		Edit	
Adoption Planning	Workday Delivered	No	Run	Edit	

Items per page 1-30 of 134 items << < 1 2 3 4 5 > >>

6. On the Content tab, click **Add**.



7. Input a name for the tab (replacing the default name, e.g., Tab 083756).
 - a. *Note: Tab names can be changed and updated as needed.*
8. Now you can start making choices regarding how the data and reports/tasks are displayed.
 - a. **Bulletins (Use Worklets)**

Purchasing Cards

PCC Purchasing Card Policy
 Click below to review the full PCC P-Card policy.

[PCC Purchasing Card Policy](#)

b. **Embedded reports (Use Worklets)**

Current Classes ⚙️

Course Listing	Section	Instructional Format	Delivery Mode	Meeting Patterns
EDUC 240 - URBAN EDUCATION POLICY	EDUC 240-01 - URBAN EDUCATION POLICY	Lecture	In-Person	Monday/Wednes 10:00 AM - 10:50 Campus B 103 CI
PSYC 306 - PSYCHOLINGUISTICS	PSYC 306-01 - PSYCHOLINGUISTICS	Lecture	In-Person	Tuesday/Thursd 12:15 PM Rober Classroom
PSYC 323 - SOCIAL PSYCHOLOGY	PSYC 323-01 - SOCIAL PSYCHOLOGY	Lecture	In-Person	Monday/Wednes 1:00 PM - 1:50 PM 043 Classroom

c. **Direct links to tasks, reports, or external sites. (Use Menu)**

Employee Reimbursement

P-Card Expense Report Guide

Finance Reporting & Approval Delegation

9. For bulletin worklets or embedded reports, expand the **Worklets** section.
 - a. Click the “+” symbol. In the **Menu Item** dropdown, any reports that are enabled as worklets for this dashboard will display, along with any bulletin worklets that have been created for the dashboard.
 - i. If a report does not show in the dropdown, you’ll need to edit the report to enable it as a worklet and define the dashboard.
 - ii. To create a bulletin worklet, select **Create** and select **Create Bulletin Worklet**.

Worklets

Worklets 4 items ☰

	Order	*Menu Item	*Security Groups	Required?	Worklet Size
					
 	▼ ▼	Search <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	1x
 	▲ ▼	All >	<input type="text"/>	<input type="checkbox"/>	1x
		Create >			

- b. See [Creating and Managing Bulletin Worklets](#) for detailed information on creating a bulletin worklet.

10. For Menu items, expand the Menu section. Click the “+” symbol. Input a label for the section.
 - a. *Note: The location of the menu is not configurable, it always displays on the far right-hand side. You also cannot create multiple menus, all items in the menu section display in one long column.*
 - b. The section label can be used to connect institutional language to Workday tasks. When a user can’t remember the name of a task in Workday the section label can guide them to the task related to that topic.

Menu

Menu Section items ☰

	Order	*Section Label		Order	Item
					
 	▼ ▼	<input type="text"/>			

11. To add items within that section, click the “+” sign.
 - a. **Task:** This references both Workday-delivered tasks and reports.
 - i. Depending on the domains that were added to the dashboard, you may be able to directly select the task from the dropdown. If it does not appear when you search, you need to select **Create Custom Allowed Worklet Task**.
 - ii. Make sure to select the one associated with the right task for administrators and not one designated for students or instructors.
 - iii. It’s typically NOT recommended to use the **Add Custom Name** option. While it can seem helpful, the sooner users familiarize themselves with the Workday terminology, the better they will be able to navigate.

The screenshot shows a 'Menu sections' configuration table with 3 items. The first item is 'Test Section'. A search dropdown is open, showing search results for 'payroll' (6 results). The selected result is 'Payroll Accounting by Period/Pay Group'. Other results include 'Payroll Register by Period', 'Payroll Input by Batch ID', 'Payroll Changes Unprocessed for a Retro Run', 'Run Payroll Audit', and 'Add Payroll Input by Worker'.

