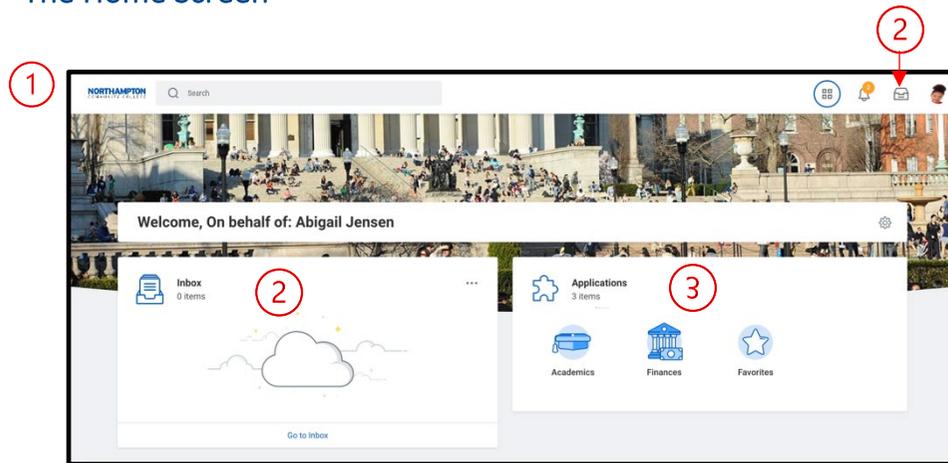


## Overview

This quick reference guide will cover some of the basics of navigating Workday. In this document, you will see instructions for:

- Understanding the home screen
- Viewing your profile
- Viewing your Academics Dashboard
- Viewing your Financials Dashboard

## The Home Screen



The screen above will appear when logging into Workday in a desktop browser. See below for a key of the important items on this screen:

1. At any point, you can click on the **Northampton Logo** to return to this home screen.
2. On the main Workday screen, you will see a preview of your inbox items here. You can also access your full inbox by using the **Inbox icon**.

3. These are your **Applications**. Applications provide quick access to dashboards that allow you to view your information and perform certain tasks in Workday. As a student, you will have **Academics**, where you can view and modify your academic information, and **Finances**, where you can view your financial and financial aid information.

4. These icons, from left to right, are:



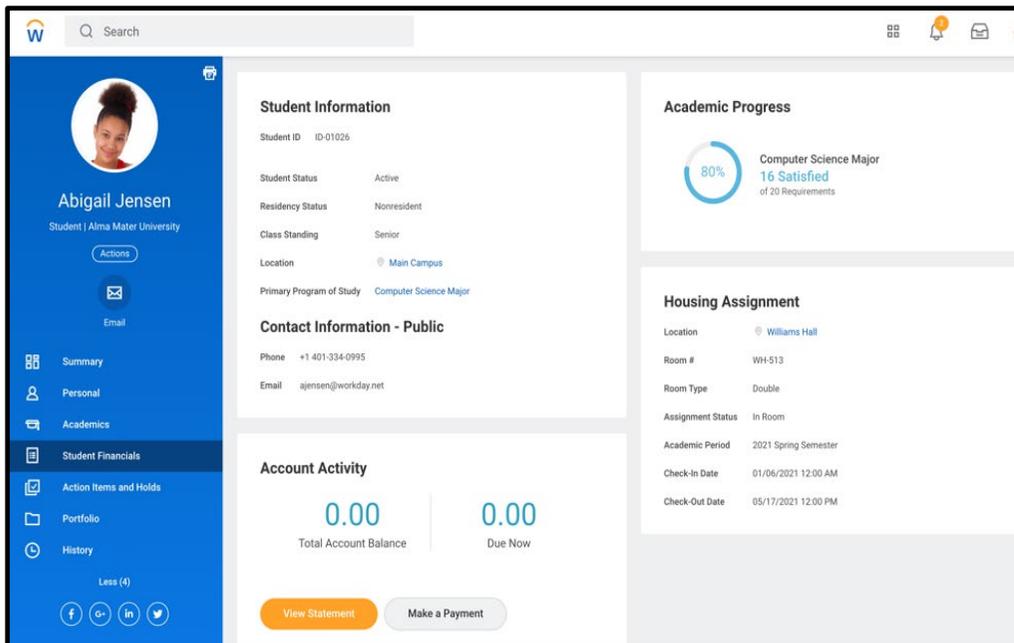
- **Quick Access:** This icon provides quick access to recently used tasks.
- **Notifications:** This icon will show your notifications and alerts. For example, if you submit a request that requires approval, such as a request for an override of a prerequisite, the instructor will receive an inbox item for approval or denial, once completed by the instructor, you will receive an item in **Notifications** informing you of the instructor's decision and next steps.
- **Inbox:** Items that you need to review or take action on will appear in your inbox, for example, completing student onboarding or action items.
- **Profile:** This icon allows you to access your user settings as well as your **Profile**, a comprehensive summary of your personal, academic, and financial information.

