DOCUMENTATION
by **legato**
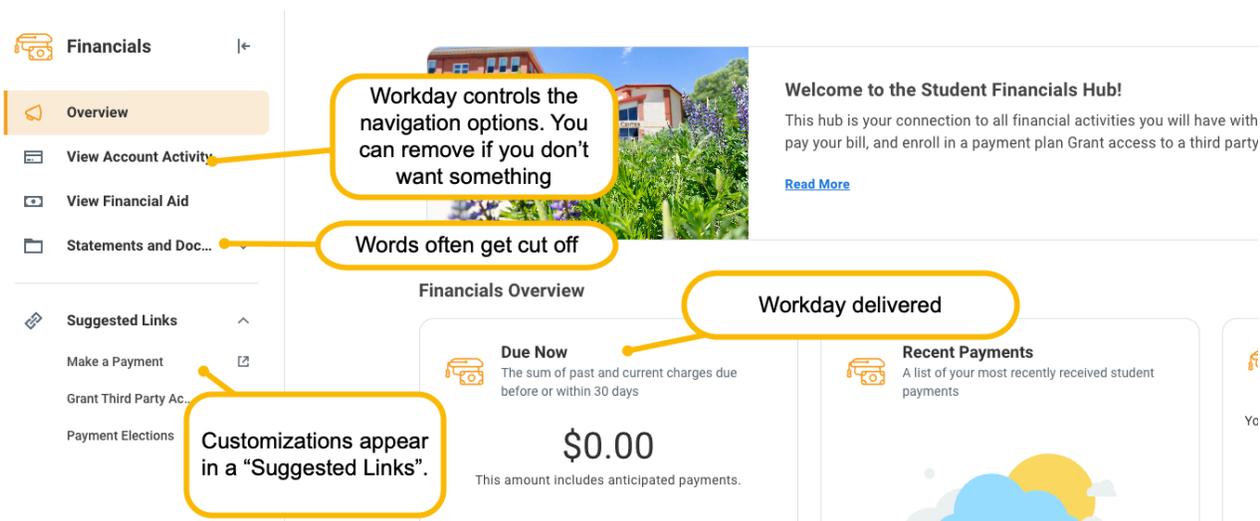*strategic consulting*

Building and Editing User Experiences in Workday

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.
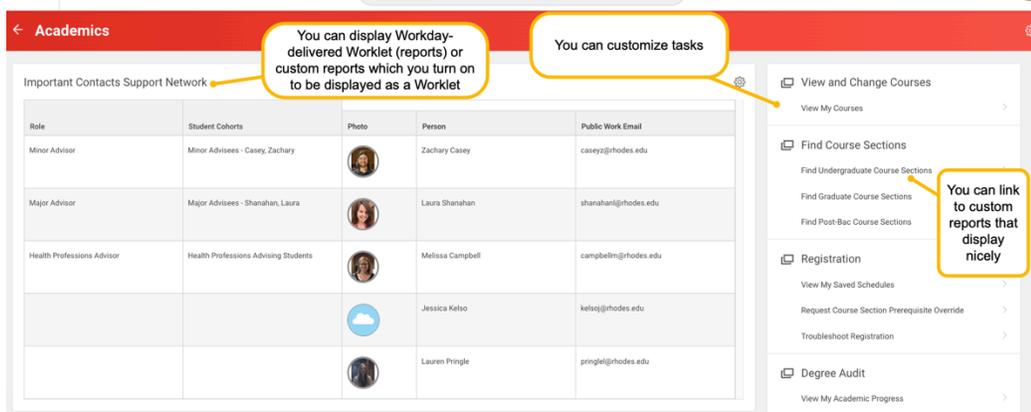
Hub sample:

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:

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 | A ∨ | ≔ 🔗 ✉ | ⤢
                  [   ]
                  [   ]

Dashboard Icon * [_____ ≡]

Dashboard Tabs   ✓

Max allowed tabs is 6.

