OREGON DEPARTMENT OF
Human Services

WORKDAY

General Navigation for Workday

During January through March of 2022, several large changes were made to the Workday software. The instructions below provide high-level instructions to help Learners get around Workday's updated user interface.

Contents of this job aid

Click a link below to view specific content:

Workday homepage overview

**Homepage:** After signing into Workday at https://wd5.myworkday.com/oregon, arrive at the new Workday homepage. This page is designed to quickly deliver relevant information to each user. Because of this, each individual's homepage may look slightly different from the image on the following page:
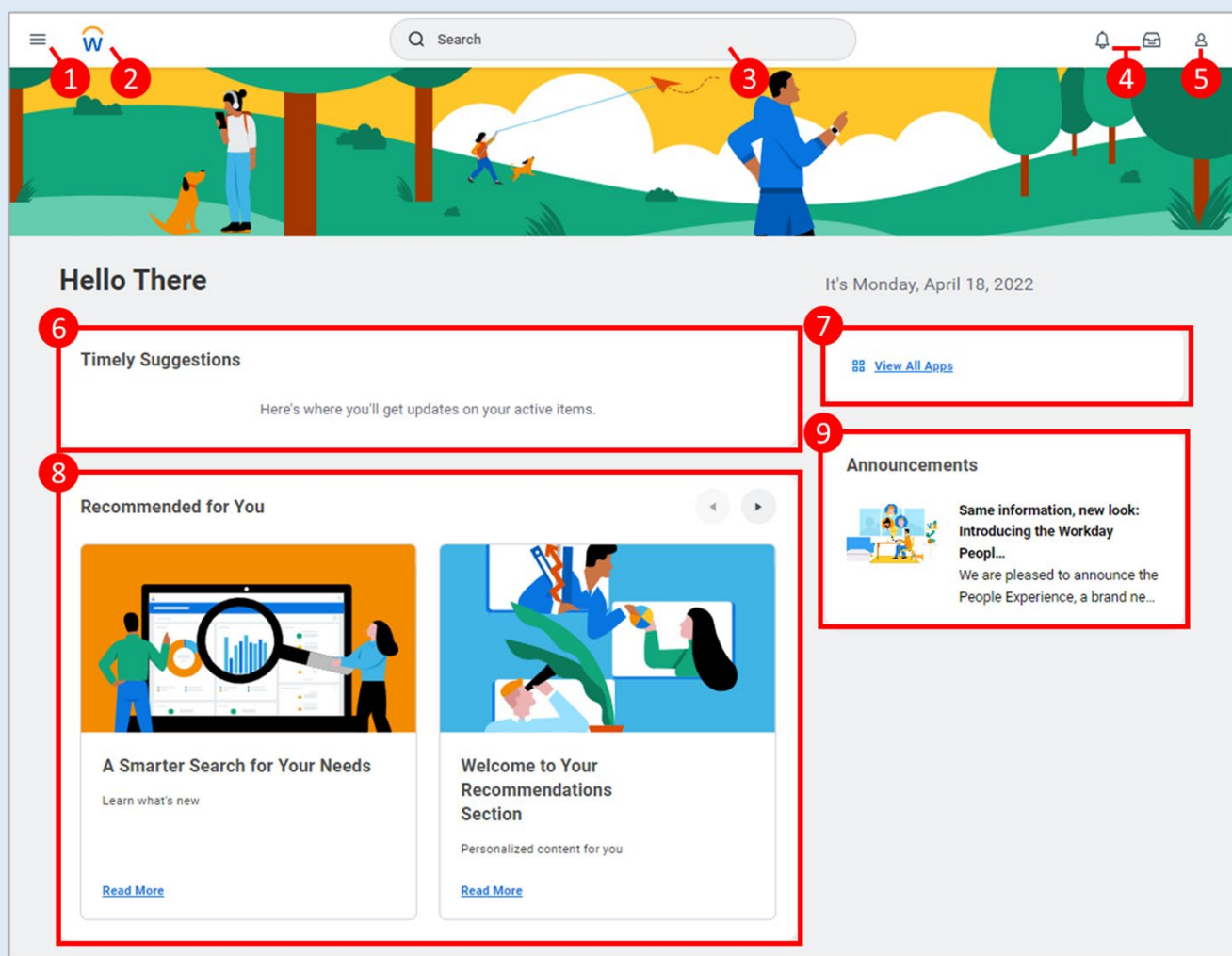
1. <u>Three-bar Icon</u>: Opens a navigation panel to quickly access your Workday applications (apps) and shortcuts. <u>Click here</u> to learn more.
2. <u>Workday Icon</u>: Click to return to the Workday homepage from anywhere in Workday.
3. <u>Top Search Bar</u>: Search for tasks, reports, and courses. <u>Click here</u> to learn more.
4. <u>Notification Bell & Inbox</u>: Workday system communications to Learners. <u>Click here</u> to learn more.
5. <u>Profile Icon</u>: Learner profile information. <u>Click here</u> to learn more.
6. <u>Timely Suggestions</u>: These suggestions are populated based on pre-determined tasks each person might consider reviewing.
7. <u>View All Apps:</u> Select this link to display the *All Apps* window where users will find apps like their *Learning* app. <u>Click here</u> to learn more.

8. <u>Recommended for You</u>: This section provides content based on the individual's role in Workday, recent activity, and more.
9. <u>Announcements</u> – Important information will be shared in this section. Not all announcements will be directly related to Workday; some may provide enterprise-wide or role-specific information.

