



# Leveraging Workday 'Content' Dashboards - to make it easier to use Workday



By Keith Bitikofer  
EMD / EnterpriseMarketdesk Consultant

Wycliffe Bible Translators  
Workday Product Manager



# Agenda

How to leverage Workday Content Dashboards



**Why is this important?**



**What is the issue?**



**What is a 'Dashboard'?**



**'Content' Dashboards**



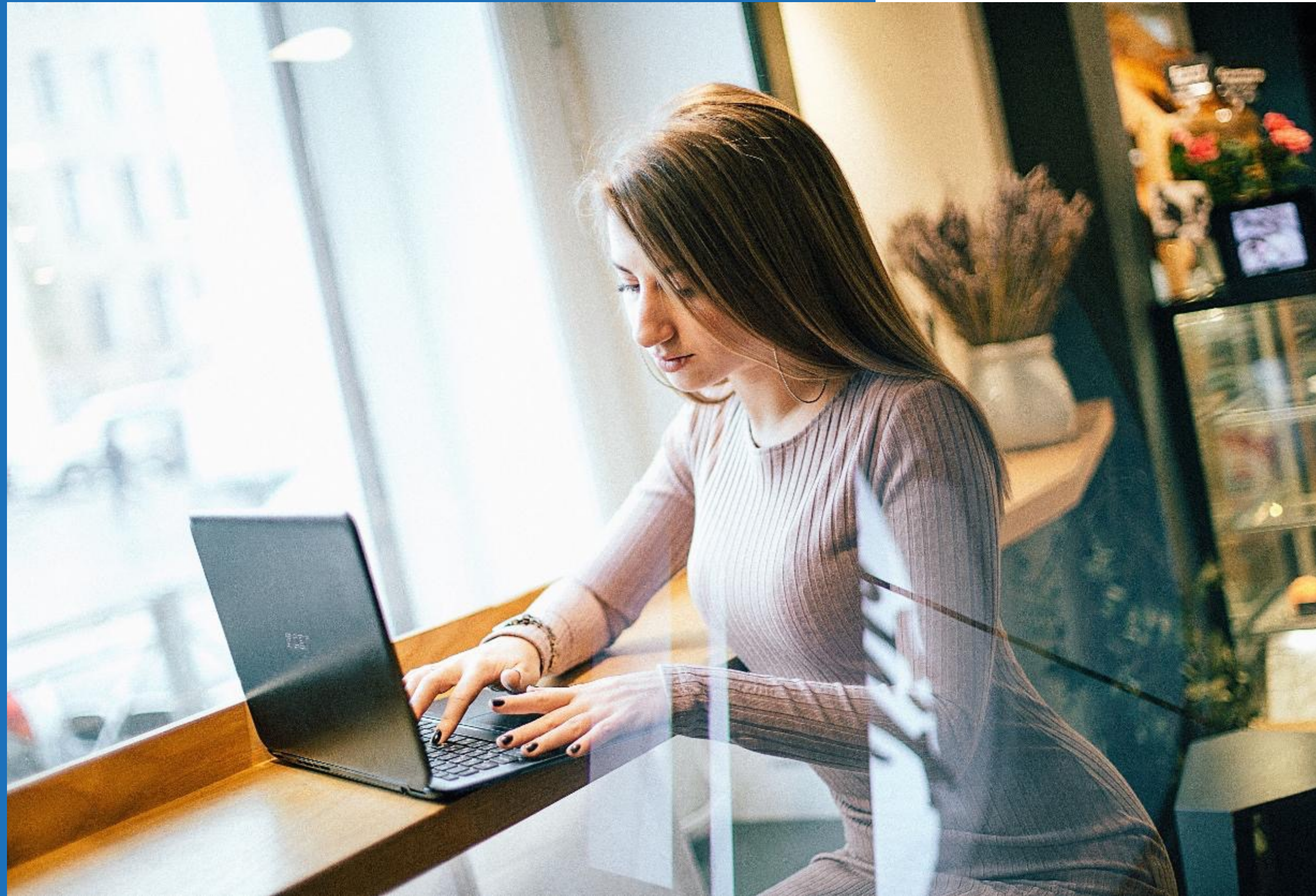
**How To's**



**Q&A**

# Why is this important to me?

Content Dashboards can have a HUGE impact!



## **Workday First Perspective**

- The first question is-  
Is there a way to do this IN Workday?



## **Want our staff to USE Workday**

- Always be looking for ways to improve your users' experience



## **Want to Drive our staff to Workday**

- Give your staff as many reasons as possible to go to Workday. Then, hopefully, they will complete their Inbox tasks as well!



## **Many Customers / Consultants don't know about this**

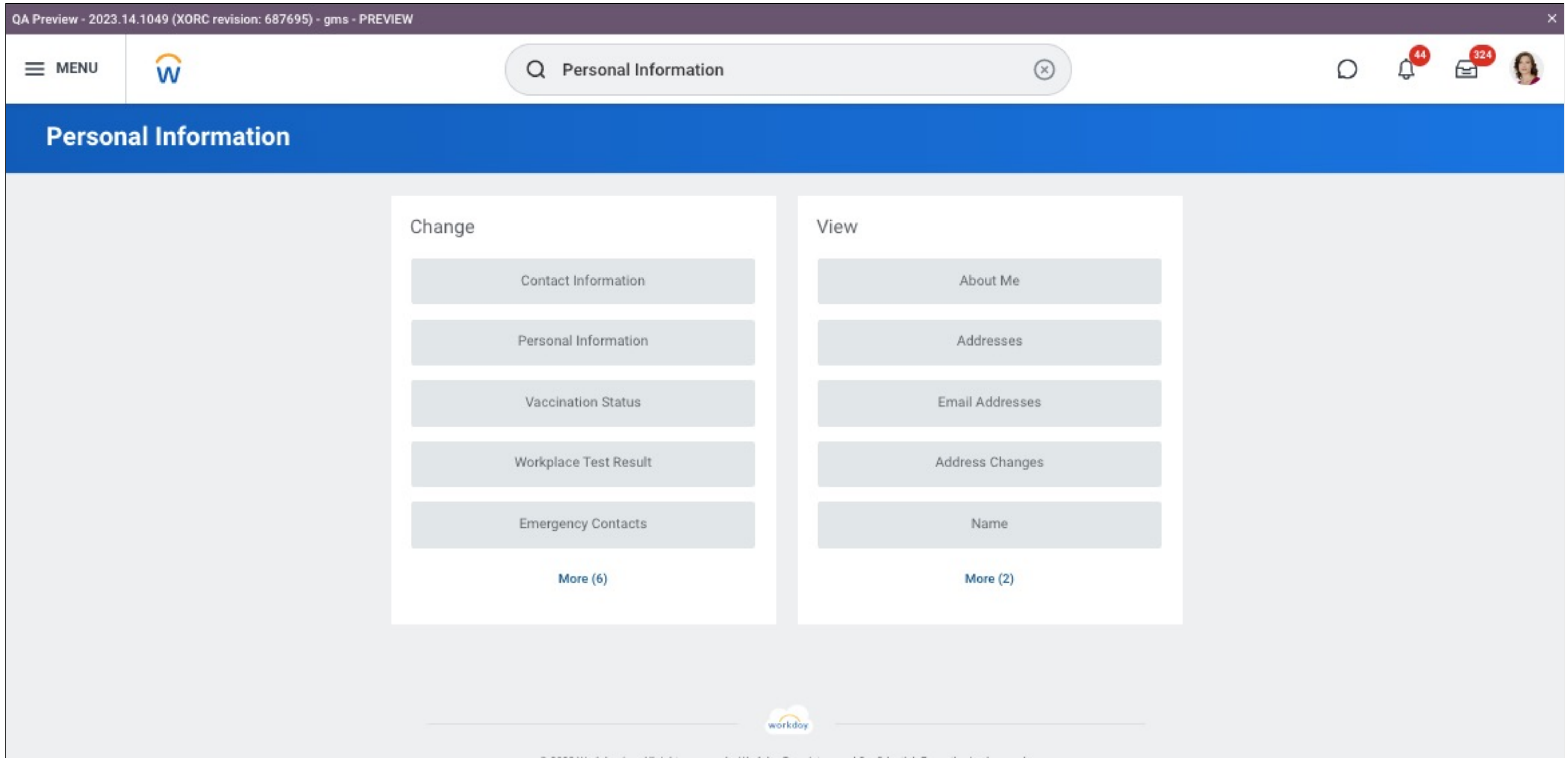
# What is the issue?

- ▶ Can be hard for *end users* to find what they want
- ▶ Can be hard to direct end users to what you **WANT** them to do  
(Workday Help and Journeys SKU's help, but many companies don't have them yet).

The GOAL is to  
make life easier  
for your USERS!

# Workday Dashboards

Default Personal Information Worklet – Very Limited!



The screenshot shows a web browser window displaying the Workday Personal Information dashboard. The browser's address bar shows "QA Preview - 2023.14.1049 (XORC revision: 687695) - gms - PREVIEW". The page header includes a "MENU" button, the Workday logo, a search bar with "Personal Information", and notification icons for 44 messages and 324 alerts. The main content area is titled "Personal Information" and is divided into two columns: "Change" and "View".

Change	View
Contact Information	About Me
Personal Information	Addresses
Vaccination Status	Email Addresses
Workplace Test Result	Address Changes
Emergency Contacts	Name
More (6)	More (2)

The Workday logo is visible at the bottom center of the page.

# Workday Dashboards

User Profile Page – can be OVERWHELMING to end users

QA Preview - 2023.16.1060 (XORC revision: 690600) - gms - PREVIEW

MENU

Search

Personal Information | IDs | Documents | Vaccinations | Workplace Tests

Logan McNeil  
Vice President, Human Resources

Actions

Phone | Email | Team

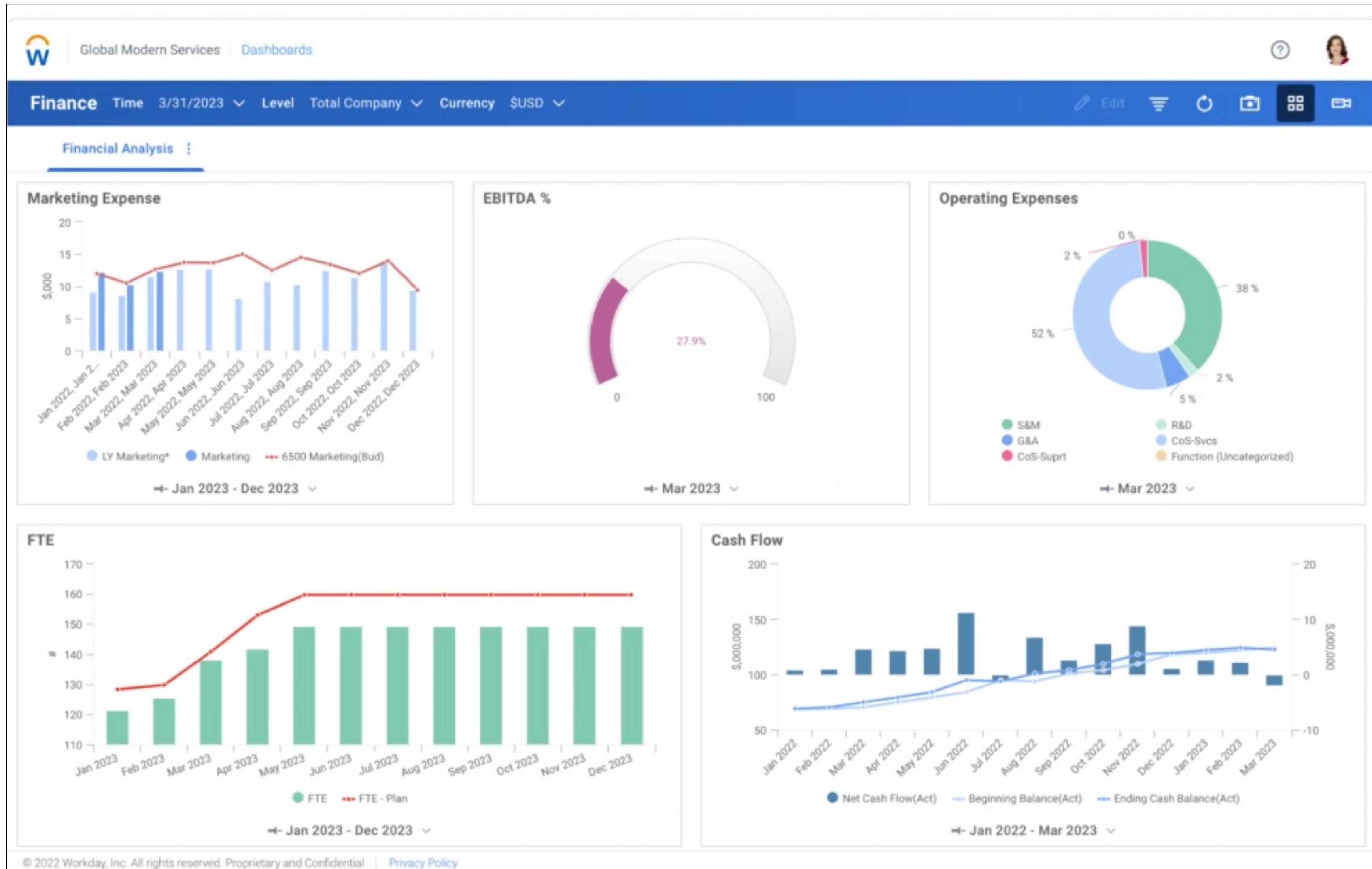
- Summary
- Job
- Contact
- Personal
- Compensation
- Benefits
- Pay
- Performance
- Career
- Feedback
- More (3)

