

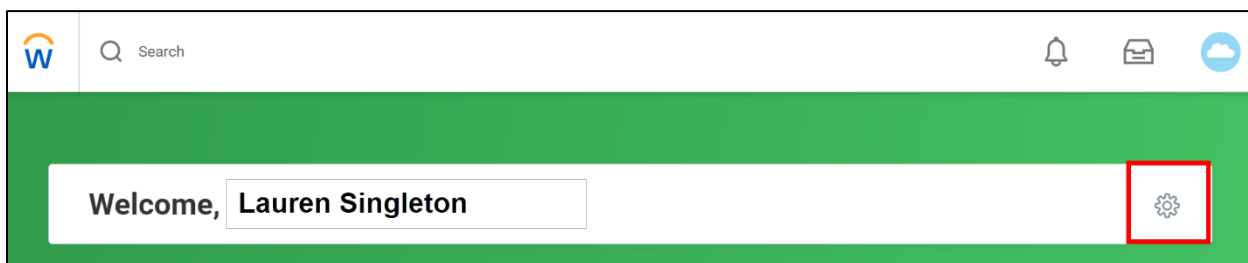
Dashboards in Workday

Dashboards are pre-configured pages related to functional areas within Workday. They are populated with related charts and data. Some may also include related tasks, menus, and announcements. In Workday, data can be entered using “tasks” and viewed using “reports.” The Workday Home page displays *Applications* that provide access to tasks and reports.

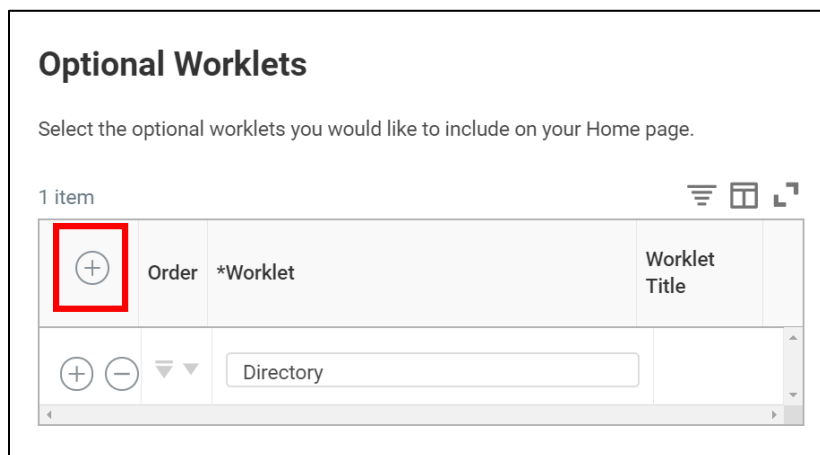
How to Configure the Homepage Dashboard

Note: Some dashboards may not allow the end user to remove or add applications. This will vary based on MSU’s security settings.

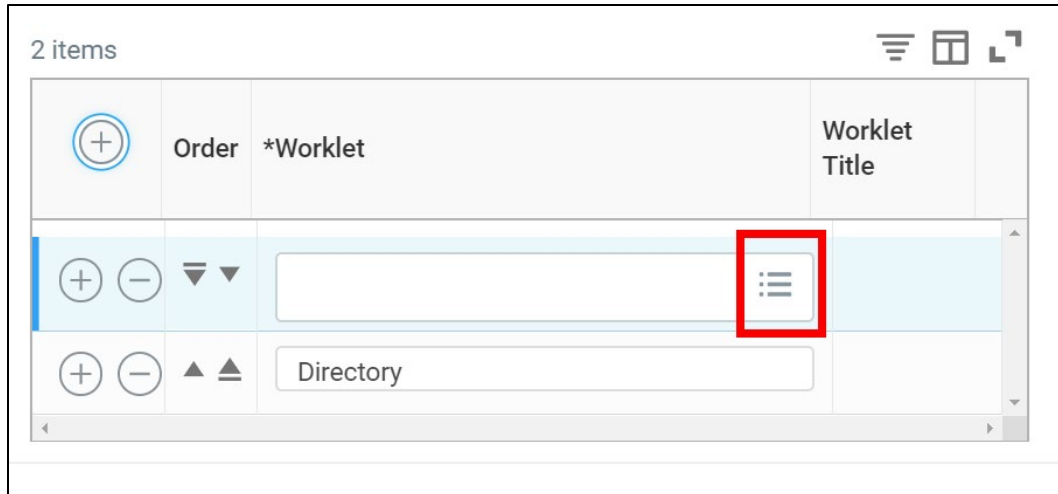
- 1) From the Homepage, click the **Settings** icon.