Three-bar icon: This icon (≡) in the upper left corner of the Workday window opens a navigation panel with access to (1) Apps and (2) Shortcuts as described below. Like the Workday home icon and the top search bar, the 3-bar icon is always on the top of every page of Workday. This makes getting to this feature very quick.
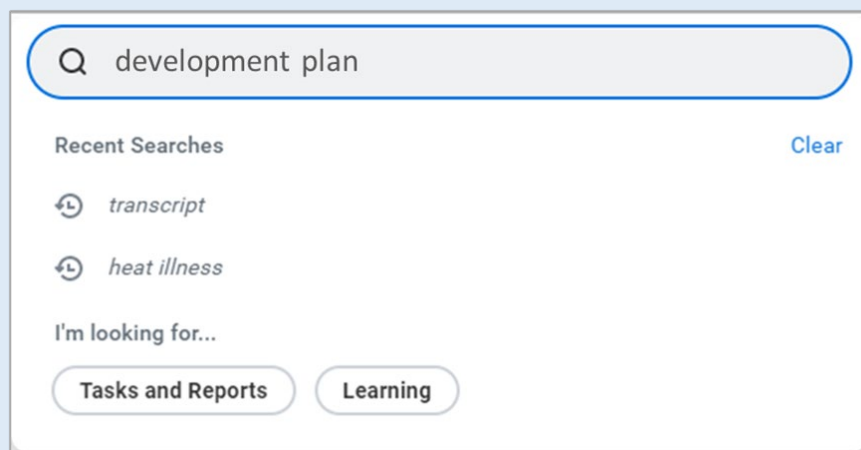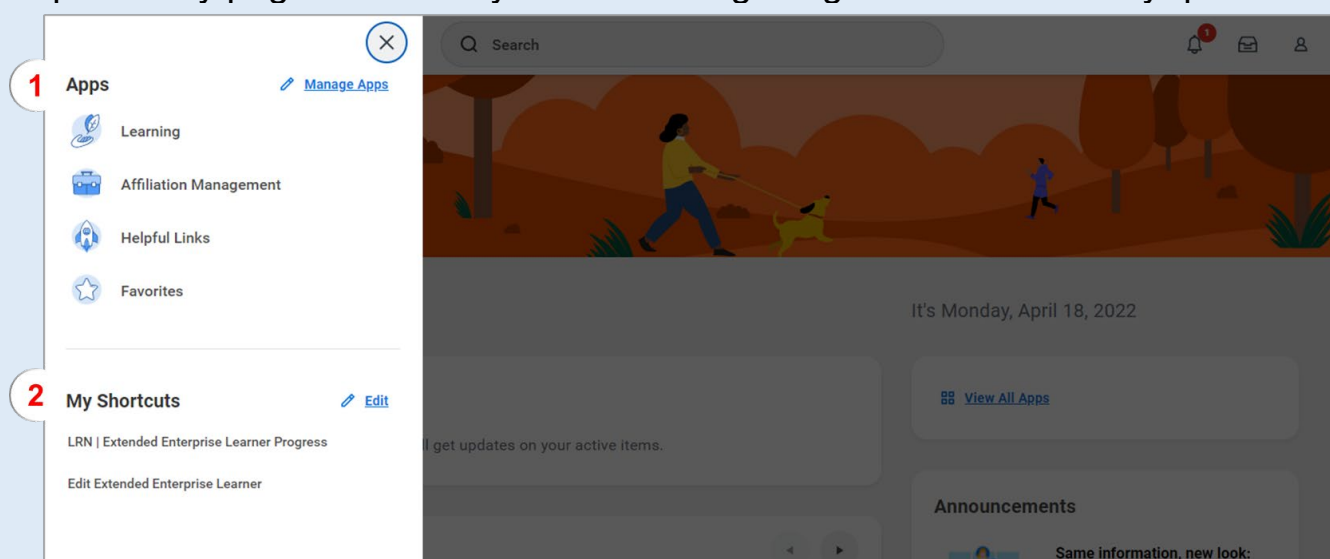

1. Apps:
   a. Apps automatically appear when a Learner has a new app added to their profile in Workday.
   b. The **Learning app** appears here and at the *All Apps* window. Use the *Learning* app to navigate to the *Learning Home* dashboard.
   c. The **Learning Admin app** is now a link included on the *Learning Home* dashboard. Click the *Learning app* to access *Learning Admin*.
   d. To re-arrange the order of your apps, click the *Manage Apps* link.
      i. When the *Manage Apps* window opens, left-click on an app and drag it up or down the list to change the order of its appearance. The order in which apps appear in this window will be the same order they appear in the *View All Apps* window.
      ii. Click the *Save* link at the top of the window to save the new order.

2. My Shortcuts:
   a. A shortcut is a link that opens a frequently used task or report in Workday.
   b. To add or change shortcuts, click the *Edit* link.
   c. On the *Configure Shortcuts* page, click the *+Add* link to add a shortcut
   d. Enter the name of the Workday task or report you wish to create a shortcut for.
   e. Click the *OK* button to save your changes.

Top search bar: Using the search bar at the top of Workday is a fast way to navigate within Workday once familiar with the tasks, reports and courses Learners will use. Learners can apply categories – such as *Tasks and Reports* or *Learning* as shown below when using the search bar to narrow results to that specific category.


Learners can search for specific courses using the search bar, but it will only return results when the search term is in the course title. If you use the search bar to locate a course and do not find what you are looking for, navigate to *Browse Learning Content* and search for the course there. The search function in *Browse Learning Content* allows for searching not only words in the title, but also content in the course description.

Notification Bell and Inbox: These two items are found in the upper right corner of the Workday screen. Staff and partners will use the Notification Bell and Inbox action items to support their overall Workday experience. Users receive notifications and action requests generated by the Workday system.