**Personal**

Gender	Female
Date of Birth	05/25/1970
Age	52 years, 10 months, 23 days
Marital Status	Married (United States of America)
Hispanic or Latino	
Race/Ethnicity	White (United States of America)
Race/Ethnicity Details	British
Citizenship Status	Citizen (United States of America) Naturalized Citizen (United States of America)
Sexual Orientation	(empty)
Gender Identity	(empty)
Pronoun	(empty)

# Workday Dashboards

Is this what you think of?



# Dashboards can do so MUCH more!

## 'Content' Dashboards!

- ▶ Anything but Numbers!
- ▶ What do your users need easy access to?
- ▶ What do they forget about?
- ▶ Do they forget the names of reports?

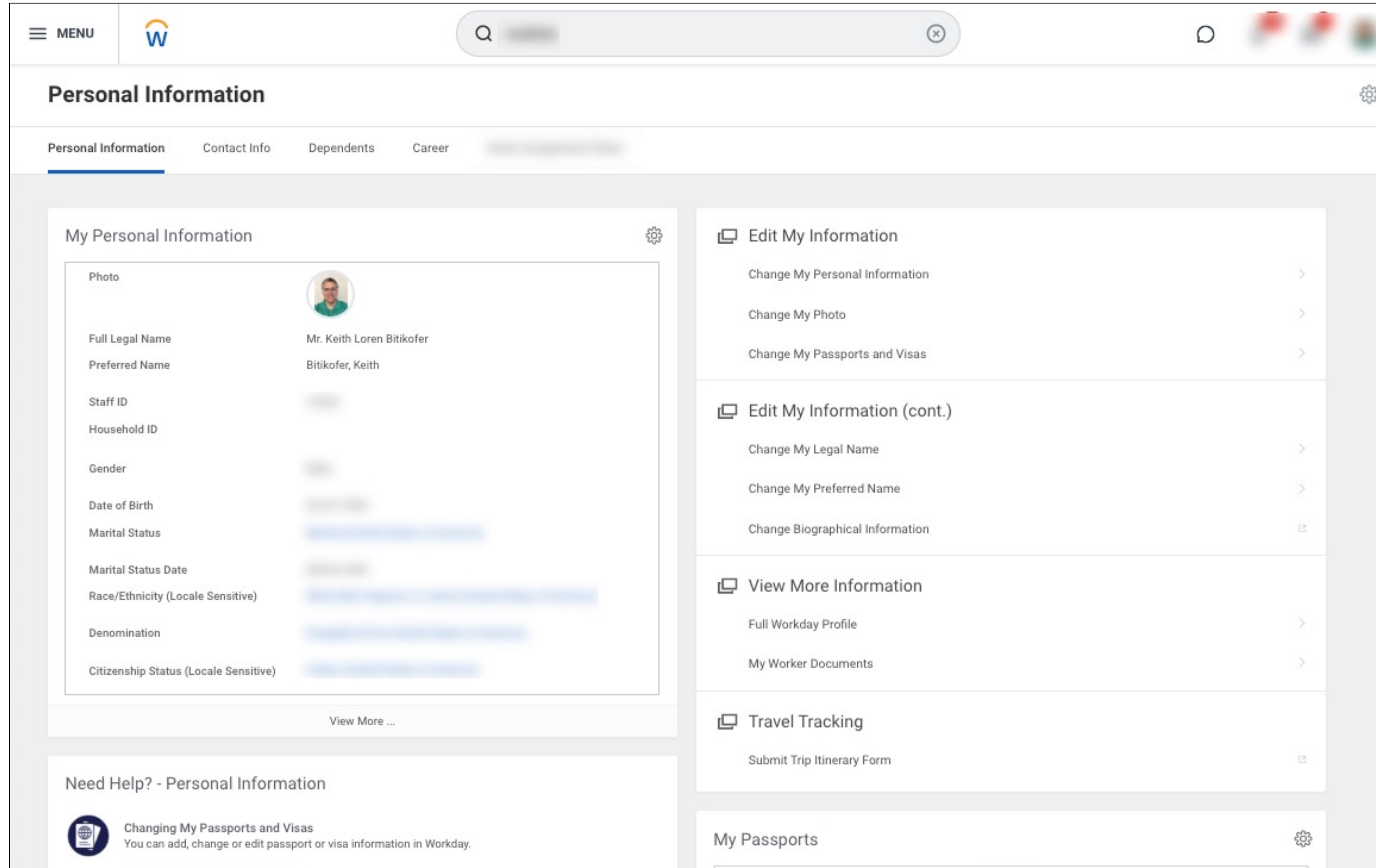


*The GOAL is to  
make life easier  
for your USERS!*

# Content- Worker Personal Info Dashboard

Make  
CONTENT  
easy to find  
and use!

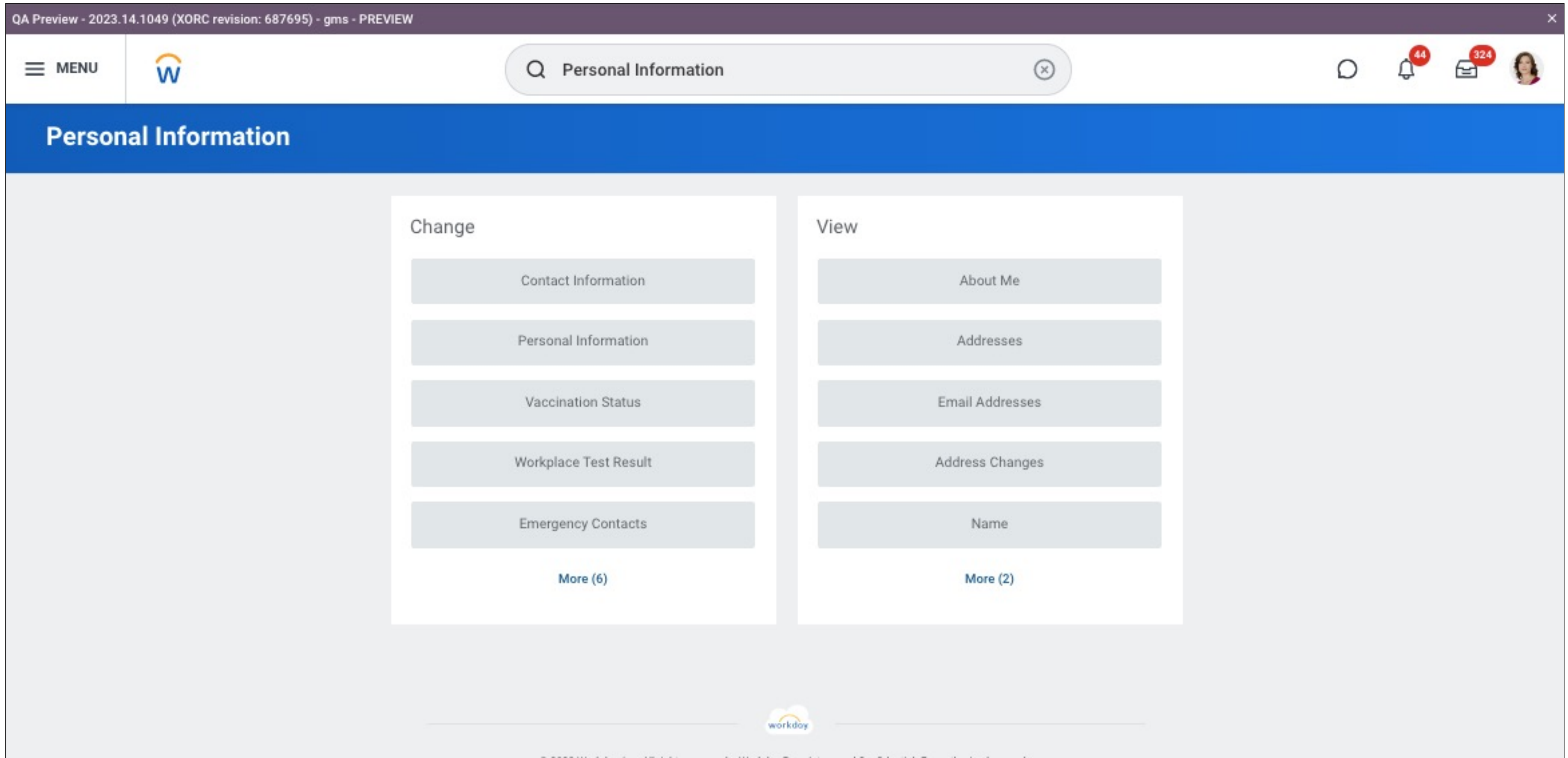
Configured  
just for YOUR  
staff!



The screenshot shows a user interface for a worker's personal information dashboard. At the top, there is a navigation bar with a 'MENU' icon, a 'W' logo, a search bar, and notification icons. Below the navigation bar, the main heading is 'Personal Information'. Underneath, there are tabs for 'Personal Information', 'Contact Info', 'Dependents', and 'Career'. The 'Personal Information' tab is active, showing a profile card for 'Mr. Keith Loren Bitikofer'. The profile card includes a photo, full legal name, preferred name, and various identification numbers. To the right of the profile card, there are three sections for editing information: 'Edit My Information' (with options for personal info, photo, and passports), 'Edit My Information (cont.)' (with options for legal name, preferred name, and biographical info), and 'View More Information' (with options for full workday profile and worker documents). Below these sections is a 'Travel Tracking' section with a 'Submit Trip Itinerary Form' button. At the bottom, there is a 'Need Help? - Personal Information' section with a link to 'Changing My Passports and Visas'.