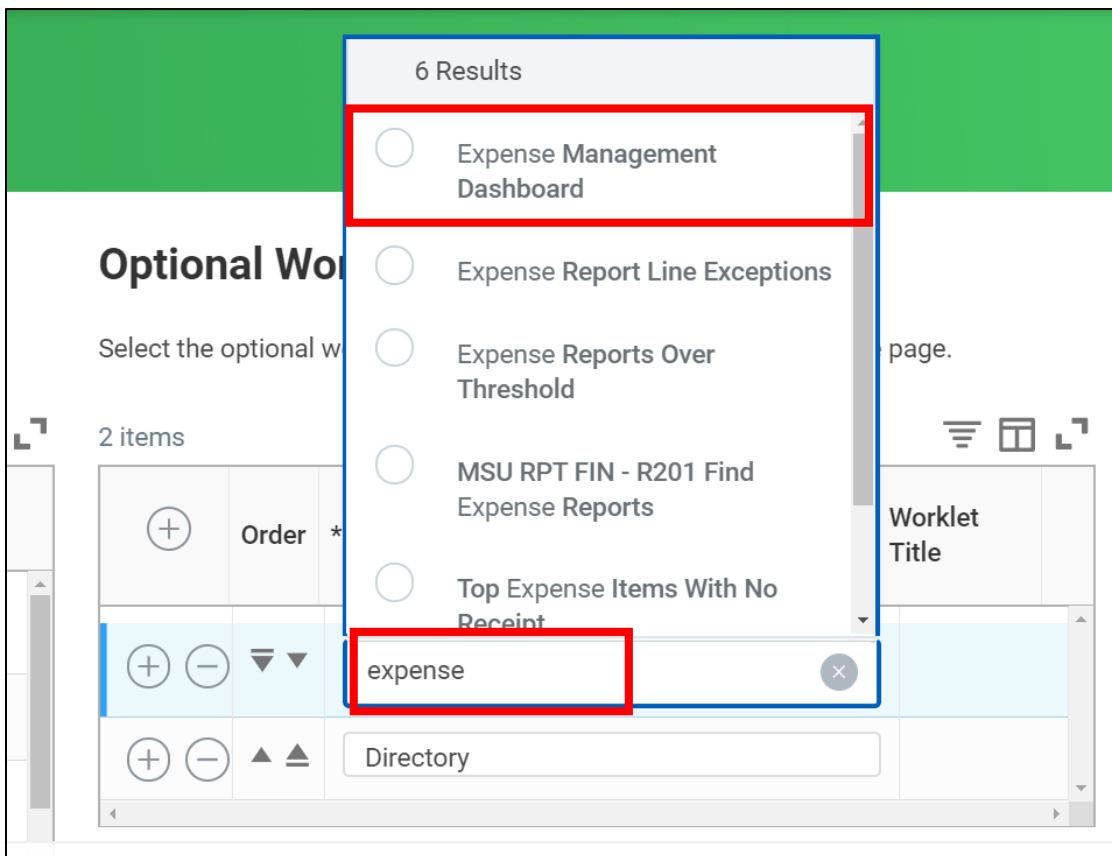
- 2) Under **Optional Worklets**, click the **Add Row** icon to add a new application.

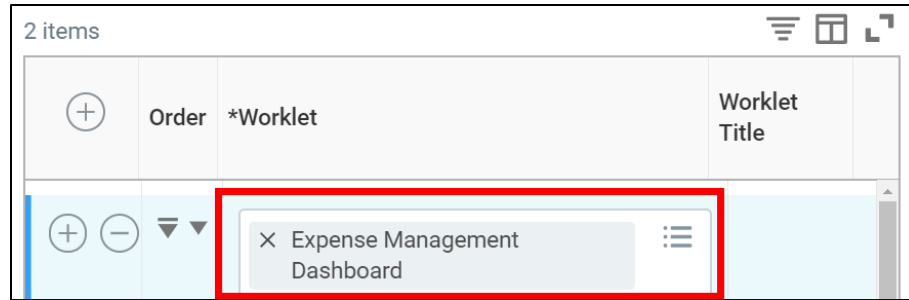


- 3) Click the **Prompt** icon to select from the list of existing applications.