🔔 Notification Bell messages include assigned learning, enrollment into paid courses, change in course offering details, etc. Notifications will stay visible for at least 30 days, even after they have been viewed. If they have not been viewed, they will stay on the list indefinitely. To see only Unread notifications, switch to *Viewing: Unread.*

🗃 Inbox action items include requests to complete content that has been saved for later, drop and enrollment deadline setup, and other Manager and employee actions to complete in Workday.

ODHS

Profile icon: Click this icon in the upper right corner of the Workday screen to view and edit Learner profile information.
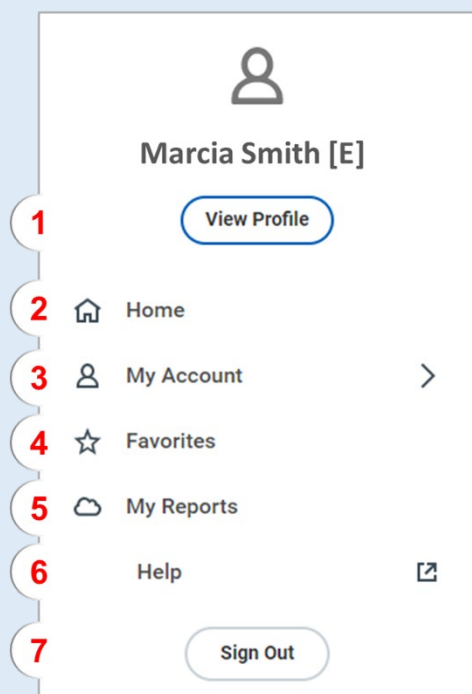

1. View Profile: View Learner profile information such as name, user name, email address, extended enterprise affiliation, and extended enterprise learner type.
2. Home: Return to the Workday homepage.
3. My Account: Learner can change their password and manage their challenge questions from here.
4. Favorites: If a Learner has marked a course or a report as a favorite, those items will appear here and can be managed. This is not usually relevant to the EELearning environment.
5. My Reports: Not relevant to the EELearning environment.
6. Help: Navigates the Learner to the Workday Oregon support page at https://www.oregon.gov/das/HR/pages/workday.aspx
7. Sign Out: Signs the Learner out of Workday. Closing the browser window does the same thing.

View All Apps: Click this link to show a window listing all apps available to the Learner. While the display looks different than the apps listed after clicking the 3-bar icon noted above, the apps are the same – and they're in the same order.
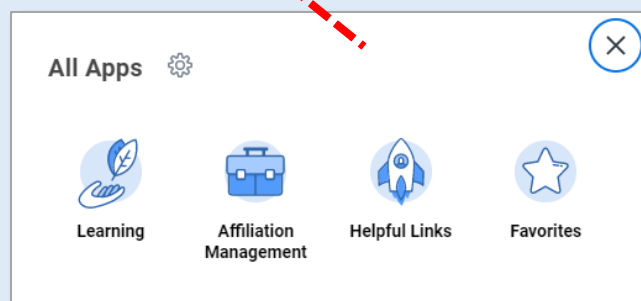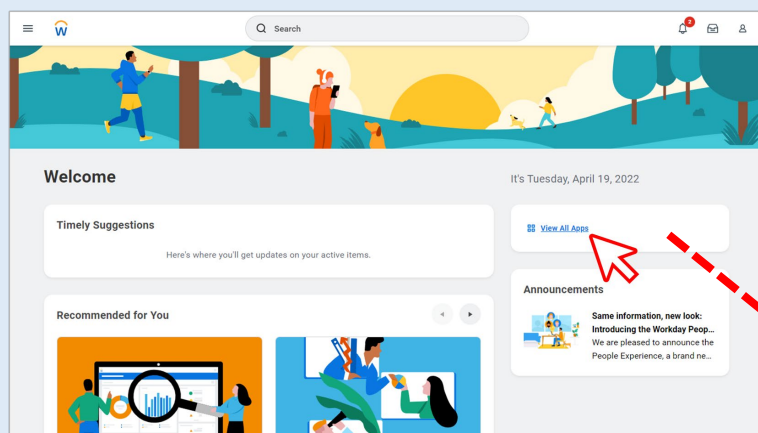
Find courses and get around the Learning pages