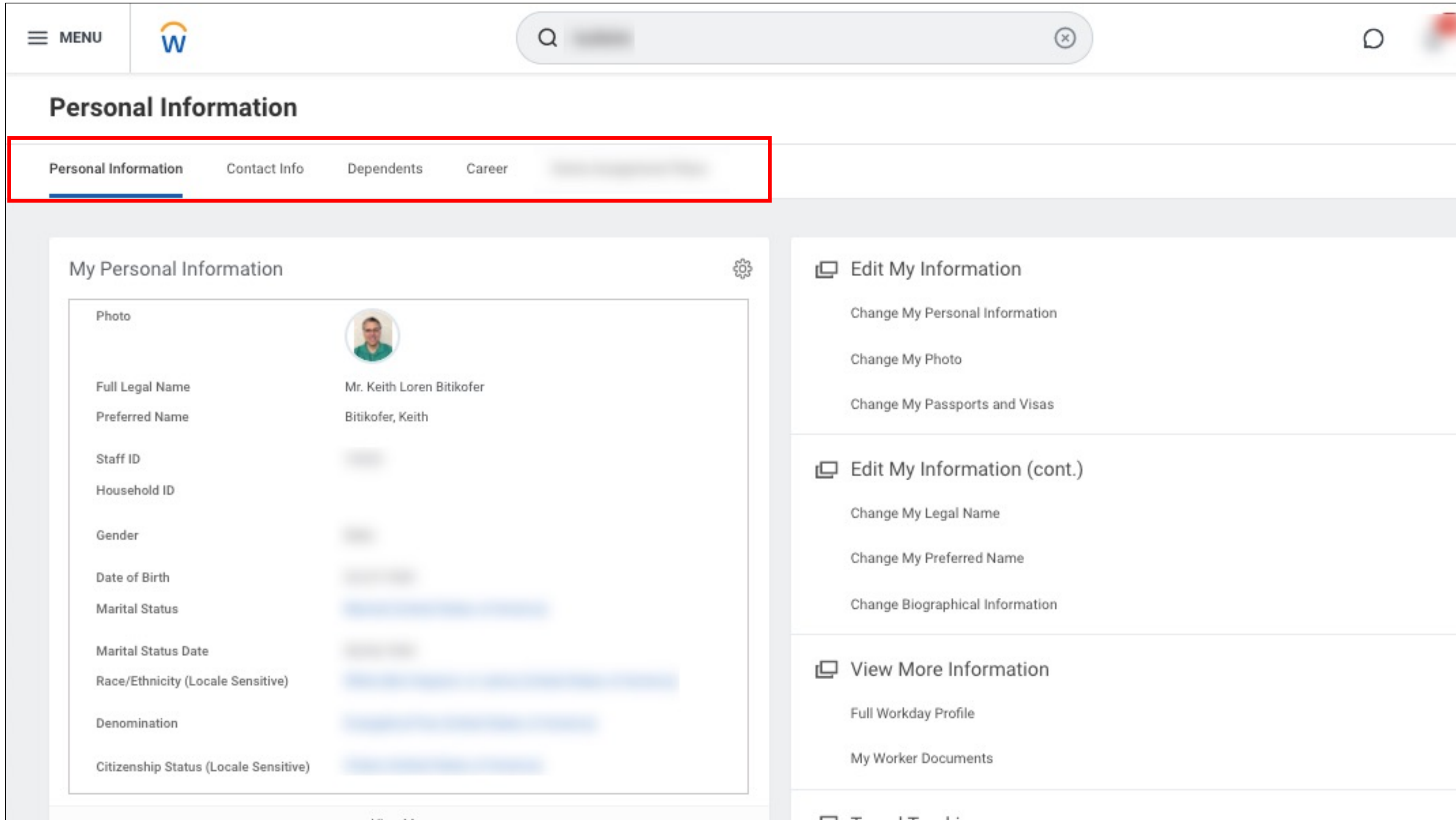
# Workday Dashboards

Default Personal Information Worklet – Very Limited!



The screenshot shows a Workday dashboard for 'Personal Information'. At the top, there is a navigation bar with a 'MENU' icon, the Workday logo, a search bar containing 'Personal Information', and notification icons for messages (44) and emails (324). Below the navigation bar is a blue header with the text 'Personal Information'. The main content area is divided into two columns: 'Change' and 'View'. The 'Change' column contains five buttons: 'Contact Information', 'Personal Information', 'Vaccination Status', 'Workplace Test Result', and 'Emergency Contacts', with a 'More (6)' link below. The 'View' column contains five buttons: 'About Me', 'Addresses', 'Email Addresses', 'Address Changes', and 'Name', with a 'More (2)' link below. The Workday logo is visible at the bottom center of the page.

# Content- Worker Personal Info Dashboard



The screenshot shows a web interface for a worker's personal information dashboard. At the top left is a 'MENU' icon. To its right is a logo with a 'W' inside a circle. Further right is a search bar with a magnifying glass icon and a close button. Below this is a navigation bar with the title 'Personal Information' and four tabs: 'Personal Information', 'Contact Info', 'Dependents', and 'Career'. The 'Personal Information' tab is selected and highlighted with a blue underline. Below the navigation bar is a main content area. On the left, there is a section titled 'My Personal Information' with a gear icon. It contains a list of fields: Photo (with a profile picture), Full Legal Name (Mr. Keith Loren Bitikofer), Preferred Name (Bitikofer, Keith), Staff ID, Household ID, Gender, Date of Birth, Marital Status, Marital Status Date, Race/Ethnicity (Locale Sensitive), Denomination, and Citizenship Status (Locale Sensitive). On the right, there are three sections: 'Edit My Information' with options to change personal information, photo, and passports/visas; 'Edit My Information (cont.)' with options to change legal name, preferred name, and biographical information; and 'View More Information' with options for a full workday profile and worker documents.


# Content- Worker Personal Info Dashboard

Navigation: MENU, W, Search, Notification

## Personal Information

Personal Information | Contact Info | Dependents | Career

### My Personal Information

Photo	
Full Legal Name	Mr. Keith Loren Bitikofer
Preferred Name	Bitikofer, Keith
Staff ID	[Redacted]
Household ID	[Redacted]
Gender	[Redacted]
Date of Birth	[Redacted]
Marital Status	[Redacted]
Marital Status Date	[Redacted]
Race/Ethnicity (Locale Sensitive)	[Redacted]
Denomination	[Redacted]
Citizenship Status (Locale Sensitive)	[Redacted]

### Edit My Information

- Change My Personal Information
- Change My Photo
- Change My Passports and Visas




### Edit My Information (cont.)

- Change My Legal Name
- Change My Preferred Name
- Change Biographical Information

### View More Information

- Full Workday Profile
- My Worker Documents


# Content- Worker Personal Info Dashboard

MENU    

## Personal Information

[Personal Information](#) [Contact Info](#) [Dependents](#) [Career](#)

### My Personal Information

Photo	
Full Legal Name	Mr. Keith Loren Bitikofer
Preferred Name	Bitikofer, Keith
Staff ID	
Household ID	
Gender	
Date of Birth	
Marital Status	
Marital Status Date	
Race/Ethnicity (Locale Sensitive)	
Denomination	
Citizenship Status (Locale Sensitive)	

### Edit My Information

- Change My Personal Information
- Change My Photo
- Change My Passports and Visas

### Edit My Information (cont.)

- Change My Legal Name
- Change My Preferred Name
- Change Biographical Information

### View More Information

- Full Workday Profile
- My Worker Documents

# Content- Worker Personal Info Dashboard

☰ MENU
W

C
✕

## Personal Information ⚙️

Personal Information
Contact Info
Dependents
Career

### My Contact Info ⚙️

Primary Home Email Address	keith_t
Primary Work Email Address	keith_t
All Home Phone Numbers	+1
All Work Phone Numbers	+1
All Mobile Phone Numbers	+1
All Home Addresses	11324 Orland United
All Work Addresses	Florida Tallah United

[View More ...](#)

### Edit My Information

- [Change My Home Contact Information](#) >
- [Change My Work Contact Information](#) >
- [Change My Emergency Contacts](#) >
- [Change My Social Networks](#) >

### My Emergency Contacts ⚙️

Emergency Contact Priority	Name	Relationship	Preferred Language

[View More ...](#)

### Need Help? - Contact Information

- [Change My Home Contact Information](#)
- [Change My Work Contact Information](#)
- [Change My Emergency Contacts](#)
- [Change My Social Networks](#)

# Content- Worker Personal Info Dashboard

☰ MENU
W

C
✕

## Personal Information ⚙️

Personal Information
Contact Info
Dependents
Career

### My Contact Info ⚙️

Primary Home Email Address	keith_t
Primary Work Email Address	keith_t
All Home Phone Numbers	+1
All Work Phone Numbers	+1
All Mobile Phone Numbers	+1
All Home Addresses	11324 Orland United
All Work Addresses	Florida Tallah United

View More ...

### Edit My Information

- Change My Home Contact Information >
- Change My Work Contact Information >
- Change My Emergency Contacts >
- Change My Social Networks >

### My Emergency Contacts ⚙️

Emergency Contact Priority	Name	Relationship	Preferred Language

View More ...

### Need Help? - Contact Information

- 🏠
Change Your Contact Information
- 🏢
Change Your Contact Information
- 👤
Change Your Contact Information

# Components of a Dashboard

Tabs ->

The screenshot shows a web dashboard for Human Resources. At the top left is a 'MENU' icon. A search bar is located at the top center. On the top right, there are notification icons for chat, a bell with '198', an envelope with '1', and a user profile. Below the header is a 'Human Resources' section with a sub-header. A horizontal tab bar contains five tabs: 'Staff Changes' (highlighted with a red box), 'Reports', 'Home Assignment Plans', 'Data Audits', and 'Global Shared Service (GSS)'. The main content area is divided into two columns. The left column is titled 'Position Management Tutorials' and contains four items: 'Create or Edit a Job Requisition' with a 'Job Requisition Tutorial' link, 'Create Position' with a 'Create Position Tutorial' link, 'Edit Positions & Edit Position Restrictions' with an 'Edit Position & Edit Position Restrictions Tutorial' link, and 'Assignment Management Tutorials' with five items: 'Start Job Change' (with 'Start Job Change Q&A' link), 'Add Job' (with 'Add Job Tutorial' link), 'End Job' (with 'End Job Tutorial' link), and 'Switch Primary to End Job'. The right column is titled 'Position Management Tasks' and contains three sections: 'Position Management Tasks' with four items (Create Job Requisition, Create Position, Edit Position Restrictions, Edit Position), 'Assignment Management Tasks' with three items (Start Job Change, Add Job, End Job), and 'Personnel Management Tasks' with four items (Edit Pre-Hire Profile, Place Worker on Leave, Submit Trip Itinerary for Worker, More (2)). At the bottom right of the right column is an 'Other Links' section. A red box highlights the entire right column. A red 'W' icon is in the bottom right corner.

Bulletin ->

Menu ->

Or  
Reports

# Worker Personal Info Dashboard

**Personal Information**

Personal Information | Contact Info | Dependents | Career

### My Personal Information

Photo	
Full Legal Name	Mr. Keith Loren Bitikofer
Preferred Name	Bitikofer, Keith
Staff ID	
Household ID	
Gender	
Date of Birth	
Marital Status	
Marital Status Date	
Race/Ethnicity (Locale Sensitive)	
Denomination	
Citizenship Status (Locale Sensitive)	

[View More ...](#)

### Need Help? - Personal Information

- Changing My Passports and Visas**  
You can add, change or edit passport or visa information in Workday.  
[Changing My Passports and Visas](#)
- Changing My Photo**  
Using a profile photo in Workday allows other staff to be able to identify you. For more detailed instruc...  
[Changing My Photo](#)

### My Passports

Passports				
Issued by Country	Passport Type	Passport Number	Issued Date	Expiration Date
No items available.				