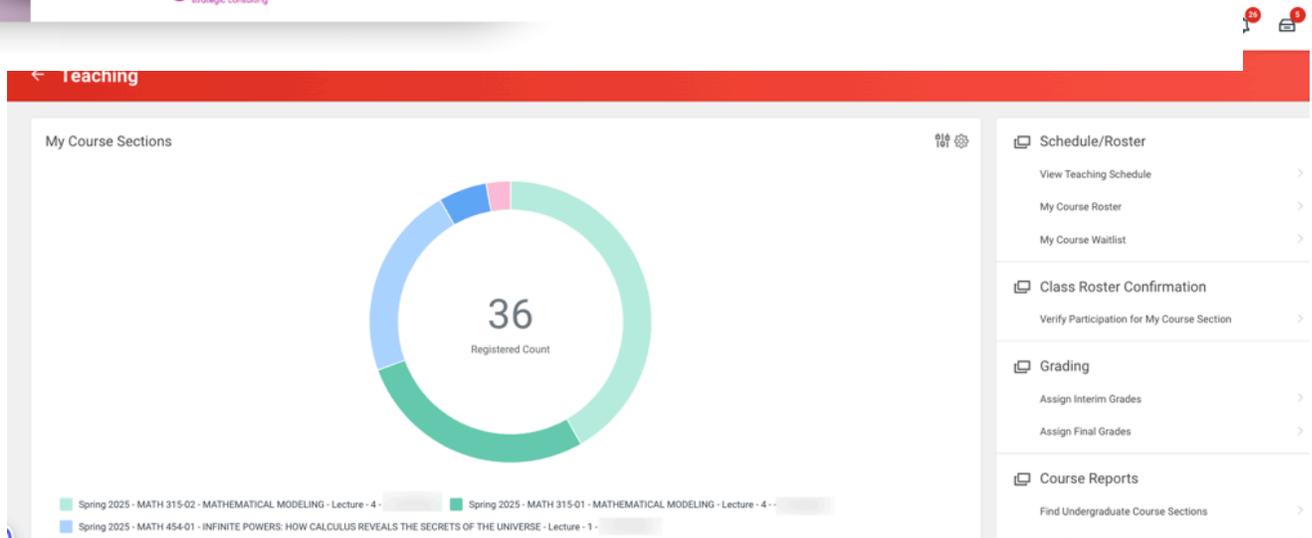
- b. **Custom Report:** To add a custom report, search in this dropdown.
- c. **External Link:** To add an external link, it must first be created as a QuickLink. It is recommended to search for a link first, before creating a new QuickLink. If a new QuickLink is needed, you can access the task directly from the dropdown.

This screenshot shows the same menu configuration interface. The search dropdown is open, and a green arrow points to the 'Create Quicklink' option at the bottom of the list. The dropdown also shows options for 'Task', 'Custom Report', and 'External Link'.

- 12. Continue adding worklets and menu items on the tab. To create additional tabs, click the **Add** button on the Content page.

The screenshot shows the 'Content' page with tabs for 'Settings', 'Announcements', and 'Content'. A blue 'Add' button is highlighted with a green arrow. Below it, a list of 4 items is shown, with 'Procurement' selected. To the right, an 'Edit' form is visible with the 'Tab Name' field set to 'Procurement'.

- 13. (Optional) Ask a report writer to design a visual report that you can add in the worklet section.



14. Once the dashboard is created, it is available to users via the Search function. To add it to the global Menu navigation, additional steps are required (see [Configure Global Navigation](#)).

Edit an Existing Dashboard

1. Access the **Maintain Dashboards** task. Find the dashboard you wish to update and click the **Edit** button.

Maintain Dashboards					
Dashboard	Type	Dashboard Tabs	Run	Edit	Delete
Academics	Workday Delivered	No		<input type="button" value="Edit"/>	
Academics for Third Party	Workday Delivered	No		<input type="button" value="Edit"/>	
Academic Tenure Dashboard	Workday Delivered	No		<input type="button" value="Edit"/>	
Account Certification	Workday Delivered	Yes		<input type="button" value="Edit"/>	
Administrative Assistants Dashboard	Custom	Yes	<input type="button" value="Run"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
Adoption Navigator: Onboarding	Workday Delivered	No		<input type="button" value="Edit"/>	
Adoption Planning	Workday Delivered	No	<input type="button" value="Run"/>	<input type="button" value="Edit"/>	

Items per page: 30 | 1-30 of 134 Items | 1 2 3 4 5 >>

2. To make changes to the dashboard name, domains, or icon, click on **Settings** tab and select **Edit** button.

Dashboard Name Administrative Assistants Dashboard

Domains [Staffing Actions](#)
[Worker Data: Workers](#)
[Worker Data: Staffing](#)

Description A centralized dashboard designed for Administrative Assistants to quickly access their most f
Full list of PCC Workday Training Guides [available here](#).