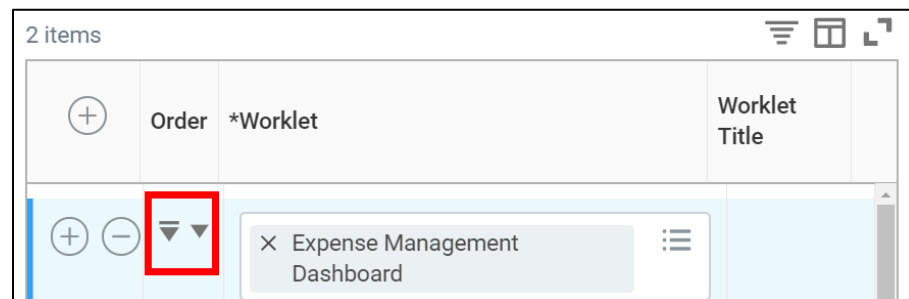


- 4) Select the application or dashboard to be added. For this example we will be adding the *Expense Management Dashboard*.





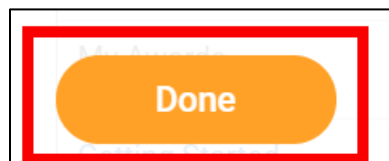
- 5) Click the **Move Row Up** or **Move Row Down** arrow to reorder the applications on the page.



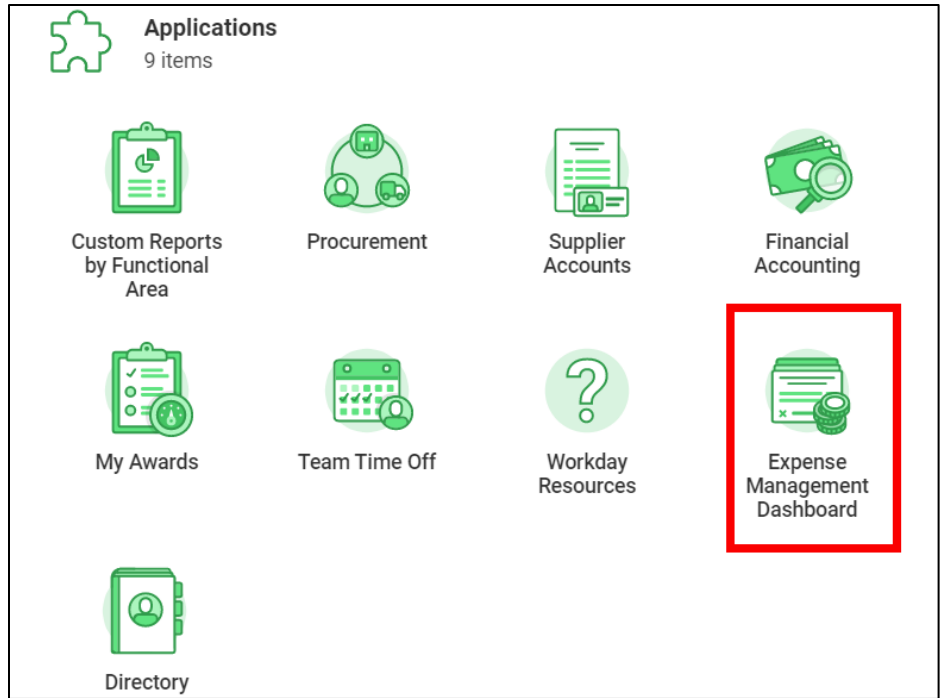
- 6) Click **OK** at the bottom of the screen.