[View More ...](#)

**Edit My Information**

- [Change My Personal Information](#)
- [Change My Photo](#)
- [Change My Passports and Visas](#)

**Edit My Information (cont.)**

- [Change My Legal Name](#)
- [Change My Preferred Name](#)
- [Change Biographical Information](#)

**View More Information**

- [Full Workday Profile](#)
- [My Worker Documents](#)

**Travel Tracking**

- [Submit Trip Itinerary Form](#)



# Example 'Content' type Dashboards

▶ Worker Personal Information

▶ Worker Benefits

▶ Departmental Dashboards

▶ Intranet type Dashboards

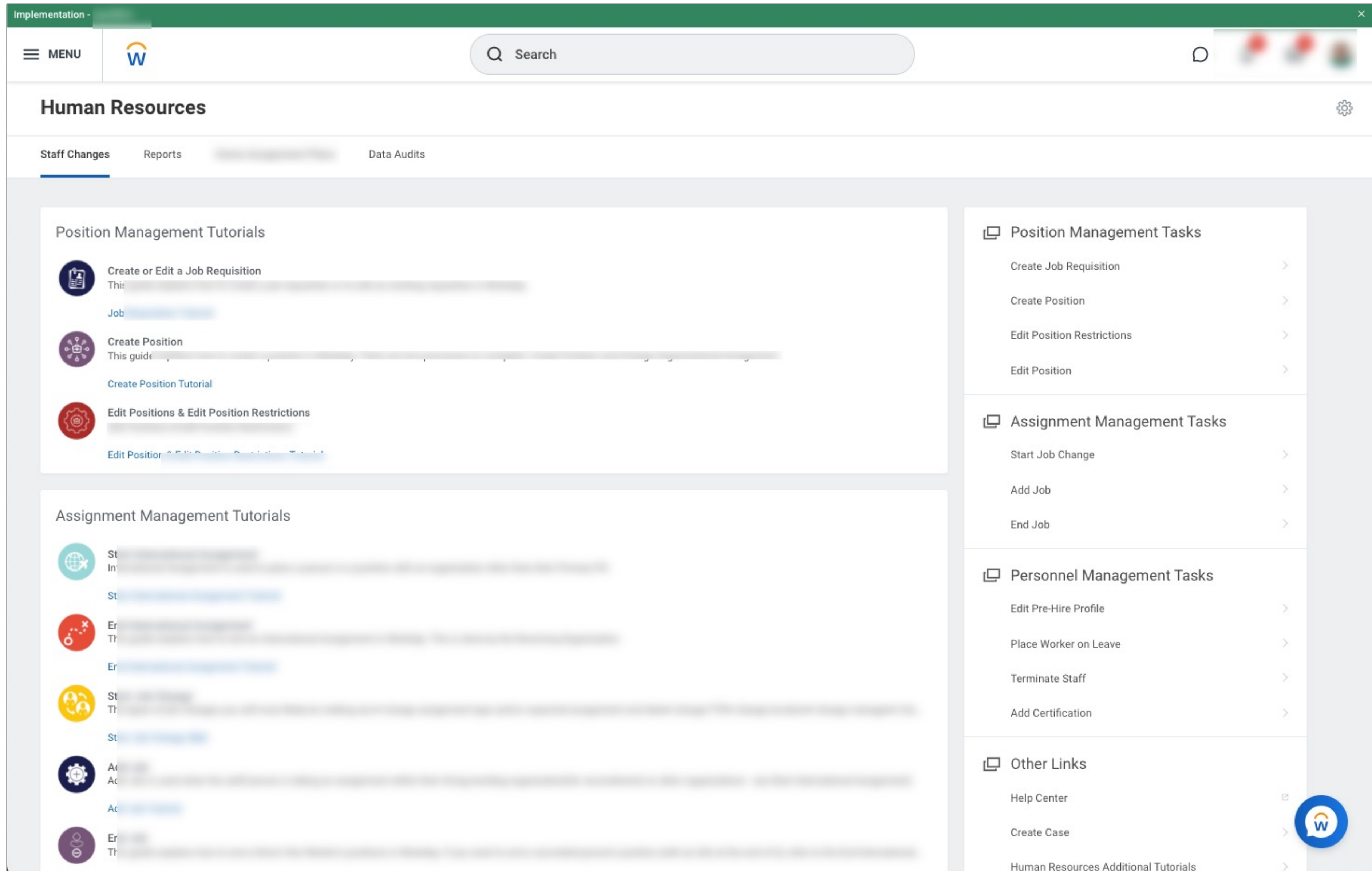


# Content: Worker Benefits Dashboard

Make  
CONTENT  
easy to find  
and use!

The screenshot shows a web application interface for a worker benefits dashboard. At the top, there is a navigation bar with a 'MENU' icon, a logo, and a search bar. Below this is a breadcrumb trail for 'Benefits' with a settings gear icon. The main content area is divided into two columns. The left column, titled 'Benefits', lists various benefit categories with icons and links: 'Getting Started' (hand icon), 'Medical, Dental' (first aid icon), 'Vision' (eye icon), 'Flexible Spending' (dollar sign icon), 'Health Savings' (pill icon), 'Life and Accidents' (person icon), 'Emergency' (ambulance icon), and 'Workers' Compensation' (worker icon). The right column contains four sections: 'Quick Links' with links for COVID-19 Information, Benefits Guides and Premiums, and Open Enrollment Information; 'View and Change Benefits' with links for View My Current Benefits, Change My Benefits, and My Dependents; 'Additional Perks and Services' with links for Staff Discount Programs and Senior Benefits and Retirement; and 'External Links' with links for Vision, Bank of, and Financial Group. A small circular logo is visible in the bottom right corner of the dashboard.

# Content: Departmental Dashboards



The screenshot displays the 'Human Resources' dashboard within a web application. At the top, there is a navigation bar with a 'MENU' icon, a search bar, and a user profile icon. Below the navigation bar, the main content area is titled 'Human Resources' and includes sub-sections for 'Staff Changes', 'Reports', and 'Data Audits'. The dashboard is organized into several key areas:

- Position Management Tutorials:** A list of guides including 'Create or Edit a Job Requisition', 'Create Position', and 'Edit Positions & Edit Position Restrictions'.
- Assignment Management Tutorials:** A list of guides related to staff assignments and management.
- Position Management Tasks:** A list of actionable tasks such as 'Create Job Requisition', 'Create Position', 'Edit Position Restrictions', and 'Edit Position'.
- Assignment Management Tasks:** A list of tasks including 'Start Job Change', 'Add Job', and 'End Job'.
- Personnel Management Tasks:** A list of tasks such as 'Edit Pre-Hire Profile', 'Place Worker on Leave', 'Terminate Staff', and 'Add Certification'.
- Other Links:** A section containing links to the 'Help Center', 'Create Case', and 'Human Resources Additional Tutorials'.

The interface is clean and professional, with a clear hierarchy of information and easy-to-use navigation elements.

# Content: Departmental Dashboards

Implementation x

☰ MENU
⌵ ⌵ ⌵

## Human Resources ⚙️

Staff Changes
Reports
Data Audits

### Company Information Reports ⚙️

Report Task	Brief Description
<a href="#">Company - [blurred]</a>	[blurred]
<a href="#">Company - General Info</a>	[blurred]
<a href="#">Company Contacts by contact type</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]

[View More ...](#)

### Contingent Worker Reports ⚙️

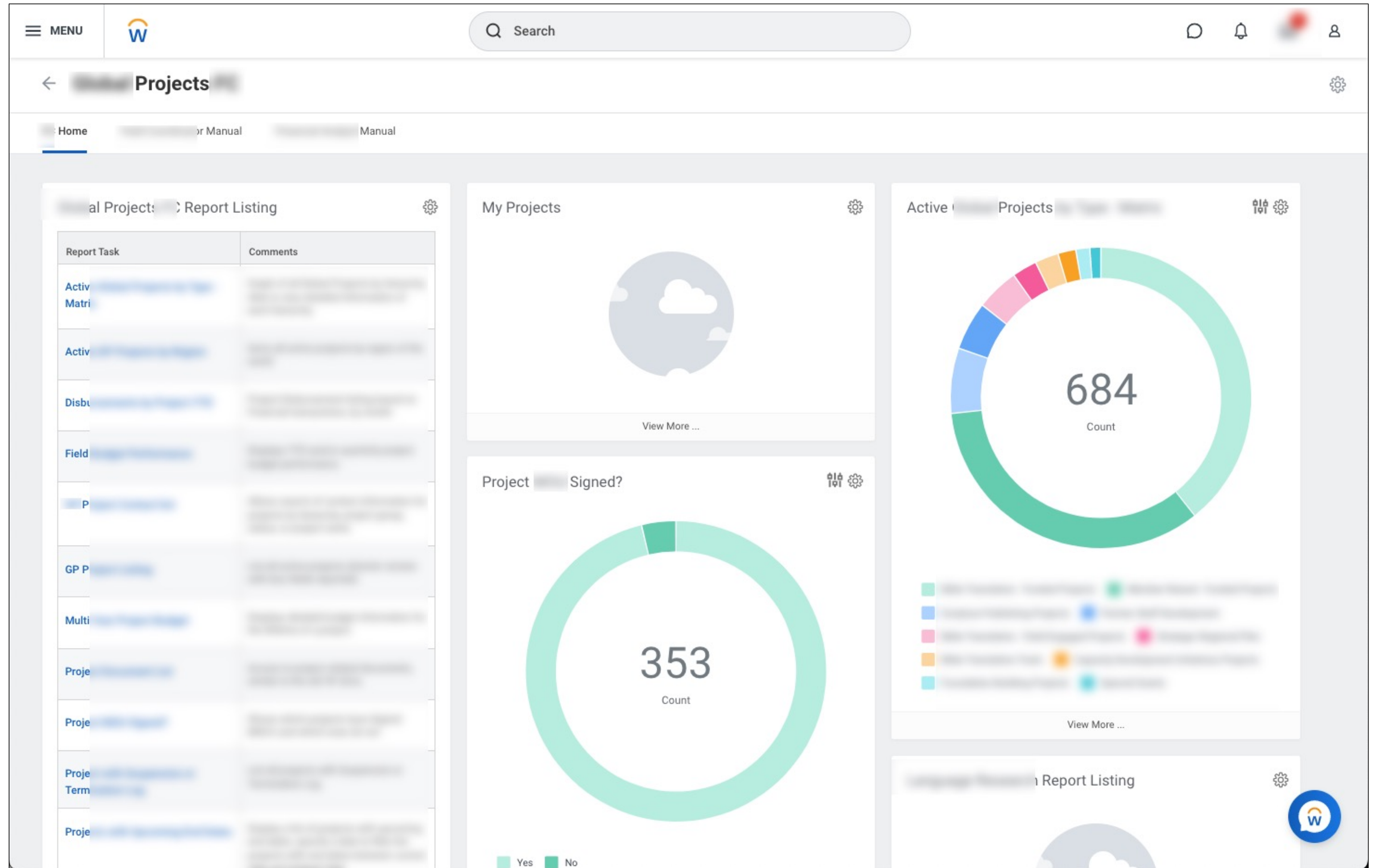
Report Task	Brief Description
<a href="#">All Contingent Workers (Active or Inactive)</a>	[blurred]
<a href="#">Contingent Workers by Company</a>	[blurred]

[View More ...](#)

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System Status: Your Implementation tenant will be unavailable for a maximum of 12 hours during the next Weekly Service Update: starting on Friday, April 7, 2023 at 6:00 PM Pacific Time (Los Angeles) (GMT-7) until Saturday, April 8, 2023 at 6:00 AM

# Content: Departmental Dashboards




# Report of Reports

Implementation


MENU  Search

**Human Resources**

Staff Changes **Reports** Data Audits

Company Information Reports 

Report Task	Brief Description
<a href="#">Company - [blurred]</a>	[blurred]
<a href="#">Company - General Info</a>	[blurred]
<a href="#">Company Contacts by contact type</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]

Contingent Worker Reports 

Report Task	Brief Description
<a href="#">All Contingent Workers (Active or Inactive)</a>	[blurred]
<a href="#">Contingent Workers by Company</a>	[blurred]

[View More ...](#)

Custom Report that list reports, filtered by a Report Tag

# Content: Intranet Type Dashboards

Make Workday the FIRST place workers go for information!