Dashboard Icon  Reports

Max Worklets Allowed Per Tab 6

[Edit](#)

- To edit content on the dashboard itself, click on Content tab. You can then navigate between pages of the dashboard and add/remove content as needed.
- To update a link that is out of date, use the **Maintain Quicklinks** task. You can either edit the link of the existing quicklink or create a new quicklink. If creating a new link, you'll need to update the item on the dashboard.
 - Note: Quicklinks can be used across Workday, so updating a quicklink will update it across the board, not just on the dashboard.*

Maintain Quicklinks

61 items

	Quicklink	*Name	*URL	Description	Condition Rule	Used by Group	View Details
		2025-2027 Budget Manual	https://drive.google.com/file/d/1r1PszV7JUcDGRnmMxTpLIIJRj1DE2OG/view				View Details
		Acceptable I-9 Documents	https://www.uscis.gov/i-9-central/form-i-9-acceptable-documents				
		Accessible Syllabus Guidelines	https://www.pcc.edu/instructional-support/accessibility/syllabus-templates/				View Details
		Accessible Syllabus Template	https://docs.google.com/document/d/1aKw_S5wHwvnrBlaT_AhoaBZtjRNbILFoEg73sOS6zk/teplate/preview				View Details

Configure Global Navigation

- Workday enables you to design the organization of menu items. To do so, access the **Configure Global Navigation Menu** task.

Dashboards/Worklets 20 items

Order	*Menu Item	*Security Groups	Required?	Workday Worklet Title	Rename Menu Item
	× Onboarding	<ul style="list-style-type: none"> × Contingent Worker As Self × Employee As Self × Pre-Contingent Worker as Self × Pre-Employee as Self 	<input checked="" type="checkbox"/>		
	× Learning Trainer	<ul style="list-style-type: none"> × Implementers × Internal Learning Instructor as Self × Learning Administrator × Learning Assessor as Self 	<input checked="" type="checkbox"/>		
	× Learning Admin	<ul style="list-style-type: none"> × HR Auditor 	<input checked="" type="checkbox"/>		

- Click on the **Categories** section. Set your category labels. This is what will display to users on the left hand navigation bar as a header with the dashboards/apps below it. Confirm across HCM/FIN/Student which categories each product area wants to use

Dashboards/Worklets **Categories** External Links

Categories 23 items

Order	Default Category	Rename Category
▼ ▼	Accounts Payable	
▲ ▼	Accounts Receivable	
▲ ▼	Cash and Banking	

Categories display in the order listed here. Categories are only displayed to users with appropriate security.

- Go to the **Dashboards/Worklets** tab. Customize which category the dashboard should go into. Even if you have used a label, the original category name will display here.
 - You can organize the **Category Override**. You can no longer set the order that the dashboards (apps) display. Dashboards only display in alphabetical order within the category.

Dashboards/Worklets Categories External Links

Dashboards/Worklets 21 items

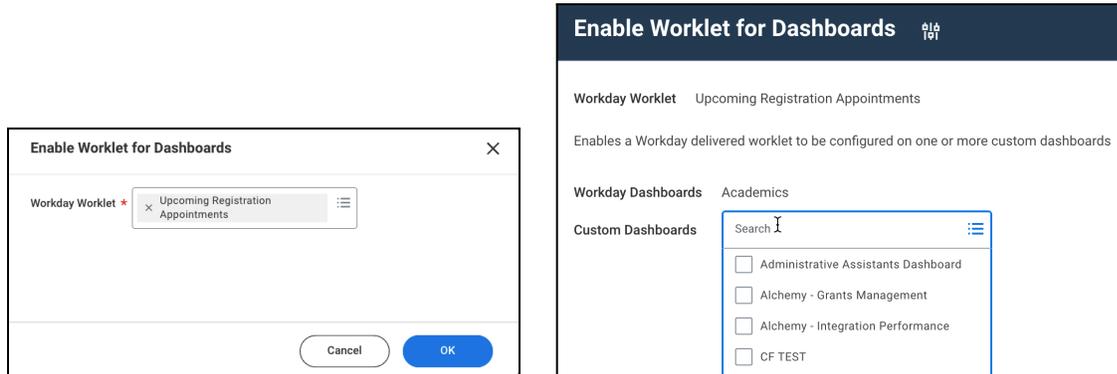
Order	*Menu Item	*Security Groups	Required?	Workday Worklet Title	Rename Menu Item	Invalid Landing Page Admin Configuration	Default Category	Category Override
▼ ▼	× Registrar	<ul style="list-style-type: none"> × Student Records Administrator × Student Records Manager 	<input checked="" type="checkbox"/>					× Student Administration
▲ ▼	× Enrollment Services	<ul style="list-style-type: none"> × Student Admissions Administrator × Student Information Services 	<input checked="" type="checkbox"/>					× Student Administration
▲ ▼	× Academics	<ul style="list-style-type: none"> × Student as Self 	<input checked="" type="checkbox"/>				Student	
▲ ▼	× Finances	<ul style="list-style-type: none"> × Student as Self 	<input checked="" type="checkbox"/>				Student	

If there is no Default Category and you don't specify a Category Override, Workday will put it in a More category at the bottom of your Navigation hub.