Learning Home: When a Learner clicks the *Learning* app from the 3-bar icon or the View all apps window, they arrive at the *Learning Home* page (also referred to as a dashboard). Follow the numbered items for a description of each section below:
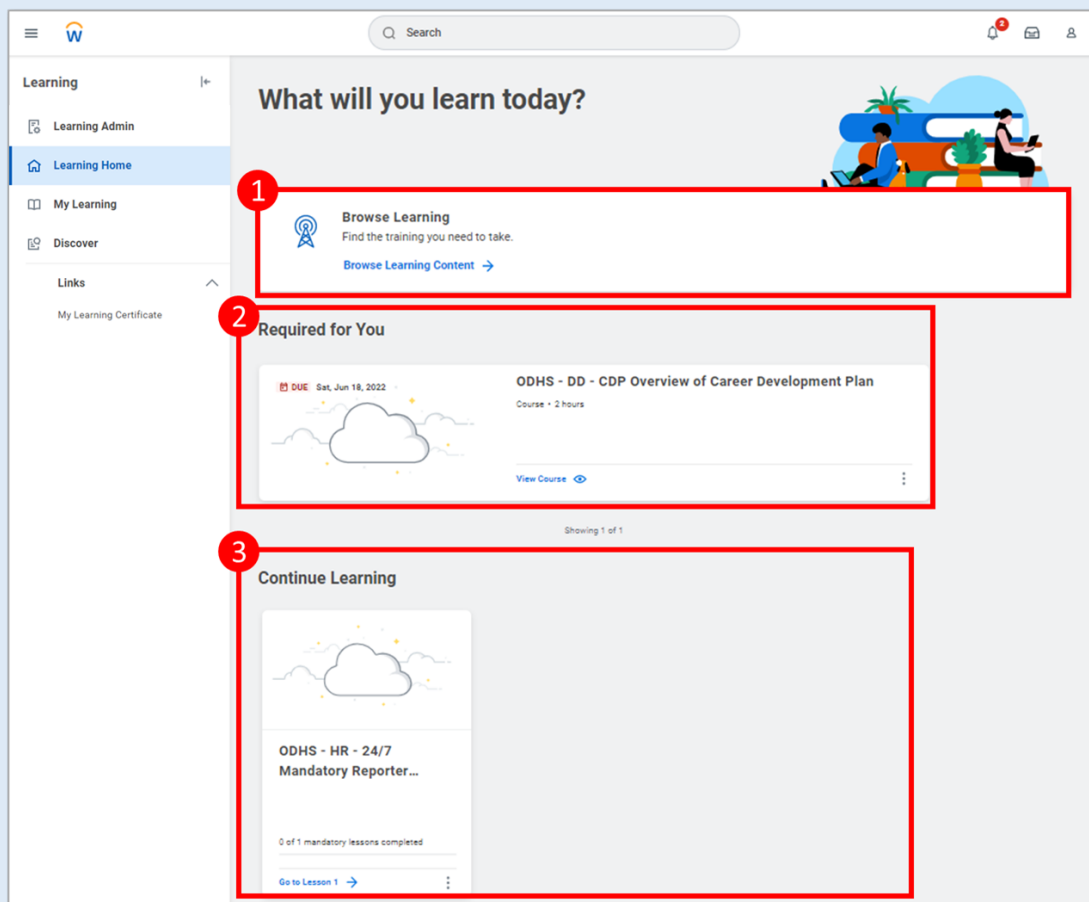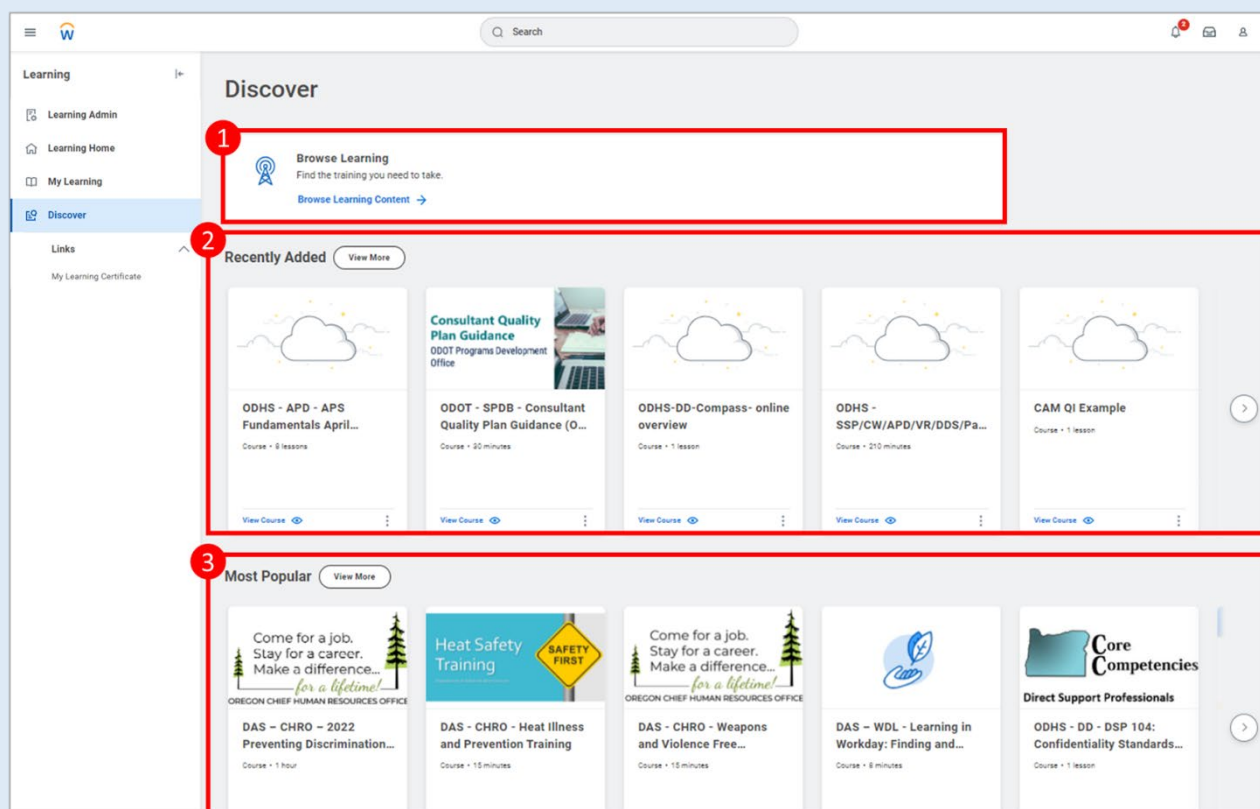

1. Browse Learning: One way to **find a course** is to click the *Browse Learning Content* link in this banner. Once at the *Browse Learning Content* page, enter a few key words from the course's title in the search bar under the blue title bar. When results appear, use the filter checkboxes on the left to narrow the results.
2. Required for You: This section appears only if a Learner has training assigned to them to complete. Click courses in this section to start or continue training. Courses with a specific due date will have a *Due* or *Overdue* date in the upper left corner of the course card as a reminder.
3. Continue Learning: If a Learner has started one or more courses that have not been completed, they will appear in this section. Click a course card from here to return to the course.