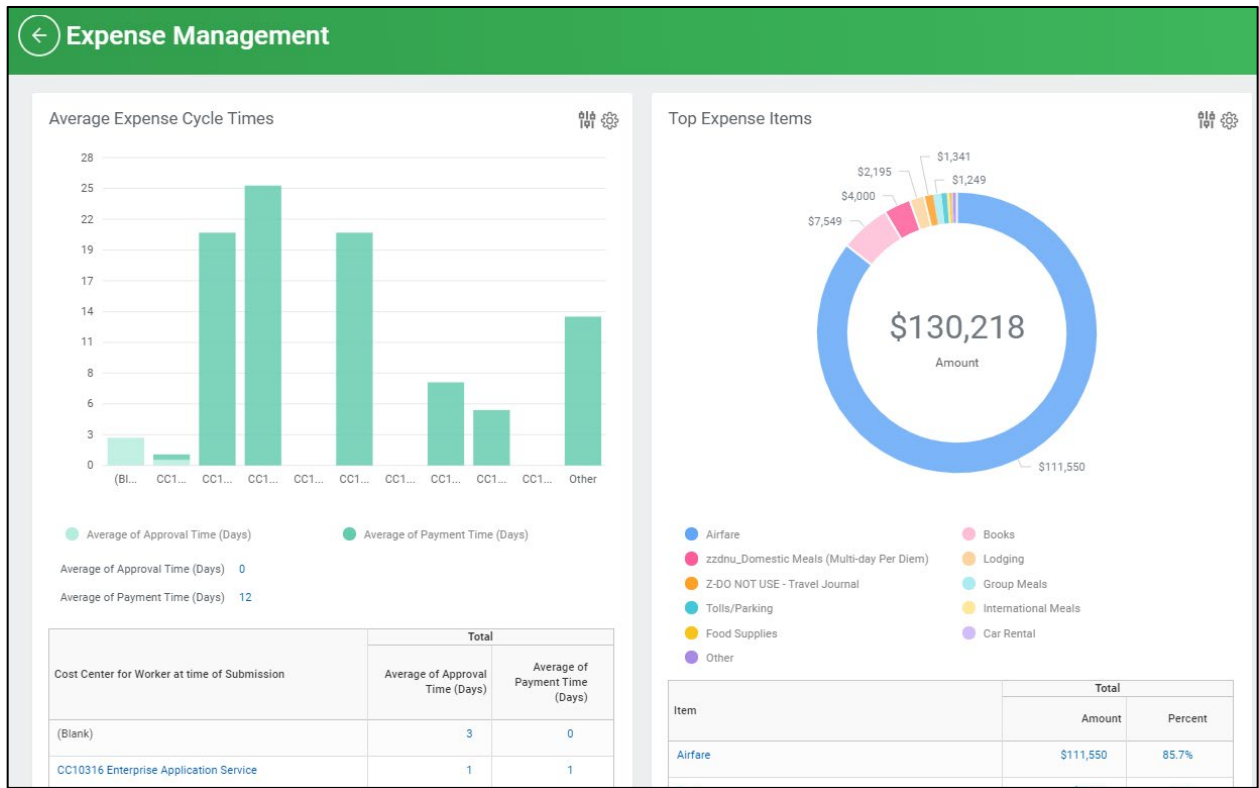
- 7) Click **Done** at the bottom of the screen to be directed back to the Homepage



- 8) Under the **Applications** section, check to see if the application has been successfully added. Click the newly added application to be directed to the dashboard.



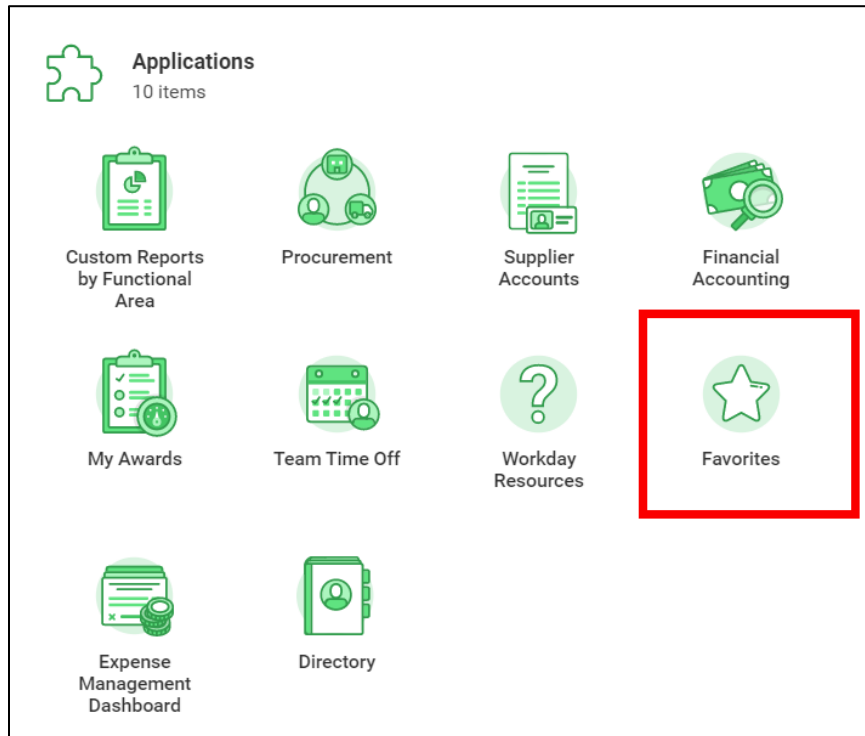
The dashboard displays and is made up of the data related to the specific area. Each window in the dashboard helps to analyze the data from different points of view. By clicking on blue lines of data, you can drill to get specific information on the data point.