Adding a Workday-Delivered Worklet to Custom Dashboard

Workday creates delivered worklets. If you have a custom dashboard, you must enable a Workday-delivered worklet to appear.

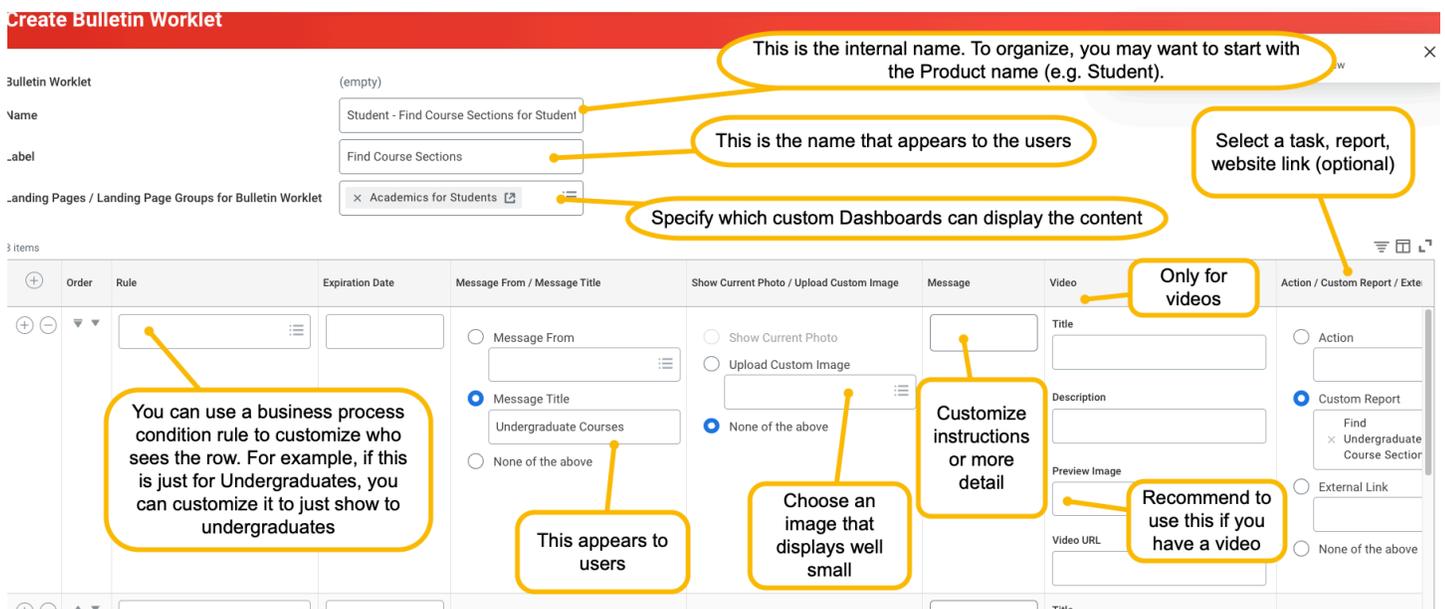
1. Access the **Enable Worklet for Dashboards** task.
2. Select the worklet and select the dashboard you created.



Creating and Managing Bulletin Worklets

A visually appealing way to display information to students is using the bulletin functionality. Bulletin worklets also allow use of condition rules so you can customize which users see the bulletin in their dashboard.

1. Access the **Create Bulletin Worklet** task.
2. Follow the below image to understand each aspect:



3. Go to **Maintain Dashboards** and select the custom dashboard that you're updating.

The screenshot shows the 'Edit' interface for a dashboard tab named 'Registration and Course Management'. It features a table of Worklets with columns for Order, Menu Item, Security Groups, Required?, Worklet Size, Workday Worklet Title, and Rename Menu Item. Three yellow callout boxes provide instructions: 'Add the bulletin worklet to the custom dashboard' points to the 'Find Course Sections' menu item; 'Select if users must see it (recommended)' points to the 'Required?' checkbox; and 'Determine the size. It's often best to play around with the size and order until you're happy with the view.' points to the 'Worklet Size' dropdown.