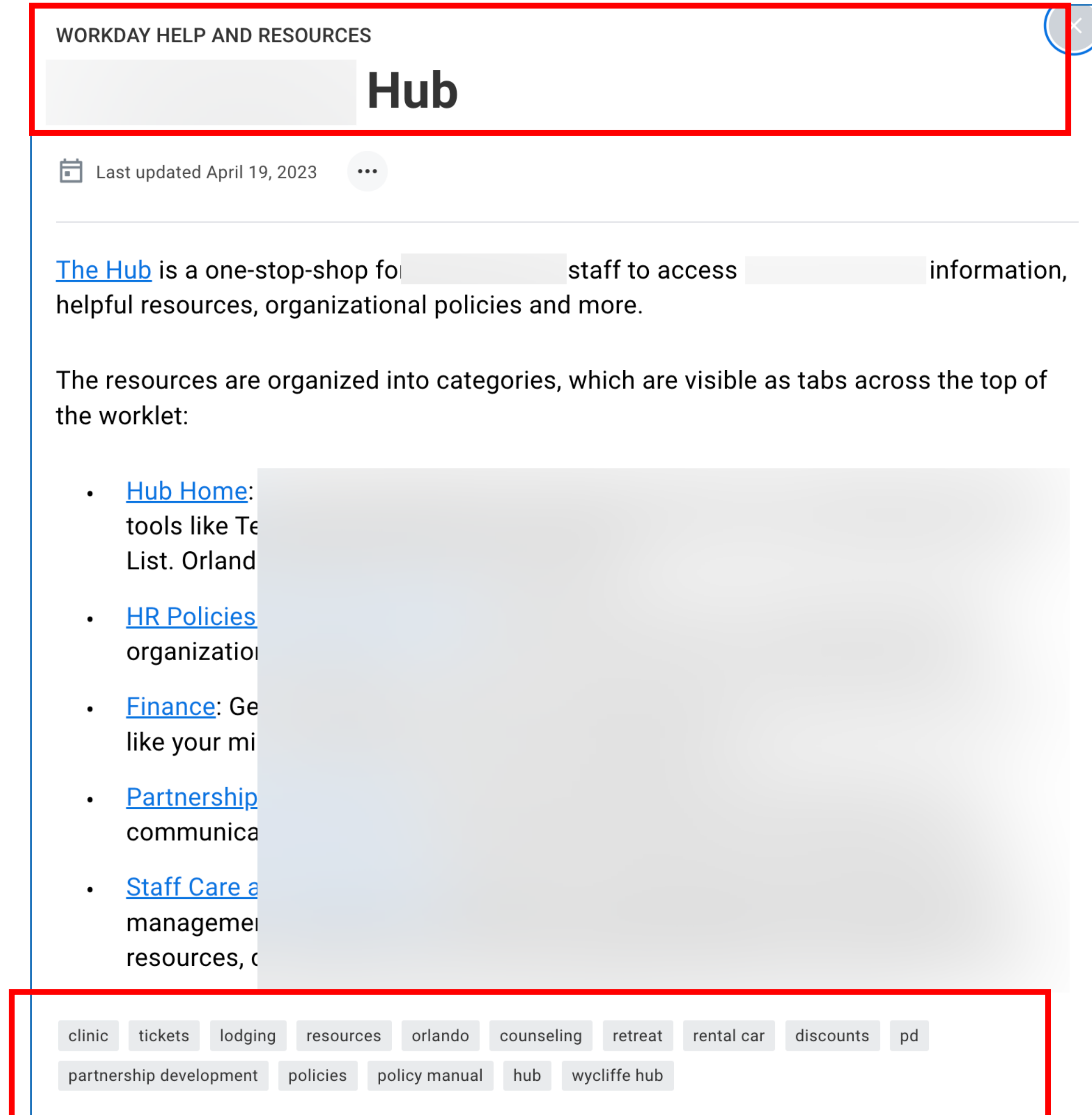
The screenshot shows a Workday USA Hub intranet dashboard. At the top, there is a green header with a search bar and a navigation menu. The main content area includes a 'Welcome! Start here.' message, a navigation bar with 'Hub Home' highlighted in a red box, and several content widgets: 'Communication Archives and Resources', 'Quick Links', 'Directories', 'Calendars', and 'Tech Support'.

# Content: Intranet Type Dashboards

Make Workday the FIRST place workers go for information!

# Helping People find the Dashboard

Use Workday Assistant and Workday Help Articles to direct people to your Dashboard



WORKDAY HELP AND RESOURCES

## Hub

Last updated April 19, 2023

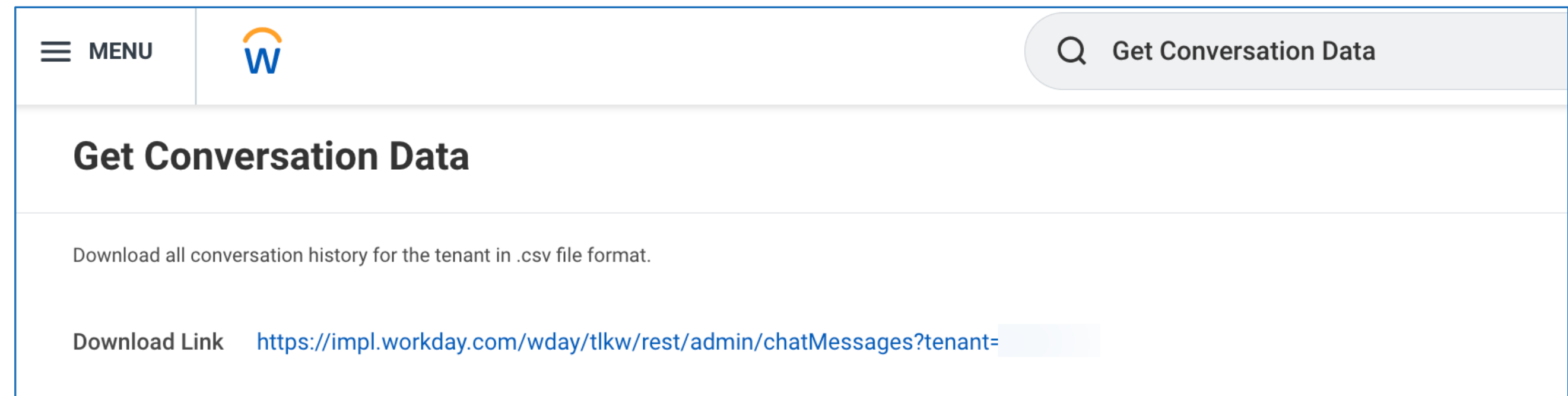
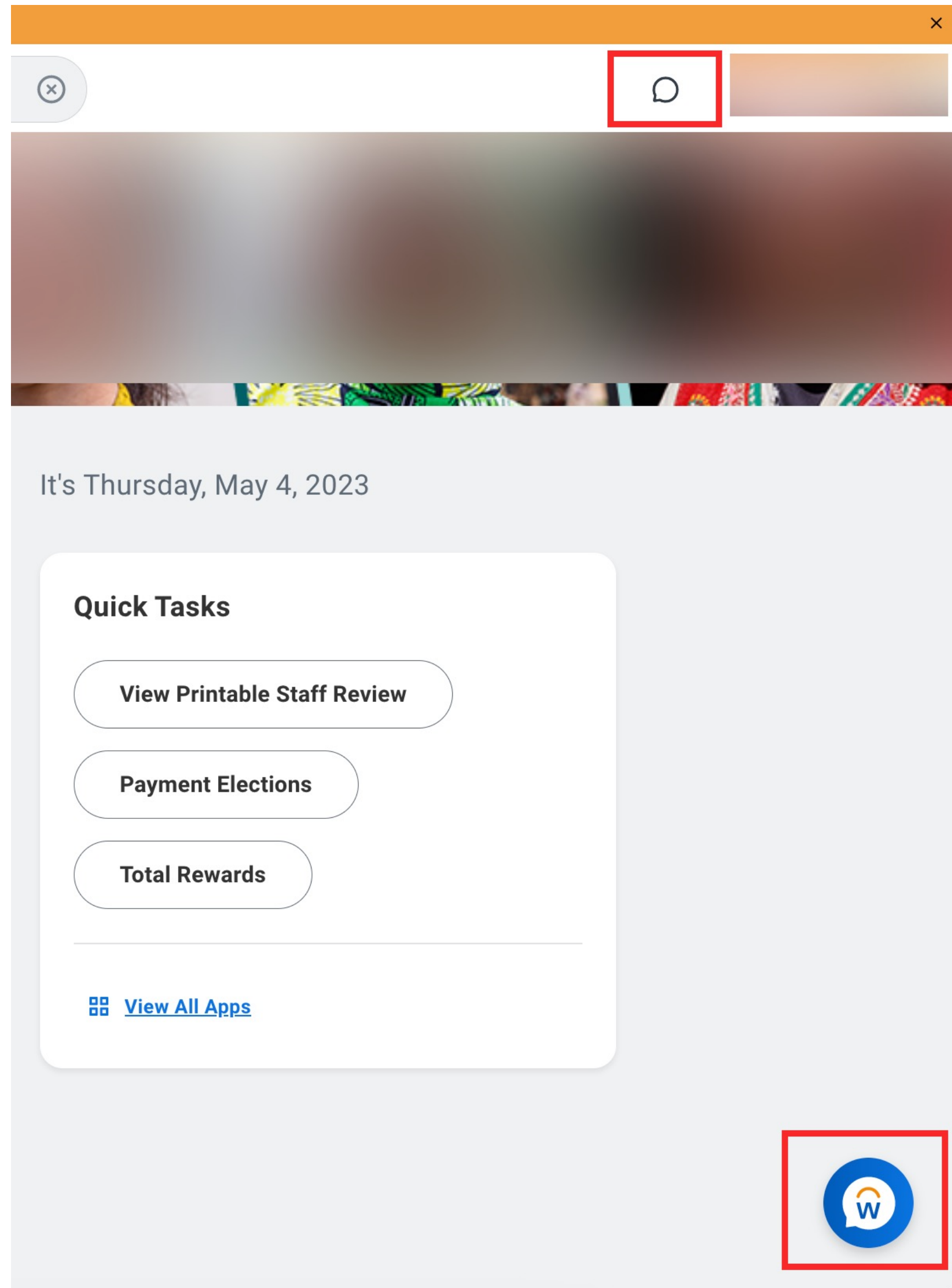
[The Hub](#) is a one-stop-shop for [redacted] staff to access [redacted] information, helpful resources, organizational policies and more.

The resources are organized into categories, which are visible as tabs across the top of the worklet:

- [Hub Home:](#) tools like Te [redacted] List. Orland
- [HR Policies](#) organization
- [Finance:](#) Ge like your mi
- [Partnership](#) communica
- [Staff Care a](#) managemen resources, c

clinic tickets lodging resources orlando counseling retreat rental car discounts pd  
partnership development policies policy manual hub wycliffe hub