## Viewing your Profile

1. To see your profile, click the **Profile** icon at the top right corner of the screen and click **View Profile**.



2. Your profile is a summary screen where you can view your personal, academic, and financial information.



3. The tabs along the left side of this screen are:

- **Summary:** This tab will have several reports detailing summary information for your record, including money you owe, your academic progress, and your student information.
- **Personal:** Use this tab to view and modify your personal data, such as names and contact information.
- **Academics:** Use this tab to view your current courses, course history and grades, transfer credit, and academic progress details.
- **Student Financials:** Use this tab to view your bill and past transactions and payments.
- **Financial Aid:** Use this tab to view your financial aid.
- **Action Items and Holds:** Use this tab to view your current holds and action items.

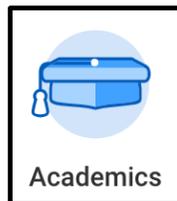


# Workday Student 101 for Students

## View my Academics Dashboard

The Academics Dashboard provides an easy view of your academic information, including course schedule, grades, advisors, holds, as well as links to registration and other tasks.

1. From the home screen, click the **Academics** application.



2. You will now see the **Academics** dashboard.

3. Key items on this screen are:

- **My Holds:** If you are having trouble registering, check this box to see if you have any holds that are prohibiting you from registering in classes.
- **Requests:** Forms can be completed online through this *Request Framework*. To view available forms, click the **Create Request** link and choose the appropriate form.
- **Important Contacts Support Network:** This box will list individuals who can assist you, such as Advisors or Navigators.
- **Upcoming Registration Appointments:** Registration appointments drive the time and date range in which you are permitted to register.
- **Find Course Sections:** Use this link to view course sections (classes) and to begin the registration process or create a potential schedule for a future semester.
- **Current Schedule:** See this box to view your course sections for the current semester.

The screenshot shows the Academics dashboard with several sections highlighted:

- My Holds:** A table with columns: Hold Details, Hold Reason, Description, Resolution Instructions, Hold Types. It shows "No Data".
- Current Schedule:** A table with columns: Course Listing, Instructional Format, Meeting Pattern, Location, Instructor. It shows "No Data".
- Important Contacts Support Network:** A table with columns: Role, Student Cohort, Photo, Person. It lists individuals like Cathi Dill and Wallis Fitzge.
- Upcoming Registration Appointments:** A table with columns: Start Date within, Start Time, End Time, Time Zone. It shows an appointment for "2020 Fall Semester (D9/)" on "04/10/2020" at "GMT-08:00".
- Academic Progress:** A circular progress indicator showing "80%" for the "Computer Science Major" with "16 Satisfied of 20 Requirements". It also shows "Cumulative GPA: 3.075" and "Program of Study GPA: 3.115".
- Common Tasks:** A sidebar menu with items like "Find Courses", "Find Course Sections", "Explore Programs of Study", "More (2)", "Academic Records", "View My Courses", "View My Academic Plan", "View My Academic Progress", "View My Advising Appointments", "Requests", "Request Advising Appointment", "Create Request", "Request My Accommodations", "More (2)", and "Transcripts".



# Workday Student 101 for Students

## View my Financials Dashboard

The Finances Dashboard allows you to see information about your financial aid as well as your payments, charges and transactions.

1. From the Workday home screen, click the **Finances** application.



2. You will now see the Finances dashboard.

The screenshot shows the Workday Finances dashboard with several sections highlighted:

- My Financial Aid Action Items** (red box): Shows a progress bar for 'Financial Aid Application (2020-2021 Award Year)' with the latest step completed.
- Account Activity** (green box): Displays 'Total Account Balance' and 'Due Now' as 0.00, with buttons for 'View Statement' and 'Make a Payment'.
- Recent Payments** (yellow box): A table showing a payment of 442.60 to Abigail Jerisen on 05/02/2019.
- My Account** (purple box): Includes links for 'View Account Activity' and 'View Statement'.
- Accept/Decline Awards** (red box): A link located under the 'Financial Aid' section.

Student Payment	Date	Payment Amount	Student	Payment T
...	05/02/2019	442.60	Abigail Jerisen	Check

3. Key items on this screen are:

- **Financial Aid Action Items:** These are items for financial aid that you may need to complete, such as completing and submitting forms.
- **Recent Payments:** This box will display recent payments made (payments are updated through a nightly system process and may not appear until the following business day).
- **Account Activity:** This will display a summary of your account.
- **View Account Activity and View Statement:** Use these to view more detailed information about your account transactions.
- **Accept/Decline Awards:** Use this link to accept/decline financial aid awards.

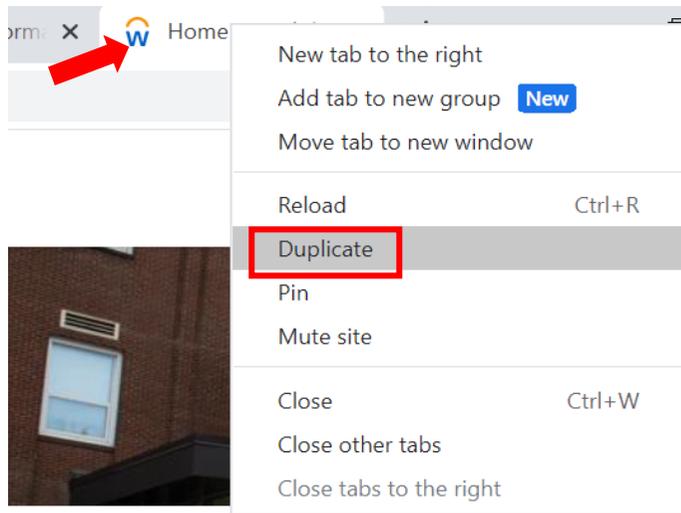


# Workday Student 101 for Students



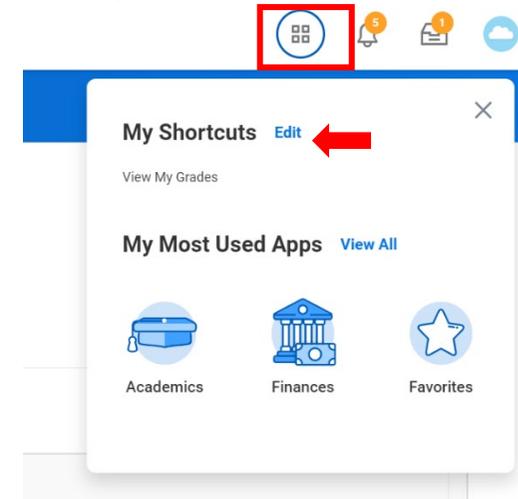
## Tips and tricks for navigating in Workday!

1. For the best user experience, Google Chrome is the recommend web browser when accessing Workday.
2. The "Back" arrow can be successfully used to navigate in Workday.
3. You can open duplicate browser tabs for easy viewing of multiple Workday screens. For example, you can view your current classes in one tab and search for other courses in a duplicate tab.
  - a. Move mouse cursor over the browser tab, right click, and choose "Duplicate".

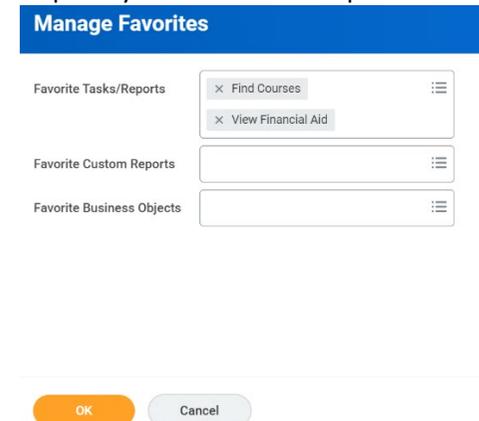


4. Clicking on **NORTHAMPTON** in the upper left corner will bring you back to your "Home" screen/dashboard.

5. The "Quick Access" and "Favorites" applications can be customized by adding frequently used tasks and reports.
  - a. Click the "**Quick Access**" icon, use "Edit" to customize.



- b. Open the "Favorites" application, click on the  (Gear icon) > *Manage Favorites*. Use the search bar to locate frequently used tasks and reports.





# Workday Student 101 for Students

6. In several views you will see the icons below.
  - a. [Export documents to Excel](#)
  - b. [Filter data](#)
  - c. [Edit grid preferences](#)
  - d. [Toggle to Fullscreen view](#)

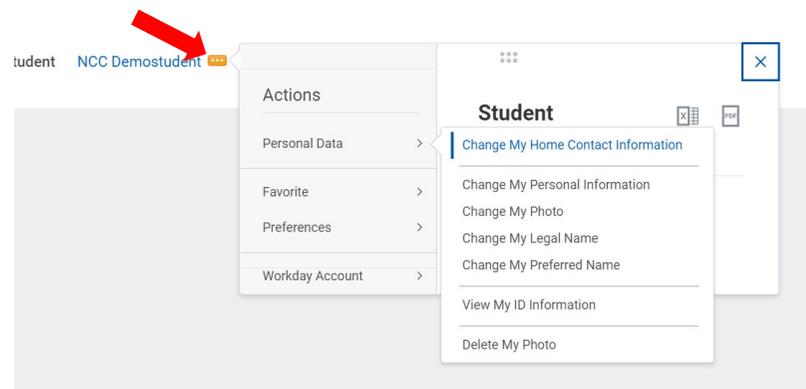


7. Orange **“Alerts”** are informational warnings and will allow you to proceed.
8. Red **“Warnings”** indicate items that will need to be addressed prior to moving on.
9. Use the Workday “Search” field to find tasks and items quickly by searching on “key” words or partial words (e.g., Type “grades” or “my gra” and the report “View My Grades” will come up.



- a. **TIP** – If unsure of the spelling or exact name of the report/task use part of the word or phrase to broaden search results.

10. **Blue** highlighted items/words are links for additional information.
11. The **Troubleshoot** button will indicate why you cannot complete a particular task such as registering for a course without meeting the eligibility requirements.
12. Clicking on the “Ellipsis” will show additional information or actions.



13. Completed “Inbox” items will move into the “Archive” tab.
14. “Process” will list the steps of a task or request.