

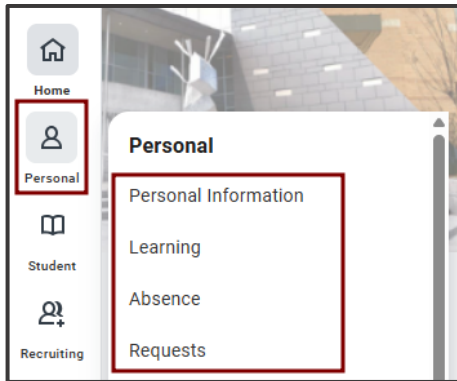
Workday Navigation: Global Navigation Sidebar

This job aid introduces the Global Navigation Sidebar and provides tips for using it to enhance your Workday experience.

The Global Navigation Sidebar gathers apps, tasks, and shortcuts into a central location and allows you to customize your view to facilitate quick and efficient navigation.

VIEW AND CUSTOMIZE CATEGORIES

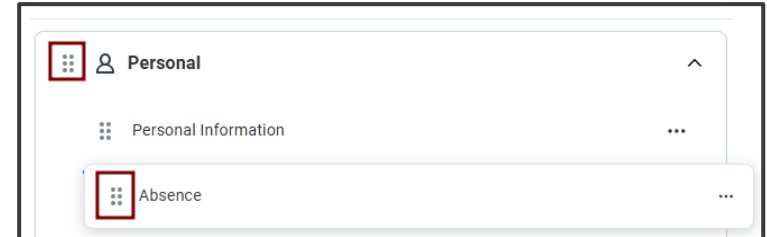
The Global Navigation Sidebar is grouped into categories containing related tasks, and reports. Hovering over a category displays those items, allowing you to click and open any of them.



You can change the order of the categories in the sidebar, as well as the items within each category to fit your preferences. To do this, follow the steps below.

1. Click the **Customize** cog at the bottom of the sidebar.
2. Click to the left of an item within a category and hold to drag and drop it in the order you want.

3. Click to the left of a category and hold to drag and drop it in the order you want.



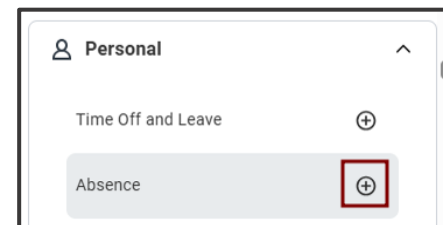
Note: Items cannot be moved between categories, only rearranged within them.

4. Click **Save Changes**.

ADD/REMOVE MENU ITEMS

You can add or remove items from the menu as desired, following the steps below.

1. Click the **Customize** cog at the bottom of the sidebar.
2. Click **Add Menu Items**.
3. Search for an item or select one from the list displayed.
4. Click the plus button to the right of the item to add it to the appropriate category.

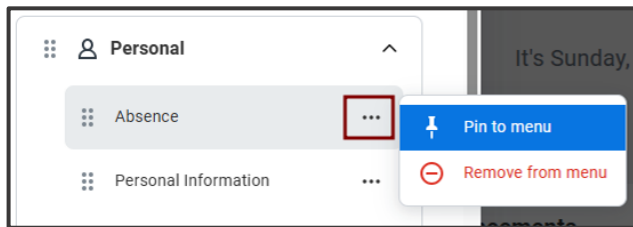


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Note: Multiple items can be selected to be added at one time.

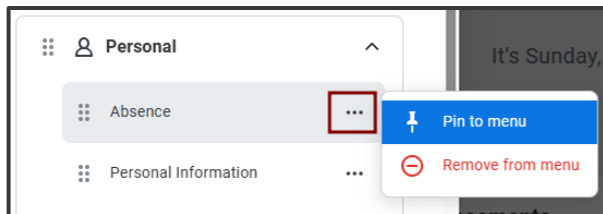
5. Click **Add Item**.
6. Click **Save Changes**.
7. To remove an item, click the Related Actions button next to an item in the menu and select **Remove from menu**.



PIN MENU ITEMS

Up to four items can be pinned to the top of the menu, keeping your most commonly used apps easily accessible.

1. Click the **Customize** cog at the bottom of the sidebar.
2. Find the item you want to pin.
3. Click the related actions button to the right of the item.
4. Select **Pin to menu**.



5. Click **Save Changes**.

6. To remove a pinned item, select the related actions button next to the item and select **Unpin from menu**.

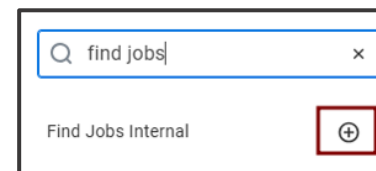
VIEW/EDIT SAVED ITEMS AND SHORTCUTS

In addition to the categories and apps in the sidebar, you can also use the Saved section to add shortcuts or favorites to be easily accessible.

ADD/EDIT SHORTCUTS

Shortcuts can be tasks, reports, or external links. Add a shortcut following the steps below.

1. Hover over the **Saved** icon on the sidebar.
2. Click **View All Saved**.
3. In the Shortcuts section, click Add Shortcuts.
4. Search for a task, report, or link you want to add.
5. Click the plus button the right of the item.





6. Click **Add Shortcut**.



Note: A maximum of 10 shortcuts can be added.

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7. To edit shortcuts, click **Edit Shortcuts** and then click and drag to reorder the items as desired.
8. Click **Save Changes**.

 Note: Look for the 'Save' icon  on tasks and reports to quickly add that item to your shortcuts

ADD/EDIT FAVORITES

In addition to shortcuts, you can save tasks and reports as favorites to be accessed quickly.

1. Hover over the **Saved** icon on the sidebar.
2. Click **View All Saved**.
3. In the Favorites section, click **Manage Favorites**.
4. Search for and select the task or report to add in the correct field.
5. Click **OK** then click **Done**.

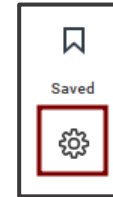
SHOW/HIDE GLOBAL NAVIGATION SIDEBAR

The Global Navigation Sidebar can be displayed or hidden as desired. Follow the below directions to hide or unhide.

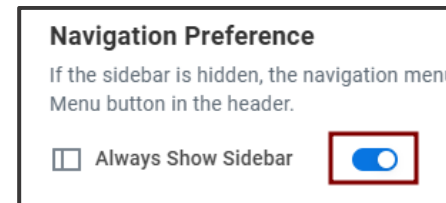
HIDE GLOBAL NAVIGATION SIDEBAR

If the Global Navigation Sidebar is visible and you would like to hide it:

1. Click the **Customize** cog at the bottom of the sidebar.



2. Click to toggle off the **Always Show Sidebar** slider.

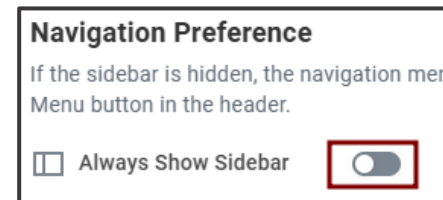


3. Click **Save Changes**.

SHOW GLOBAL NAVIGATION SIDEBAR

If the Global Navigation Sidebar is hidden and you would like to show it:

1. Click the Global Navigation Menu button.
2. Click **Customize**.
3. Click to toggle on the **Always Show Sidebar** slider.



4. Click **Save Changes**.