# Helping People find the Dashboard



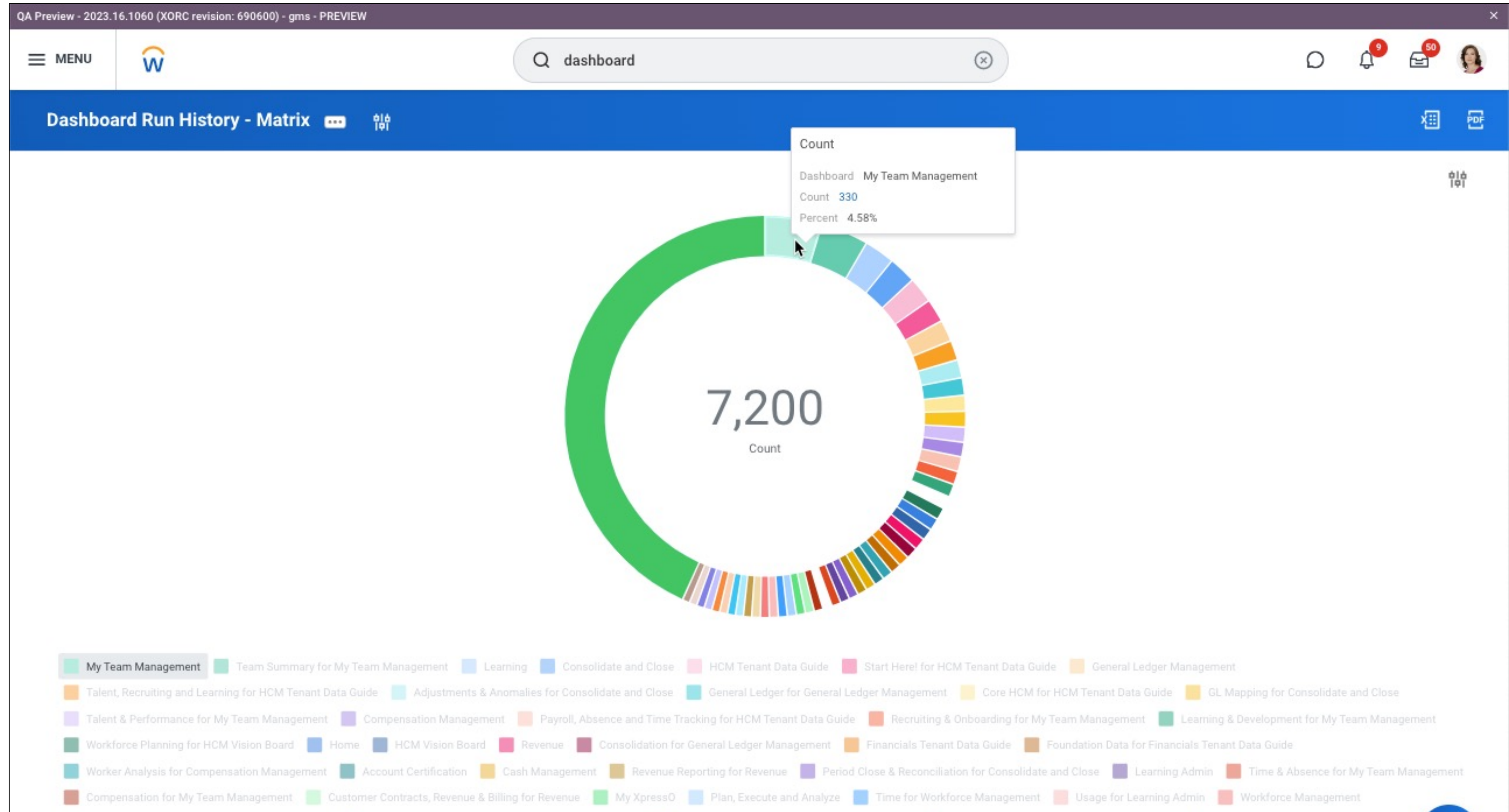
# Content: Dynamic Bulletins Rows

Create Conditional rules to show / hide items

The screenshot shows a web application interface with a green header bar labeled 'Implementation'. Below the header is a navigation bar with a 'MENU' icon, a 'W' logo, and a search bar. The main content area is titled 'USA Hub' and features a 'Welcome! Start here.' message with a 'View More' link. Below this is a navigation bar with 'Hub Home', 'HR Policies and Administration', and 'Finance'. The main content area is titled 'Policy Handbook' and contains a list of items. Two items are highlighted with red boxes: 'Intro View' and 'Care View'. The 'Quick Links' section on the right contains a link to 'Policy Handbook'. The 'Calendars' section on the right contains links to 'Corporate Calendar', '2022 Payday and Holiday Calendar', and '2023 Payday and Holiday Calendar'. The 'HR Administrative Services' section on the right contains links to 'Per Acc', 'Per', 'Ver Sta', and 'Ver'. A 'W' logo is visible in the bottom right corner.


# Track Dashboard Usage - New

## Indexed Dashboard Run History



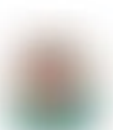


# Track Dashboard Usage - New

## Indexed Dashboard Run History

☰ MENU


🔍

🗨




### Dashboard Run History ⋮

📄 📄 PDF

3 items 📄 📄 📄 📄 📄 📄

Dashboard	Dashboard Name	Start Date and Time	Requested By
<a href="#">Personal Information</a>	Personal Information	04/17/2023 03:44:17.244 PM	<a href="#">Bitikofer, Keitl</a>
<a href="#">Personal Information for Personal Information</a>	Personal Information for Personal Information	04/17/2023 03:44:17.875 PM	<a href="#">Bitikofer, Keitl</a>
<a href="#">Contact Info for Personal Information</a>	Contact Info for Personal Information	04/17/2023 03:44:22.537 PM	<a href="#">Bitikofer, Keitl</a>

### Edit Tenant Setup – Reporting and Analytics

▼ **Dashboard Run History**

Select if you want to start logging dashboard run history data

Enable Access to Dashboard Run History

OK
Cancel

# Components of a Dashboard

The screenshot shows a web dashboard for Human Resources. At the top, there is a navigation bar with a 'MENU' icon, a search bar, and notification icons. Below this is a 'Human Resources' header with a settings gear. A horizontal tab bar contains 'Staff Changes', 'Reports', 'Home Assignment Plans', 'Data Audits', and 'Global Shared Service (GSS)'. The main content area is divided into two columns. The left column has two sections: 'Position Management Tutorials' and 'Assignment Management Tutorials', each with several items and icons. The right column has three sections: 'Position Management Tasks', 'Assignment Management Tasks', and 'Personnel Management Tasks', each with a list of actions and icons. A 'W' logo is in the bottom right corner.

Tabs ->

Bulletin ->

Or  
Reports

Menu ->

# How to do this? Build Order...

- ▶ **Talk with your users!  
What would be helpful?**
- ▶ **Create a new Dashboard (just the basics).  
Then edit it later.**
- ▶ **Create Bulletin(s)**
- ▶ **Create Reports or 'Report of Reports'**
- ▶ **Add Bulletins and Reports to Dashboard**

*The GOAL is to  
make life easier  
for your USERS!*



# How we help:

## ABOUT US

Human Capital Management

Financial Management

Leadership- Project Mgt,  
Change Mgt

Payroll, Absence, Time Tracking

Analytics and Reporting

Coaching

Talent Management

Data Management

Integrations

**Our team of highly experienced client-side Workday consultants is available to help you at any stage of your Workday life-cycle!**



Advisory  
Partner

# Questions?

## Next Steps:

To sign up for our newsletter:



#workdaytips

[www.linkedin.com/in/keith-bitikofer/](https://www.linkedin.com/in/keith-bitikofer/)  
[kbitikofer@enterprisemarketdesk.com](mailto:kbitikofer@enterprisemarketdesk.com)

To talk with our team:



# How to do this? Build Order...

- ▶ **Talk with your users!  
What would be helpful?**
- ▶ **Create a new Dashboard (just the basics).  
Then edit it later.**
- ▶ **Create Bulletin(s)**
- ▶ **Create Reports or 'Report of Reports'**
- ▶ **Add Bulletins and Reports to Dashboard**

*The GOAL is to  
make life easier  
for your USERS!*

# Components of a Dashboard

The screenshot shows a web dashboard for Human Resources. At the top left is a 'MENU' icon. A search bar is located at the top center. On the top right, there are notification icons for chat, a bell with '198', an envelope with '1', and a user profile. Below the header is a 'Human Resources' section with a sub-menu containing 'Staff Changes', 'Reports', 'Home Assignment Plans', 'Data Audits', and 'Global Shared Service (GSS)'. The main content area is divided into two columns of tutorials and a right-hand sidebar. The left column has 'Position Management Tutorials' and 'Assignment Management Tutorials'. The right sidebar has 'Position Management Tasks', 'Assignment Management Tasks', 'Personnel Management Tasks', and 'Other Links'. A blue circular icon with a 'W' is in the bottom right corner.

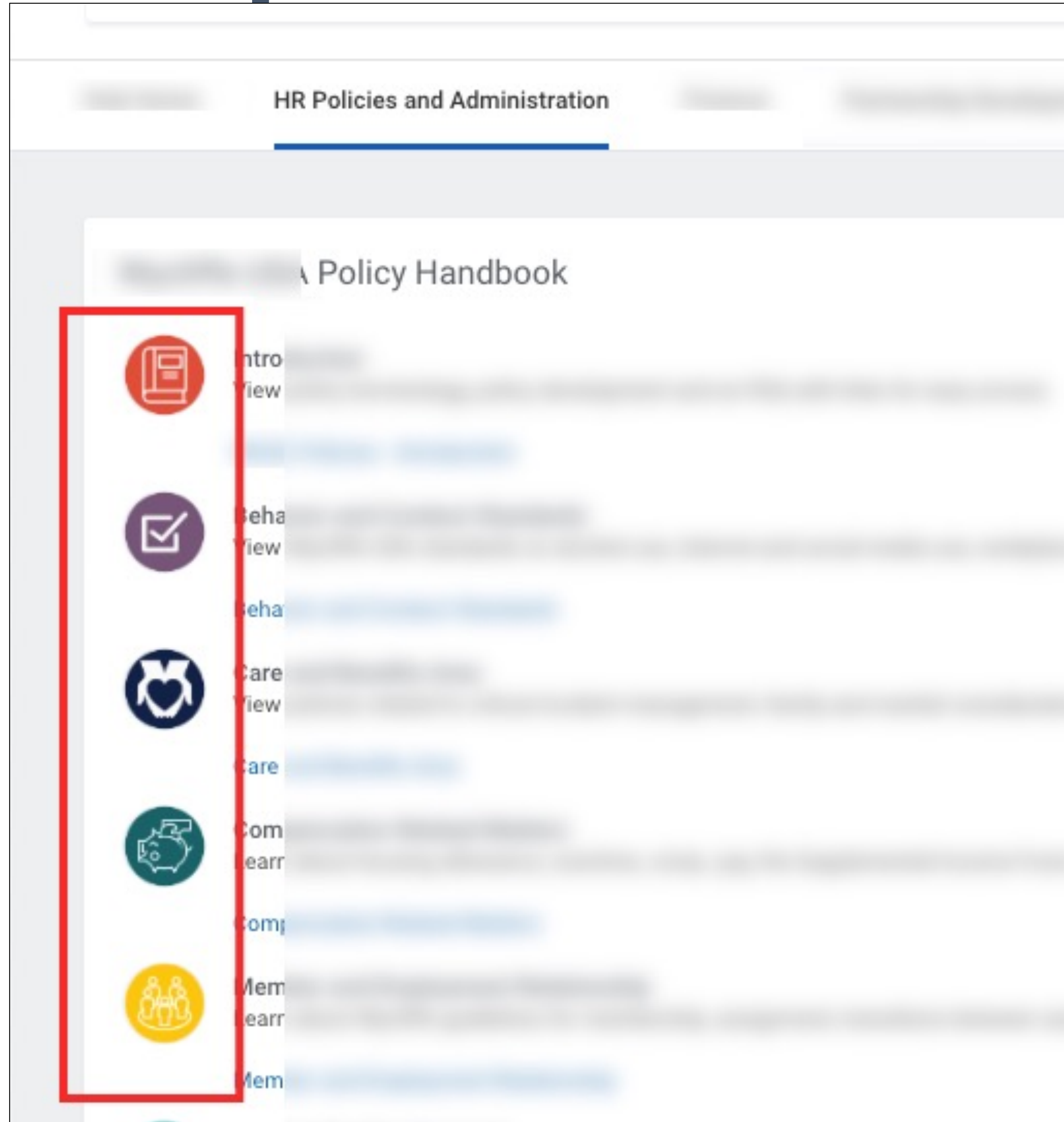
Tabs ->

Bulletin ->

Or  
Reports

Menu ->

# Components of a Dashboard



Icons ->

# Where do I get "Icons"?

The screenshot shows the Canva website interface. At the top, there is a navigation bar with the Canva logo, menu items like 'Design spotlight', 'Business', 'Education', 'Plans and pricing', and 'Learn', a search bar containing 'web and seo', and a 'Create a design' button. Below the navigation bar, the breadcrumb trail reads 'Home > Icons > Web And Seo'. The main heading 'Web & SEO Icons' is highlighted with a red box. Below the heading, a description states: 'Choose from our collection of web and SEO icons to create engaging layouts for your marketing content needs.' A red box highlights the text '1,134,385 icons'. The main content area displays a grid of various icons related to web and SEO, including a 404 error page, a green shield with a checkmark, a JSON file, a magnifying glass over 'www', a server rack, an email icon, an API icon, a website layout, a laptop with an envelope, a globe with a location pin, and a smartphone. A sidebar on the left contains navigation options: 'Back to Home', 'All templates', 'Photos', 'Icons' (highlighted), 'Your Content', 'Brand Templates', and 'Starred'. At the bottom left, there are buttons for 'Invite members' and 'Trash'.