My Learning: Once at the *Learning* dashboard, click the *My Learning* link on the left to go to the *My Learning* page. Follow the numbers below for a description of each section illustrated.
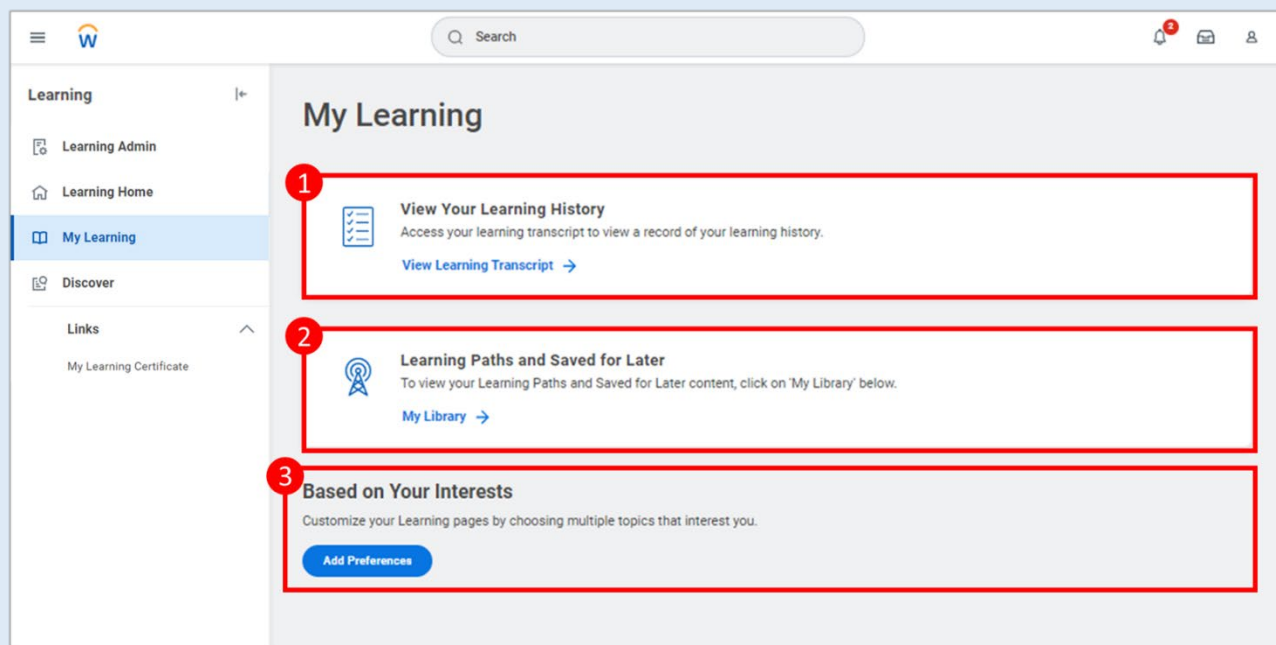
1. View Your Learning History: This link takes the Learner to their Workday learning record where they can see assigned courses not yet started, courses in progress, and courses completed.
2. Learning Paths & Watch Later: This link takes the Learner to their personal Workday Learning library where they can access learning paths they have created or have had shared with them. They can also view courses they have marked as "Saved for Later."
3. Based on Your Interests: If a Learner has selected topics for their Learning Preferences (do this by clicking here, or search for "Learning Preferences" in top search bar), courses aligned to those preferences will show here.

Discover: Once at the *Learning* dashboard, click the *Discover* link on the left to go to the *Discover* page. Follow the numbers below for a description of each section illustrated.


1. Browse Learning: One way to **find a course** is to click the *Browse Learning Content* link in this banner. Once at the *Browse Learning Content* page, enter a few key words from the course's title in the search bar <u>under</u> the blue title bar. When results appear, use the filter checkboxes on the left to narrow the results.
2. Recently Added: This section lists courses recently added to Workday that align with a Learner's agency or affiliation, and only displays courses that the Learner has access to.
3. Most Popular: Similar to the Recently Added section, this section displays a customized list for the Learner of courses most frequently completed by those in their agency and who have similar access to Workday.

Access elevated Workday Learning roles

If a Learner has an elevated role in Workday Learning, they can access their associated tools as described below for each role:

1. <u>Affiliation Managers</u>: Those with the role of Affiliation Manager will find the app in Apps section under the [3-bar icon](#), and in the [All Apps](#) window.
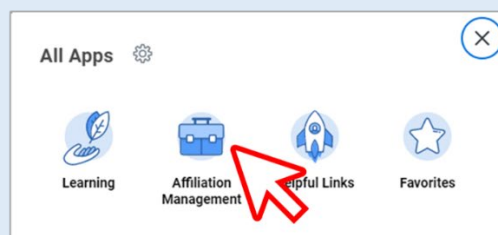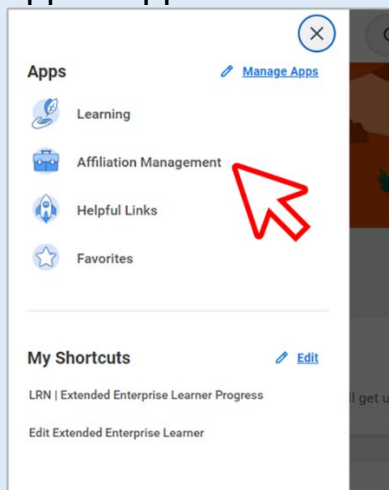
2. <u>Content Creators</u>: Those with the role of Content Creator will notice that the *Learning Admin* app no longer appears in the [All Apps](#) window. The *Learning Admin* link is now at the top of the *Learning* dashboard's left navigation panel.
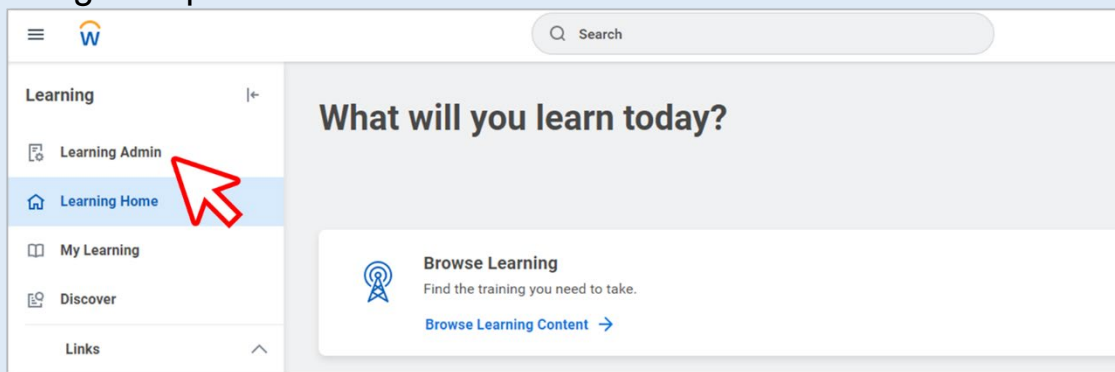

3. <u>Internal and External Learning Trainers/Instructors</u>: Like the Affiliation Manager role noted above, Instructors can find the *Learning Trainer* app in the Apps section under the [3-bar icon](#), and in the [All Apps](#) window. Click the *Learning Trainer* icon to access all tools to support that role.

## General tips for using Workday

Configure search results:

If you aren't getting the search results for courses you expect, this could be because you're only seeing Workday's default search option which shows *Tasks and Reports*, and *Articles* as illustrated below:
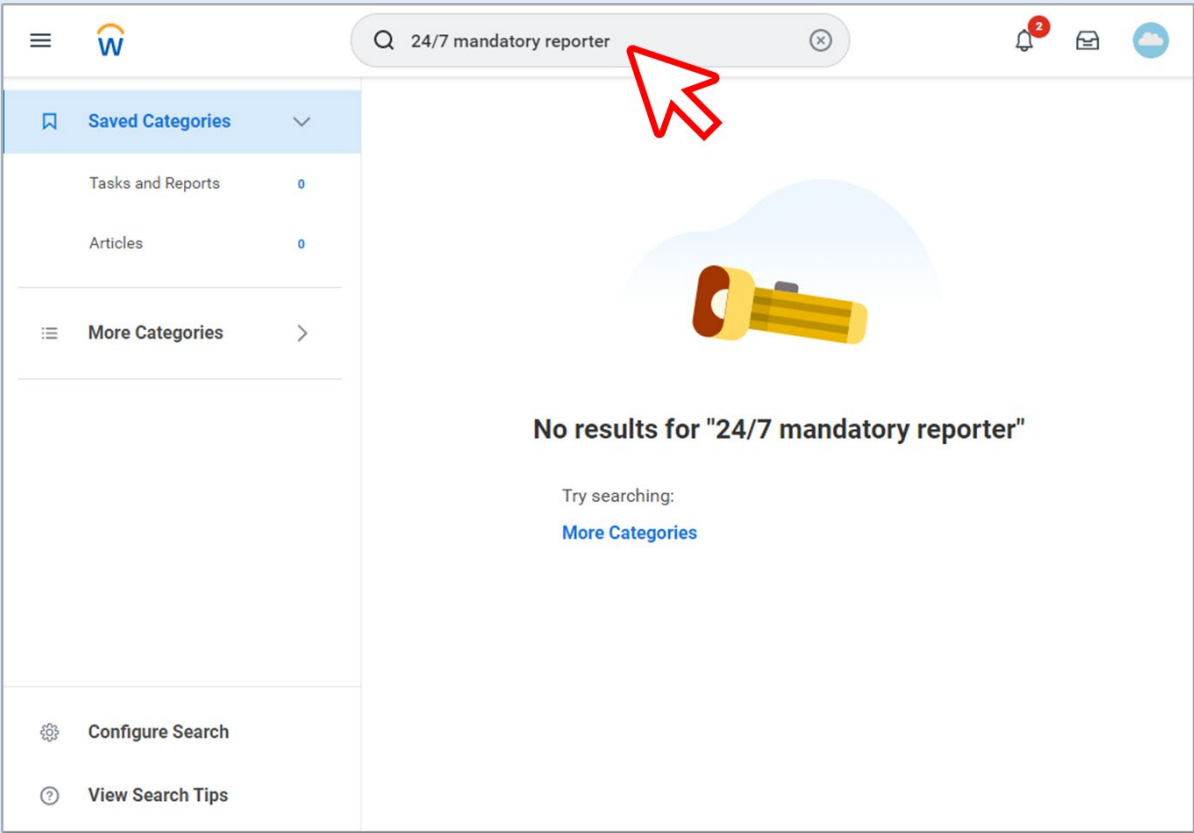
To see the search results for learning content such as courses, follow these steps:

1. After searching for a course or a program from the top search bar, navigate to the lower left corner of the search results screen and click the *Configure Search* link.
2. Then, find *Learning* in the *More Categories* section near the bottom of the *Configure Your Search* window. Click *Learning* and drag it to the top of the *Saved Categories* section.
3. Click *Save* to update your search categories (sometimes you may need to scroll down to see the *Save* button).
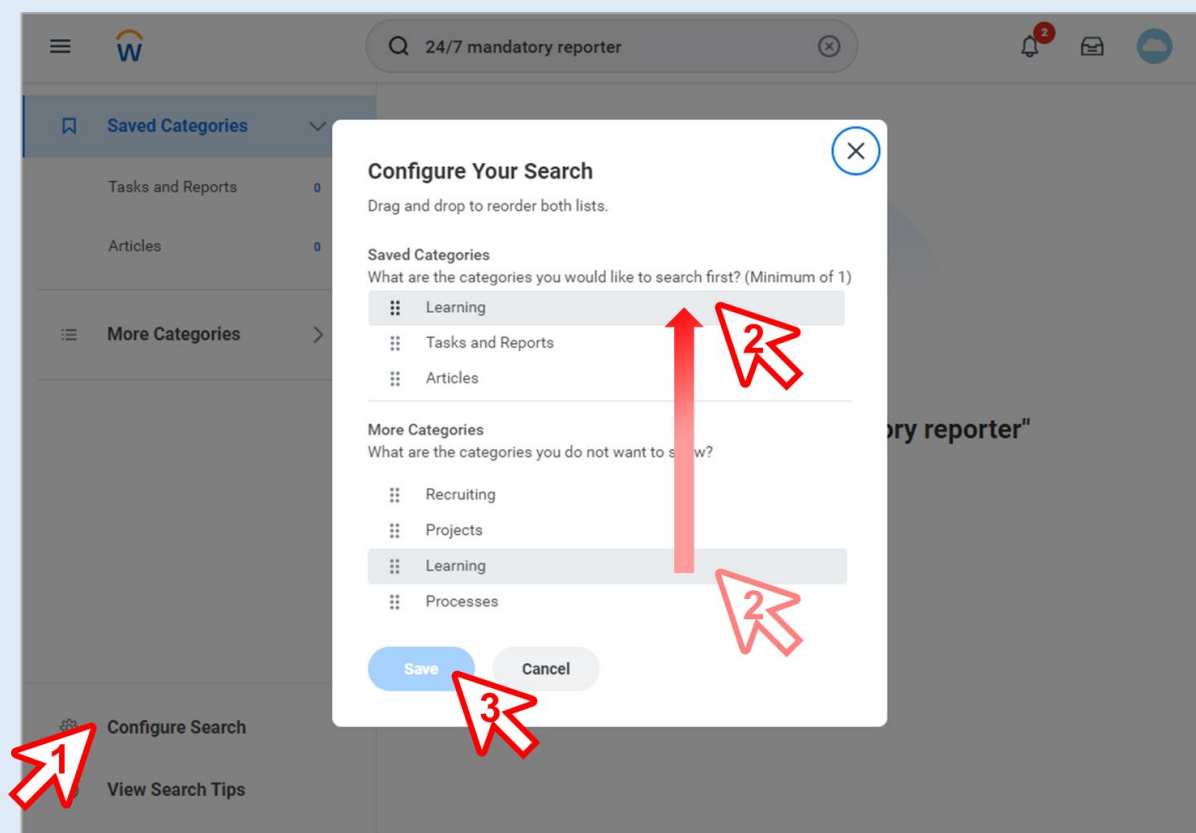
With *Learning* as a category showing in your *Saved Categories*, you'll now see search results for courses and programs.
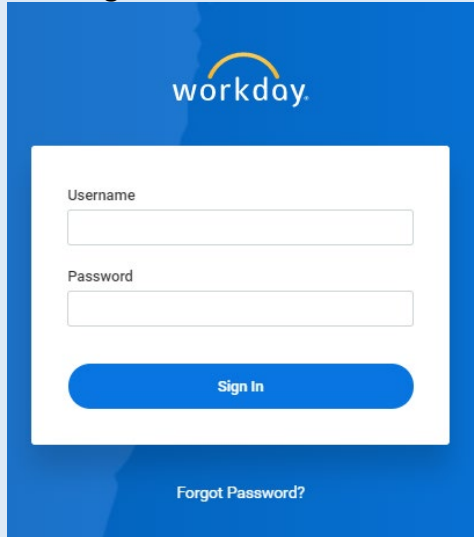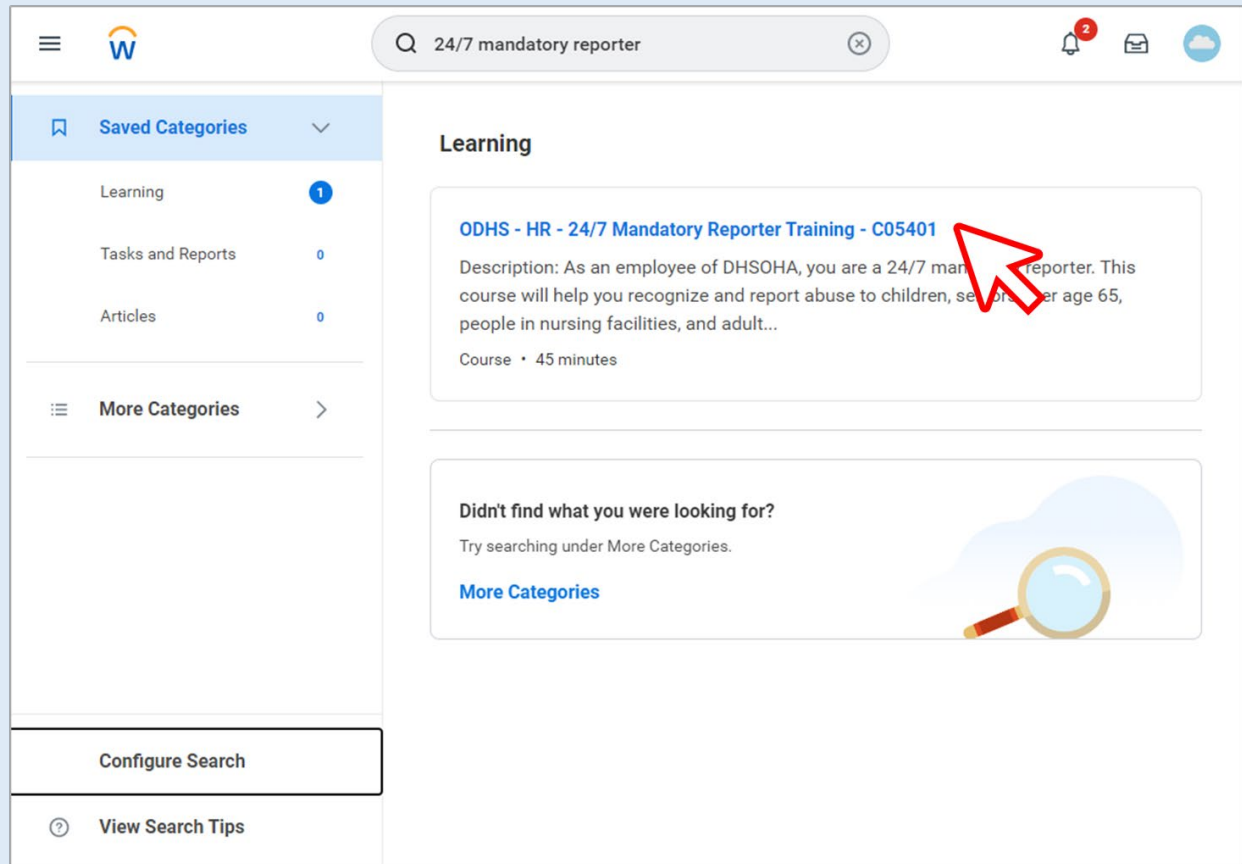