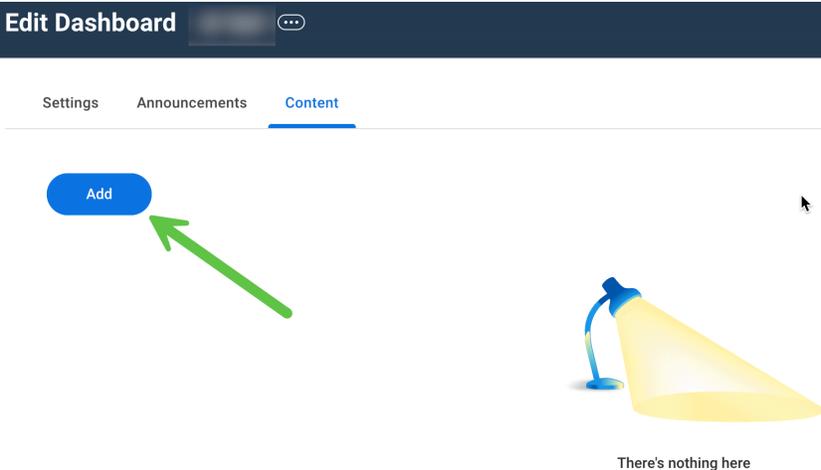Max Worklets Allowed * [6   ]

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 30 ▾   1-30 of 134 items « ‹ **1** 2 3 4 5 › »

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

Edit Dashboard ⋯

Settings   Announcements   **Content**

Add

There's nothing here

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 Cl
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 PI 043 Classroom

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

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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**.

   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.

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.

Updated 1.6.2026

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.

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

13. *(Optional)* Ask a report writer to design a visual report that you can add in the worklet section.
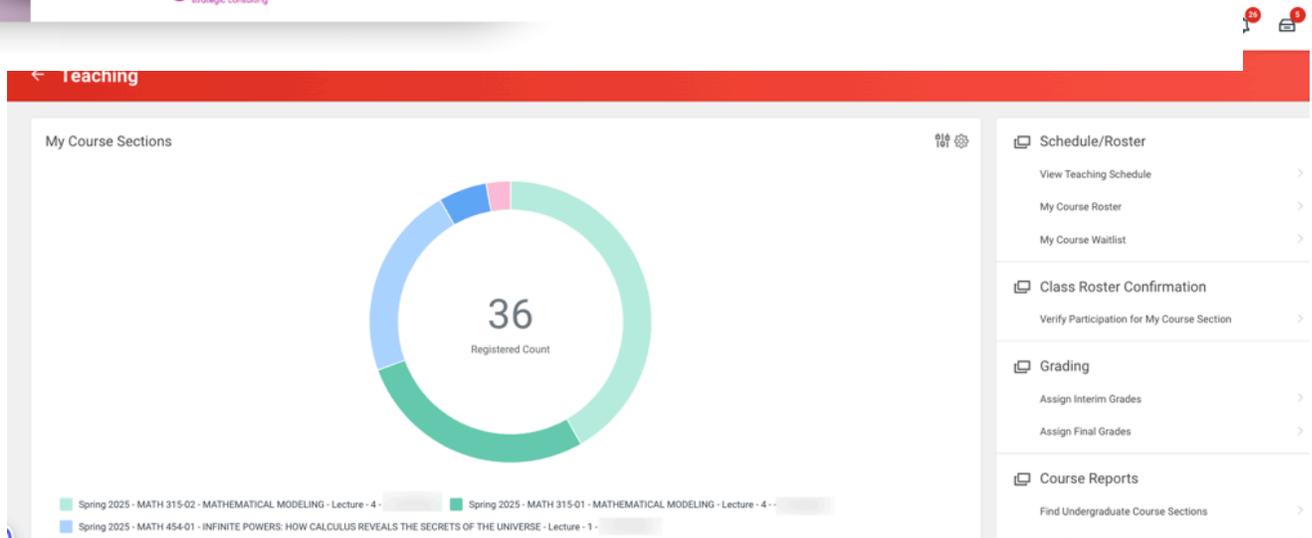
14. Once the dashboard is created, it is available to users via the Search function. To add it to the global Menu navigation, additional steps are required (see Configure Global Navigation).

Edit an Existing Dashboard

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

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

3. 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.
4. 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.
   a. *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

URL - Click to sort/filter

	Quicklink	*Name	*URL	Description	Condition Rule	Used by Group	View Details
⊕		2025-2027 Budget Manual	https://drive.google.com/file/d/1rIPszV7JUcDGRnmMxTpLllJlRj1DE2OG/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_S5wHwvnqRBlaT_AhoaBZtjRNblLFoEg73sOS6zk/template/preview		☰		View Details

Configure Global Navigation

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

2. 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

3. 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.
   a. 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.

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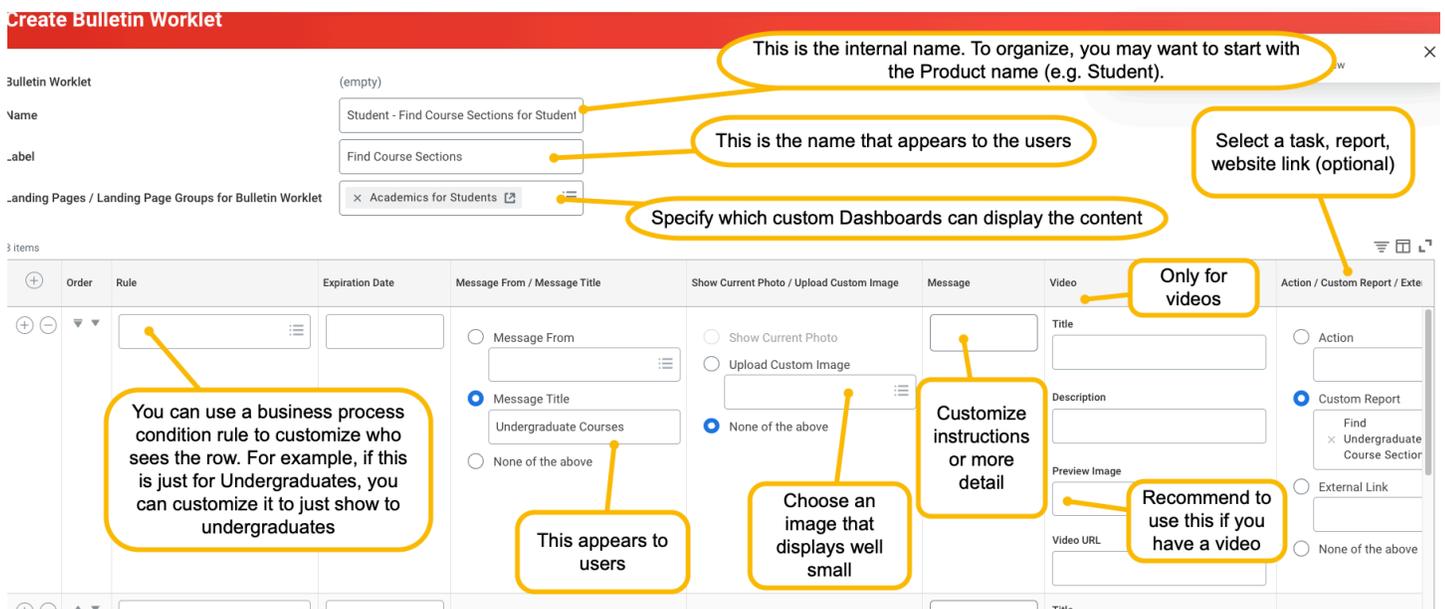
1. Access the **Enable Worklet for Dashboards** task.
2. Select the worklet and select the dashboard you created.

Enable Worklet for Dashboards ✕

Workday Worklet ✱ ✕ Upcoming Registration Appointments

Cancel | OK

Enable Worklet for Dashboards

Workday Worklet   Upcoming Registration Appointments

Enables a Workday delivered worklet to be configured on one or more custom dashboards

Workday Dashboards   Academics

Custom Dashboards   Search

☐ Administrative Assistants Dashboard
☐ Alchemy - Grants Management
☐ Alchemy - Integration Performance
☐ CF TEST

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:

Create Bulletin Worklet

Bulletin Worklet   (empty)

Name   Student - Find Course Sections for Student

This is the internal name. To organize, you may want to start with the Product name (e.g. Student).