# Dashboard Components – Setup

MENU



maintain dashboard

## Maintain Dashboards



274 items



Dashboard

Sort Ascending  
 Sort Descending

Filter Condition \*

is

Value \*

Filter

Dashboard	Type	Dashboard Tabs	Run	Edit	Delete
Workday Delivered	Workday Delivered	No	Run	Edit	
Custom	Custom	Yes	Run	Edit	Delete
Workday Delivered	Workday Delivered	Yes		Edit	
Workday Delivered	Workday Delivered	No		Edit	
Workday Delivered	Workday Delivered	Yes		Edit	
Workday Delivered	Workday Delivered	No		Edit	
Academic Tenure Dashboard	Workday Delivered	Yes		Edit	
Account Certification	Workday Delivered	Yes		Edit	

# Dashboard Components – Setup

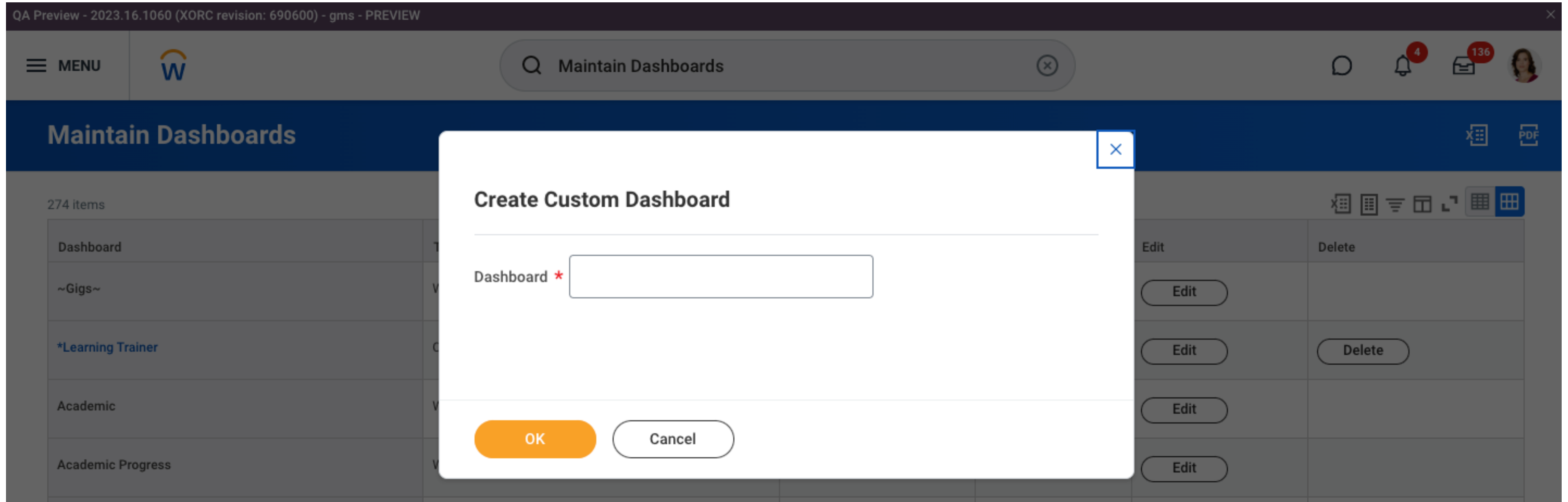
274 items

Dashboard	Type	Dashboard Tabs	Run	Edit	Delete
<a href="#">External Recruiting</a>	Custom	Yes	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Feature Dashboard</a>	Custom	No	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Finances	Workday Delivered	Yes		<a href="#">Edit</a>	
Finances for Third Party	Workday Delivered	Yes		<a href="#">Edit</a>	
<a href="#">Financial Analysis</a>	Custom	No	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Financial Executive Scorecard	Workday Delivered	Yes		<a href="#">Edit</a>	
<a href="#">Financial History Analytics</a>	Custom	Yes	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Financial Management Overview	Workday Delivered	No	<a href="#">Run</a>	<a href="#">Edit</a>	
<a href="#">Financial Reporting (Intelligent Data Core)</a>	Custom	Yes	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Financial Results</a>	Custom	No	<a href="#">Run</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
Financials	Workday Delivered	Yes		<a href="#">Edit</a>	

Items per page All ▼ 1-274 of 274 items

[Create Custom Dashboard](#)

# Dashboard Components – Setup



Do this before creating reports.

Then come back to do the rest of the setup AFTER you create the reports / bulletins.

# Dashboard Components – Setup



## Create Custom Dashboard

Dashboard Name \*

### Edit custom dashboard settings

Domains \*

Description

Dashboard Icon \*

Dashboard Tabs

Max allowed tabs is 6.

Max Worklets Allowed \*

# Dashboard Components – Setup

QA Preview - 2023.16.1060 (XORC revision: 690600) - gms - PREVIEW

MENU

**Create Custom Dashboard** test Personal Information

Dashboard Name test Personal Information

## Edit custom dashboard settings

Domains Self-Service: Personal Information

Description

Dashboard Icon Personal Info

Dashboard Tabs Yes

Max allowed tabs is 6.

Max Worklets Allowed 6

revision: 690600) - gms - PREVIEW

**Dashboard** test Personal Information

- Custom Landing Page ... >
- Audits >
- Dashboard** >
- Favorite >
- Integration IDs >
- Security >
- Translation >

Personal Information




**board settings**

Service: Personal Information





Personal Info

# Bulletin Components Setup

### Position Management Tutorials

-  **Create or Edit a Job Requisition**  
This guide explains how to create a job requisition or to edit  
[Job Requisition Tutorial](#)
-  **Create Position**  
This guide explains how to create a position in Workday. T  
[Create Position Tutorial](#)
-  **Edit Positions & Edit Position Restrictions**  
Edit Positions & Edit Position Restrictions  
[Edit Position & Edit Position Restrictions Tutorial](#)

Search:

-  **Create Bulletin Worklet**  
Task
-  **Delete Bulletin Worklet**  
Task
-  **Edit Bulletin Worklet**  
Task
-  **View Bulletin Worklet**  
Report

# Bulletin Setup

'Create Bulletin' - just search 'Bulletin'

MENU Search

### View Bulletin Worklet

Bulletin Worklet

Name: Audit Reports

Label: (empty)

Landing Pages / Landing Page Groups for Bulletin Worklet: **Human Resources**

4 items

Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message	Video	Action / Custom Report / External Link
		<input type="radio"/> Message From <input checked="" type="radio"/> Message Title: Worldwide Staff > Audit	<input type="radio"/> Show Current Photo <input checked="" type="radio"/> Upload Custom Image: reports.png	Run the audit report provided.	Title Description Preview Image Video URL	<input type="radio"/> Action <input checked="" type="radio"/> Custom Report: - Worldwide Staff > Audit <input type="radio"/> External Link
		<input type="radio"/> Message From <input checked="" type="radio"/> Message Title: S Audit > FTE Audit	<input type="radio"/> Show Current Photo <input checked="" type="radio"/> Upload Custom Image: reports.png		Title Description Preview Image	<input type="radio"/> Action <input checked="" type="radio"/> Custom Report: > FTE Audit <input type="radio"/> External Link

# Bulletin Setup

Bulletin Worklet

Name

Label

Landing Pages / Landing Page Groups for Bulletin Worklet

3 items

	Order	Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 2 <input type="checkbox"/> 2 <input type="checkbox"/> 2 <input type="checkbox"/> 2 <input type="checkbox"/> 2	MM/DD/YYYY	<input type="radio"/> Message From <input checked="" type="radio"/> Message Title <input type="radio"/> None of the above	<input type="radio"/> Show Current Photo <input checked="" type="radio"/> Upload Custom Image <input type="radio"/> None of the above	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> S <input type="checkbox"/> 2 <input type="checkbox"/> S <input type="checkbox"/> B <input type="checkbox"/> 2 <input type="checkbox"/> S		<input type="radio"/> Message From <input checked="" type="radio"/> Message Title	<input type="radio"/> Show Current Photo <input checked="" type="radio"/> Upload Custom Image × Activities.png	Corporate Discounts on:

Row 1 ->

Row 2 ->

# Report of Reports - Setup

Custom Report that list reports, filtered by a Report Tag

**Human Resources**

Staff Changes | **Reports** | Data Audits

### Company Information Reports

Report Task	Brief Description
<a href="#">Company - Detailed Info for HR / Finance</a>	Shows Listing of Organizations / Companies in Workday.
<a href="#">Company - General Info</a>	
<a href="#">Company Contacts by contact type</a>	
<a href="#">...</a>	
<a href="#">...</a>	
<a href="#">...</a>	
<a href="#">...</a>	

[View More ...](#)

### Contingent Worker Reports

Report Task	Brief Description
<a href="#">All Contingent Workers (Active or Inactive)</a>	
<a href="#">Contingent Workers by Company</a>	

[View More ...](#)

# Report of Reports – Setup

Edit Custom Report Company Information Reports

Report Name \* Company Information Reports

Report Type Advanced

Data Source \* Custom Reports I Can Run

Data Source Type Standard

Primary Business Object Custom Report

Report Tags



Report Definition Usages 12

## > Additional Info

- Columns**
- Sort
- Filter
- Subfilter
- Prompts
- Output
- Share
- Advanced

2 items

	Order	*Business Object	Field	Column Heading Override	Format	Options
				<input type="text"/>		<input type="text"/>
				<input type="text"/>		<input type="text"/>

Group Column Headings 0 items

OK

Cancel

# Report of Reports – Setup

## Edit Custom Report Company Information Reports

Report Name \*

Report Type Advanced

Data Source \*

Data Source Type Standard

Primary Business Object Custom Report

Report Tags

Report Definition Usages 12

### Additional Info

Columns Sort **Filter** Subfilter Prompts Output Share Advanced

### Filter on Instances

Filter conditions for filtering on instances 2 items

	Order	And/Or	(	*Field	*Operator	Comparison Type	Comparison Value
(+)	▼	And		× Report Tags	× any in the selection list	× Value specified in this filter	× Company / Organizational
(+)	▲	And		× Report Task	× is not empty		

OK Cancel

# Report of Reports – Setup

### Edit Custom Report

Company Information Reports

Report Name: Company Information Reports

Report Type: Advanced

Data Source: Custom Reports I Can Run

Data Source Type: Standard

Primary Business Object: Custom Report

Report Tags

Report Definition Usages: 12

> **Additional Info**

Columns | Sort | Filter | Subfilter | Prompts | **Output** | Share | Advanced

Specify output options for the report

**Output Type**

Output Type: Table

> **Worklet Options**

**Help Text**

Brief Description: This is a general listing of HR reports. In Workday a 'Company' is

More Info

OK Cancel



# Report of Reports

## Human Resources

Staff Changes   **Reports**   Data Audits

### Company Information Reports

Report Task	Brief Description
Company - <a href="#">[Link]</a>	[Blurred description]
Company - General Info	[Blurred description]
Company Contacts by contact type	[Blurred description]
<a href="#">[Link]</a>	[Blurred description]
<a href="#">[Link]</a>	[Blurred description]
<a href="#">[Link]</a>	[Blurred description]

### Contingent Worker Reports

Report Task	Brief Description
All Contingent Workers (Active or Inactive)	[Blurred description]
Contingent Workers by Company	[Blurred description]

# Report of Reports – Setup

> **Additional Info**

Columns   Sort   Filter   Subfilter   Prompts   **Output**   Share   Advanced

Specify output options for the report

**Output Type**

Output Type \*

**Worklet Options**

Enable As Worklet

Available on

Maximum Number of Rows \*

Maximize Report Options (empty)

\*  Display this Worklet when Maximized  
 Run a Different Report when Maximized

Refresh Data \*

Worklet Icon \*

Options

OK Cancel

# Go back to: Maintain Dashboard

QA Preview - 2023.16.1060 (XORC revision: 690600) - gms - PREVIEW

MENU



maintain dashboard



## Maintain Dashboards



274 items



Dashboard

↑ Sort Ascending

↓ Sort Descending

**Filter Condition \***

is

**Value \***

Filter

Dashboard	Type	Dashboard Tabs	Run	Edit	Delete
Workday Delivered	Workday Delivered	No	Run	Edit	
Custom	Custom	Yes	Run	Edit	Delete
Workday Delivered	Workday Delivered	Yes		Edit	
Workday Delivered	Workday Delivered	No		Edit	
Workday Delivered	Workday Delivered	Yes		Edit	
Workday Delivered	Workday Delivered	No		Edit	
Academic Tenure Dashboard	Workday Delivered	Yes		Edit	
Account Certification	Workday Delivered	Yes		Edit	