Add to Favorites

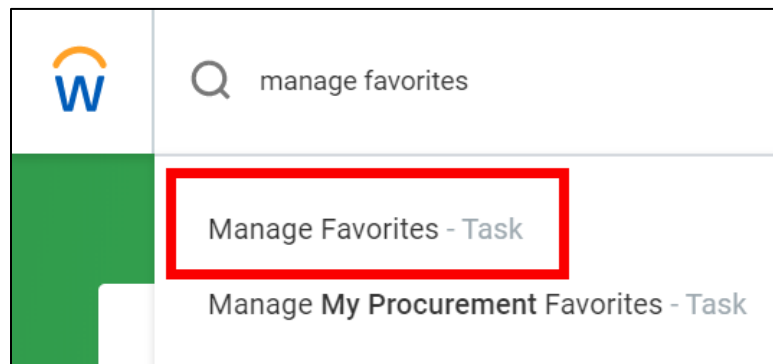
Reports, tasks, or business objects (cost centers, employees, organizations) that are used often can be added to your favorites. **Favorites** can then be found in the **Favorites** application or under favorites in the profile menu.

IMPORTANT: The Favorites application does not automatically appear and needs to be added manually. The **Favorites** application can be added following the steps in the **How to Configure the Homepage Dashboard** section above.

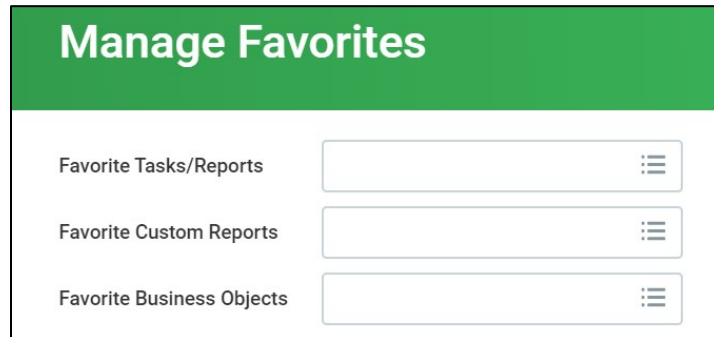


To add to **Favorites**, follow the steps below:

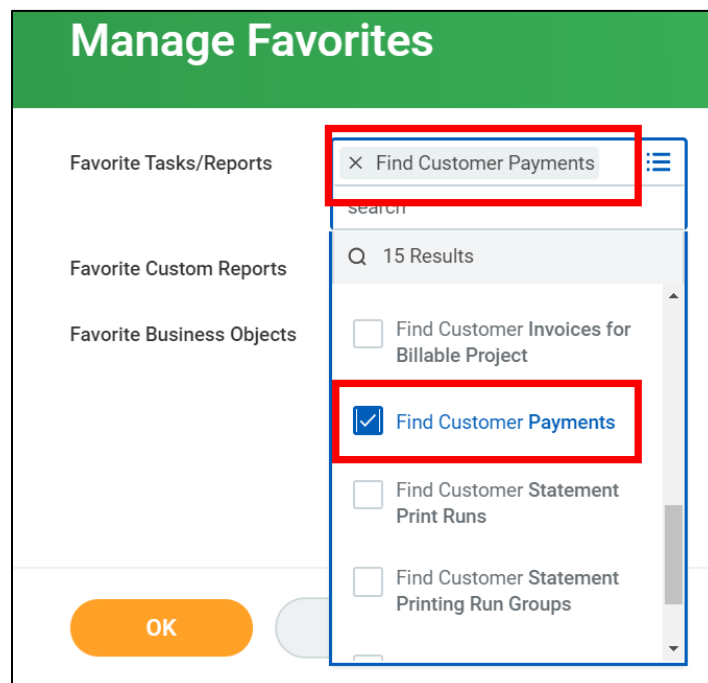
- 1) Enter **Manage Favorites** into the *Search* bar and select it from the results.



- 2) From the *Manage Favorites* screen, click the menu prompts in the **Favorite Tasks/Reports**, **Favorite Customer Reports** or **Favorite Business Objects** to browse available items. Another option is to type the name of an item and hit enter.

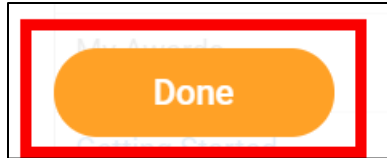


- 3) Click on the item browsed or typed to add it to the field(s). For this example, we will be adding *Find Customer Payments for Organization* report. Please add Favorites that are relevant to your business processes.



- 4) Click **OK** at the bottom of the screen, then click **Done**.





The object is now in the application or in your favorites list and will appear when the **Favorites** application is clicked.