4. Proxy as a user that meets the rules/security to confirm view. Adjust as needed.

Adding an Announcement to a Dashboard

1. Access the **Maintain Dashboards** task.
2. Find the dashboard and click **Edit**.
3. Go to the **Announcements** tab and click the **Edit** button.

The screenshot shows the 'Edit Dashboard' interface for 'Administrative Assistants Dashboard'. The 'Announcements' tab is selected, and an 'Edit' button is highlighted with a green arrow. Below the button is a table with columns for Rule, Expiration Date, Message From / Message Title, and Show Current Photo / Upload Custom Image. The table is currently empty, showing '0 Items' and 'No items a'.

4. Click the **+** sign.

The screenshot shows the 'Configure Announcements' interface. It features a table with columns for Order, Rule, Expiration Date, Message From / Message Title, and Show Cu. A green arrow points to a '+' sign in the first column of the table, indicating where to click to add a new announcement.

5. If you want to use conditional logic to determine the audience who will see the announcement, add a rule.
6. If you want an announcement to display only for a period of time, add an expiration date. If you want to just put a permanent message, leave blank.
7. You have options for a message title, image, video, and direct link to task, report, external site. The content of the announcement is input in the **Message** section.

im Report / External Li

MM/DD/YYYY

Message From

Show Current Photo

Upload Custom Image

None of the above

Message Title

None of the above

None of the above

Title

Description

Preview Image

Video URL

Media

Drop file here

Task

Custom Report

External Link

None of the above

8. Click **OK** to save.

Maintaining Hubs

1. Set up security for hubs. Workday documentation regarding hub security is available [here](#).
2. Go to the task **Maintain Hubs**.
3. Use the Action button to configure.

Maintain Hubs

23 items

Hub	Action
Academics	Action
Benefits and Pay	
Buyer Hub	

Configure Overview
Customize Hub Navigation
Configure Suggested Links

4. On the Configure Overview, these are the worklets that display on the middle of the page.

Configure Hub by Admin

Hub Definition Academics

Hub Title

Academics Overview

Academics

Announcement

0 items

Order	Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message	Video
No Data						

Content

- Default Sections and Cards
- Customize Sections and Cards

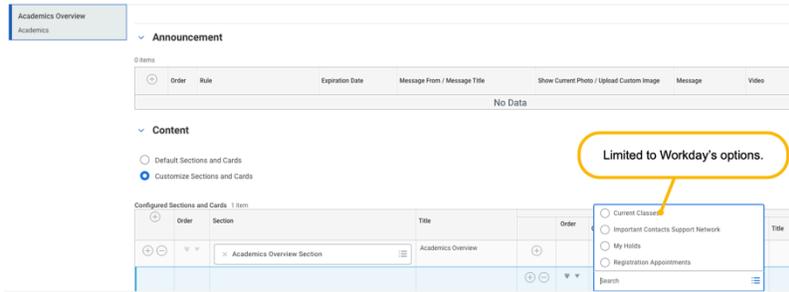
Configured Sections and Cards 1 item

Order	Section	Title	Order	Title
+	Academics Overview Section	Academics Overview	+	

Current Classes
Important Contacts Support Network
My Holds
Registration Appointments

Limited to Workday's options.

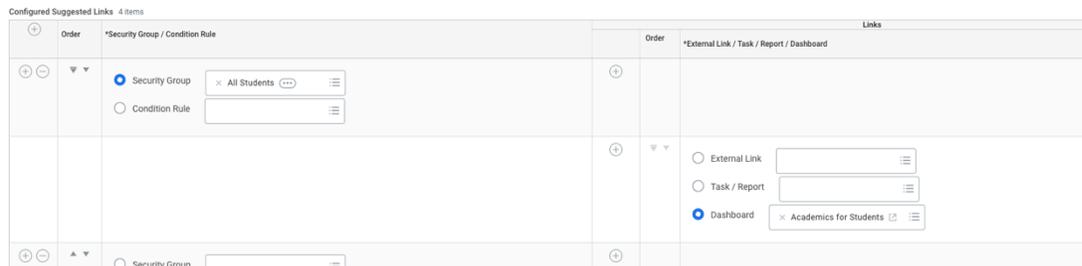
5. You can customize the Navigation items Workday provides in the Hubs.



6. In the **Configure Suggested Links**, you can add custom tasks/reports. If you add the dashboard, it allows students to return to that dashboard in the navigation.

Configure Suggested Links

Suggested Links



7. If you want the hub to appear in the left-hand navigation, you need to add it to the **Global Navigation Menu** as a **Dashboard/Worklet**.

Configure Global Navigation Menu