# Dashboard Components – Setup

QA Preview - 2023.16.1060 (XORC revision: 690600) - gms - PREVIEW

MENU

**Edit Dashboard** test Personal Information

Settings **Announcements** Content

1 item

Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message	Video	Task / Custom Report / External I
		<input type="radio"/> Message From <input checked="" type="radio"/> Message Title Welcome to the new Personal Information Dashboard!	<input type="radio"/> Show Current Photo <input type="radio"/> Upload Custom Image	<div style="border: 1px solid gray; padding: 5px;">             Welcome to the new Personal Information Dashboard           </div>	<input type="radio"/> Title <input type="radio"/> Description <input type="radio"/> Preview Image <input type="radio"/> Video URL	<input type="radio"/> Task <input type="radio"/> Custom Report <input type="radio"/> External Link

# Dashboard Components – Setup

QA Preview - 2023.16.1060 (XORC revision: 690600) - gms - PREVIEW

MENU Maintain Dashboards

## Configure Announcements

1 item

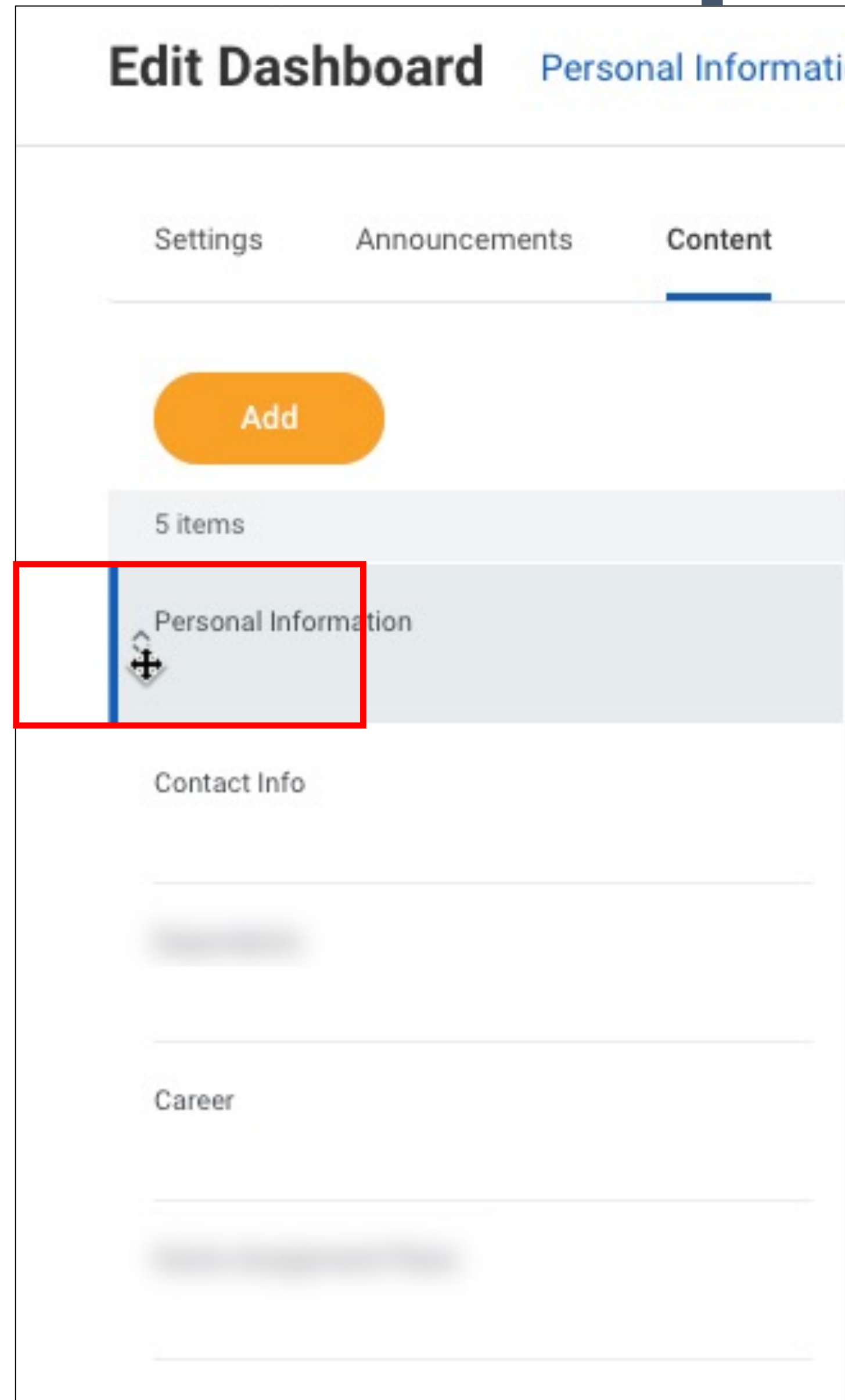
	Order	Rule	Expiration Date	Message From / Message Title	Show Current Photo / Upload Custom Image	Message	Video
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	MM/DD/YYYY <input type="text"/>	<input type="radio"/> Message From <input type="text"/> <input checked="" type="radio"/> Message Title <input type="text" value="Welcome to the new Personal In"/> <input type="radio"/> None of the above	<input type="radio"/> Show Current Photo <input type="radio"/> Upload Custom Image <input type="text"/> <input checked="" type="radio"/> None of the above	<input type="text" value="new Personal Information Dashboard"/> <input type="button" value="Format Text"/>	Title <input type="text"/> Description <input type="text"/> Preview Image <input type="text"/> Video URL <input type="text"/> Media Drop file here or

# Dashboard Components – Setup

The screenshot shows the 'Edit Dashboard' interface for 'Personal Information'. The 'Content' tab is selected and highlighted with a red box. An 'Add' button is also highlighted with a red box. Below the 'Add' button, a list of items is shown, with 'Contact Info' highlighted by a red box. The 'Edit' section includes a 'Tab Name' field set to 'Personal Information' and a 'Prompt Set (All)' dropdown. A 'Configurable By User' checkbox is present and unchecked. The 'Worklets' section shows a table with 4 items.

	Order	*Worklet	*Required for Groups	Required?	Worklet Size
(+) (-)	▼ ▼	× My Personal Information	× Contingent Worker As Self × Employee As Self	<input type="checkbox"/>	2x
(+) (-)	▲ ▼	× Need Help? - Personal Information	× All Users	<input type="checkbox"/>	1x
(+) (-)	▲ ▼	× My Reports	× Contingent	<input type="checkbox"/>	1x

# Dashboard Components – Setup



# Dashboard Components – Setup

The screenshot shows the 'Edit Dashboard' interface for 'Personal Information'. The 'Content' tab is selected. The 'Worklets' section is expanded, showing a table with 4 items. The 'My Personal Information' worklet is highlighted, and its 'Worklet Size' is set to '2x'. The 'Need Help? - Personal Information' worklet is also highlighted, and its 'Worklet Size' is set to '1x'.

**Edit**

Tab Name \* Personal Information Prompt Set (All)

Configurable By User

**Worklets**

Worklets 4 items

	Order	*Worklet	*Required for Groups	Required?	Worklet Size
(+)	▼	My Personal Information	Contingent Worker As Self Employee As Self	<input type="checkbox"/>	2x
(+)	▲	Need Help? - Personal Information	All Users	<input type="checkbox"/>	1x
(+)	▲	My Reports	Contingent	<input type="checkbox"/>	1x

# Report of Reports

## Human Resources

Staff Changes **Reports** Data Audits

### Company Information Reports

Report Task	Brief Description
Company - <a href="#">[blurred]</a>	[blurred]
Company - General Info	[blurred]
Company Contacts by contact type	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]
<a href="#">[blurred]</a>	[blurred]

### Contingent Worker Reports

Report Task	Brief Description
<a href="#">All Contingent Workers (Active or Inactive)</a>	[blurred]
<a href="#">Contingent Workers by Company</a>	[blurred]

# Dashboard Components – Setup

Settings
Announcements
Content

Add

5 items

Personal Information

Contact Info

Career

### Edit 🗑️

Tab Name \*  Prompt Set (All)

Configurable By User

> **Worklets**


⌵ **Menu**

Menu Sections 4 items

+	Order	*Section Label	+	Order	Item
+ -	▼ ▼	Edit My Information	+		
			+ -	▼ ▼	Task <input type="text" value="× Change My Personal Information"/> 🗑️
			+ -	▲ ▼	Task <input type="text" value="× Change My Photo"/> 🗑️
			+ -	▲ ▲	Task <input type="text" value="× Change My Passports and Visas"/> 🗑️

+ -	▲ ▼	Edit My Information (cont.)	+		
-----	-----	-----------------------------	---	--	--

Done



# Dashboard Components – Setup

Settings   Announcements   **Content**

**Add**

5 items

- Personal Information
- Contact Info
- Career

**Edit** 🗑️

Tab Name \*    Prompt Set (All)

Configurable By User

> **Worklets**

📄 **Menu**

Menu Sections 4 items

+	Order	*Section Label		Order	Item
+ -	▼ ▼	<input type="text" value="Edit My Information"/>	+		
			+ -	▼ ▼	Task <input type="text" value="× Change My Personal Information"/> <span>🗑️</span> <span>☰</span>
			+ -	▲ ▼	Task <input type="text" value="× Change My Photo"/> <span>🗑️</span> <span>☰</span>
			+ -	▲ ▲	Task <input type="text" value="× Change My Passports and Visas"/> <span>🗑️</span> <span>☰</span>
+ -	▲ ▼	<input type="text" value="Edit My Information (cont.)"/>	+		

**Done**

# Dashboard Components – Setup

Add 

Tab Name \*

Prompt Set (All)

(empty)



















Configurable By User




> Worklets

▾ Menu

Menu Sections 1 item

	Order	*Section Label		Order	Item
 	 	<input type="text" value="test task"/>			<input type="text" value="Tasks"/> 
			 	 	<input type="text" value="Create Custom Allowed Worklet Task"/> 
			 		<input type="text" value="Search"/> 
					Custom Report <input type="text"/> 
					External Link <input type="text"/> 

### Create Custom Allowed Worklet Task

Select Task \*  

Add Custom Name

Comment

# Content- Worker Personal Info Dashboard

You made it!

Now let people know it is there!

Or add it to the 'home' Dashboard

The screenshot shows the 'Personal Information' dashboard in Workday. At the top, there is a navigation bar with a 'MENU' icon, a 'W' logo, a search bar, and notification icons. Below the navigation bar, the 'Personal Information' section is active, with tabs for 'Personal Information', 'Contact Info', 'Dependents', and 'Career'. The main content area is divided into two columns. The left column, titled 'My Personal Information', contains a profile card with a photo and the following details: Full Legal Name (Mr. Keith Loren Bitikofer), Preferred Name (Bitikofer, Keith), Staff ID, Household ID, Gender, Date of Birth, Marital Status, Marital Status Date, Race/Ethnicity (Locale Sensitive), Denomination, and Citizenship Status (Locale Sensitive). A 'View More ...' link is at the bottom of this card. The right column contains three main sections: 'Edit My Information' with links for 'Change My Personal Information', 'Change My Photo', and 'Change My Passports and Visas'; 'Edit My Information (cont.)' with links for 'Change My Legal Name', 'Change My Preferred Name', and 'Change Biographical Information'; and 'View More Information' with links for 'Full Workday Profile' and 'My Worker Documents'. Below these is a 'Travel Tracking' section with a 'Submit Trip Itinerary Form' link. At the bottom, there is a 'Need Help? - Personal Information' section with a globe icon and the text 'Changing My Passports and Visas. You can add, change or edit passport or visa information in Workday.' To the right of this section is a 'My Passports' section with a gear icon.

# Q&A

## Next Steps:

To sign up for our newsletter:



#workdaytips

[www.linkedin.com/in/keith-bitikofer/](https://www.linkedin.com/in/keith-bitikofer/)  
[kbitikofer@enterprisemarketdesk.com](mailto:kbitikofer@enterprisemarketdesk.com)

To talk with our team:

