UR Financials

User Interface changes for Workday 24

March 2015
Overview

• This presentation highlights the changes from Workday 23 to Workday 24
• User Interface today
• User Interface after March 14, 2015
  – Each slide reflect on change
  – Refer to the notes section for details

Scheduled downtime: Upgrade occurs on March 14, 2015
UR Financials access provided back on March 15th
In Workday 23 the first User interface screen appeared as depicted above.

• The very first time you logged in, you saw the Let’s Get Started screen
• This intro screen shows the Workday 23 user interface and took you on a virtual tour to let you know where everything was:
  • Search
  • Navigate
  • Profile
  • Inbox
Workday 23 Home Page

• Home page sets up to provide one-click access to commonly used features
  – Common Financial Reports Worklet
  – Favorite Worklet can be customized
  – Scheduled reports delivered to “W” drive
  – Everything you need at your fingertips!

In Workday 23 (prior to March 14, 2015) the User interface appears as depicted above.

• Your UR Financials home page provides one-click access to commonly used features
  • Navigation Menu
  • Search bar
  • Workday logo
  • Profile icon
  • Inbox
  
Home page
  • Common Financial Reports Worklet shows commonly used reports pushed to users on their home page—this is not customizable, but can be refreshed to show the latest pushed reports
  • Customizable Worklets (Favorites) can show your frequently used reports (use this for reports you have created filters for)
WD 24 Interface Updates

- Home icon added
- Menu and Inbox merged into Profile icon
- Worklets are color coded and adjust to fit screen
- Grants Dashboard accessible via a Worklet

- Floating Approval bar for long criteria/filter views

The updated UR Financials user interface will change its look after March 14, 2015. This is due to the scheduled Workday version24 upgrade.

Here are some of the changes you will see:
- Edges softened
- Home icon added
- Navigation Menu (three lined column icon) removed - W: drive, Inbox, and other items merged with the Profile icon
- Grants Dashboard added to Worklets Configuration
- Worklets will fill entire screen, until you add more
- Floating approval bar on long interactive screens

Remains the same:
- Workday logo takes you home
- Use Profile icon to log off
- Cog to add worklets onto the Home page
In WD 24 to retrieve the **Inbox**:

- It is now located within the Profile icon and the Inbox icon has been removed from the home page
In WD 24 to retrieve the following for **Home page**:

- Added Home Button
- Workday logo
- My Workday 2.0 sub menu under Profile icon
In WD 24 to retrieve the following use the Profile icon:

- Inbox
- Notifications
- W: drive

- Still sign out using Profile icon
In WD 24 to retrieve the following for **Worklets**:

- To add worklets, still use Cog in upper right hand corner of home screen
- Worklets are Color coded at the top of the section
- Worklets will now adjusts to fit screen size/resolution
- Grants Dashboard used to quickly access Grant reports will now be accessible via a Worklet. Search for Dashboard when adding a worklet to your home screen to add to your home page

- The Cog still manages worklet items
In WD 24 to retrieve the following for Approval bar:

- The Approval bar floats as you scroll up or down on views that have a scroll bar. This makes it easier to run report criteria and click through other screens.

- Regarding reports Save Filters is still located at the bottom of the page.