Ways to further improve search results:
1. The fewer words you enter in the search box, the greater number of results you'll get.
2. The more words you enter in search, the more specific (fewer) results you'll get.
3. Be sure to spell the words correctly; Workday can't accommodate incorrect spelling.
4. Include *ODHS* in your search words if you know you're looking for an ODHS-specific course or program
5. Type ? (a question mark) in the search box and click *Enter* key for a list of other Workday search tips

Optimize Space: To make the most of the space available on screen, Learners can click the expand/collapse toggle on the left navigation side bar to change the amount of space used by the left side bar as shown below:
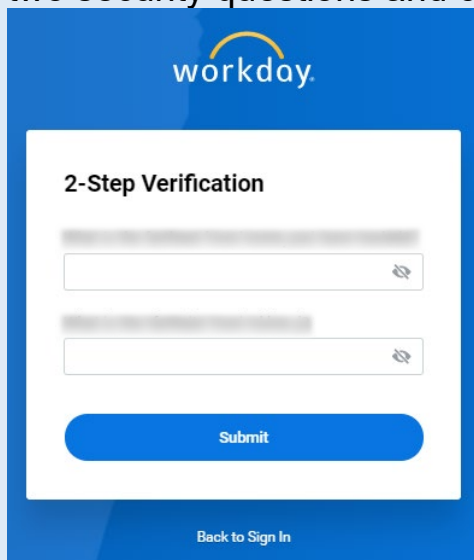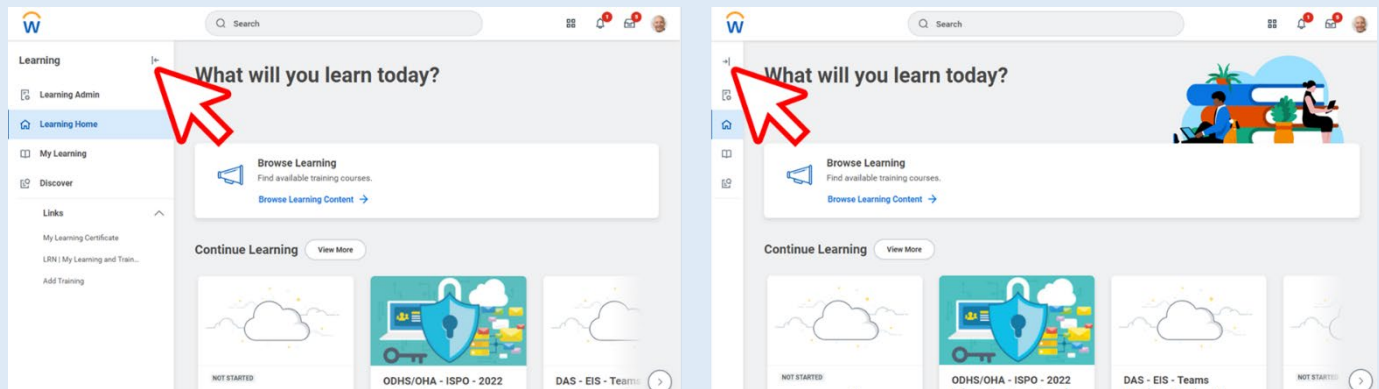
Log in to Workday

1. From a computer with a secure internet connection, go to the Workday login screen by clicking this link or entering it into a web browser such as Microsoft Edge, or Mozilla Firefox: https://wd5.myworkday.com/oregon/

2. At the Workday log in screen, enter your username and password. Then click the *Sign In* button. Your username is your OR#, EEL# or CW#.

3. This will take you to the 2-Step Verification screen. Enter the answers to your two security questions and click the *Submit* button.

* * * END OF JOB AID * * *