Label   Find Course Sections

This is the name that appears to the users

Select a task, report, website link (optional)

Landing Pages / Landing Page Groups for Bulletin Worklet   ✕ Academics for Students ↗

Specify which custom Dashboards can display the content

Order	Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message	Video	Action / Custom Report / Exte

○ Message From
● Message Title
Undergraduate Courses
○ None of the above

○ Show Current Photo
○ Upload Custom Image
● None of the above

Title
Description
Preview Image
Video URL

Only for videos

○ Action
● Custom Report
  Find ✕ Undergraduate Course Section
○ External Link
○ None of the above

You can use a business process condition rule to customize who sees the row. For example, if this is just for Undergraduates, you can customize it to just show to undergraduates

This appears to users

Choose an image that displays well small

Customize instructions or more detail

Recommend to use this if you have a video

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

Updated 1.6.2026

Edit

Tab Name ★ | Registration and Course Management | Prompt Set (All) (empty) | Configurable By User ✓

⌄ **Worklets**

Worklets 3 items

	Order	*Menu Item	*Security Groups	Required?	Worklet Size	Workday Worklet Title	Rename Menu Item
⊕ ⊖	▼ ▼	× Upcoming Registration Appointments	× Student as Self ⋯	✓	2x		
⊕ ⊖	▲ ▼	× My Holds	× Student as Self ⋯	✓	2x		
⊕ ⊖	▲ ▲	× Find Course Sections	× All Users ⋯	☐	1x		

Add the bulletin worklet to the custom dashboard

Select if users must see it (recommended)

Determine the size. It's often best to play around the with size and order until you're happy with the view.

> Menu

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.

4. Click the **+** sign.

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.

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.

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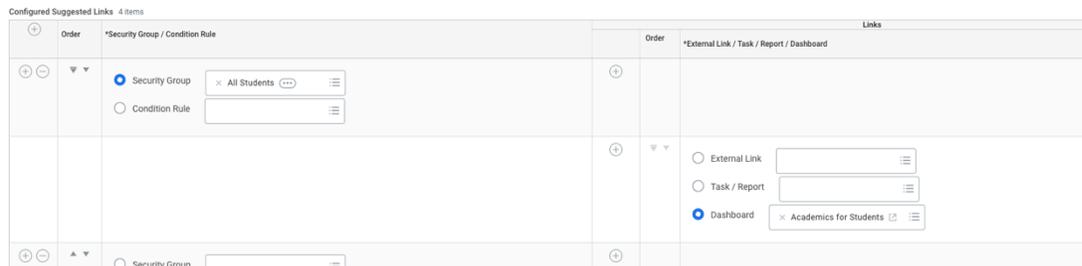

5. You can customize the Navigation items Workday provides in the Hubs.

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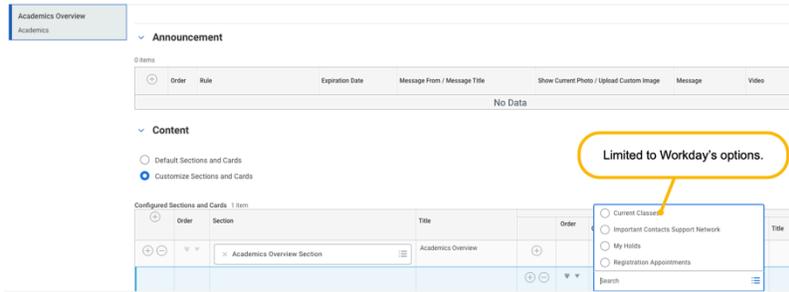
6. In the **Configure Suggested Links**, you can add custom tasks/reports. If you add the dashboard, it allows students to return to that dashboard in the navigation.

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**.