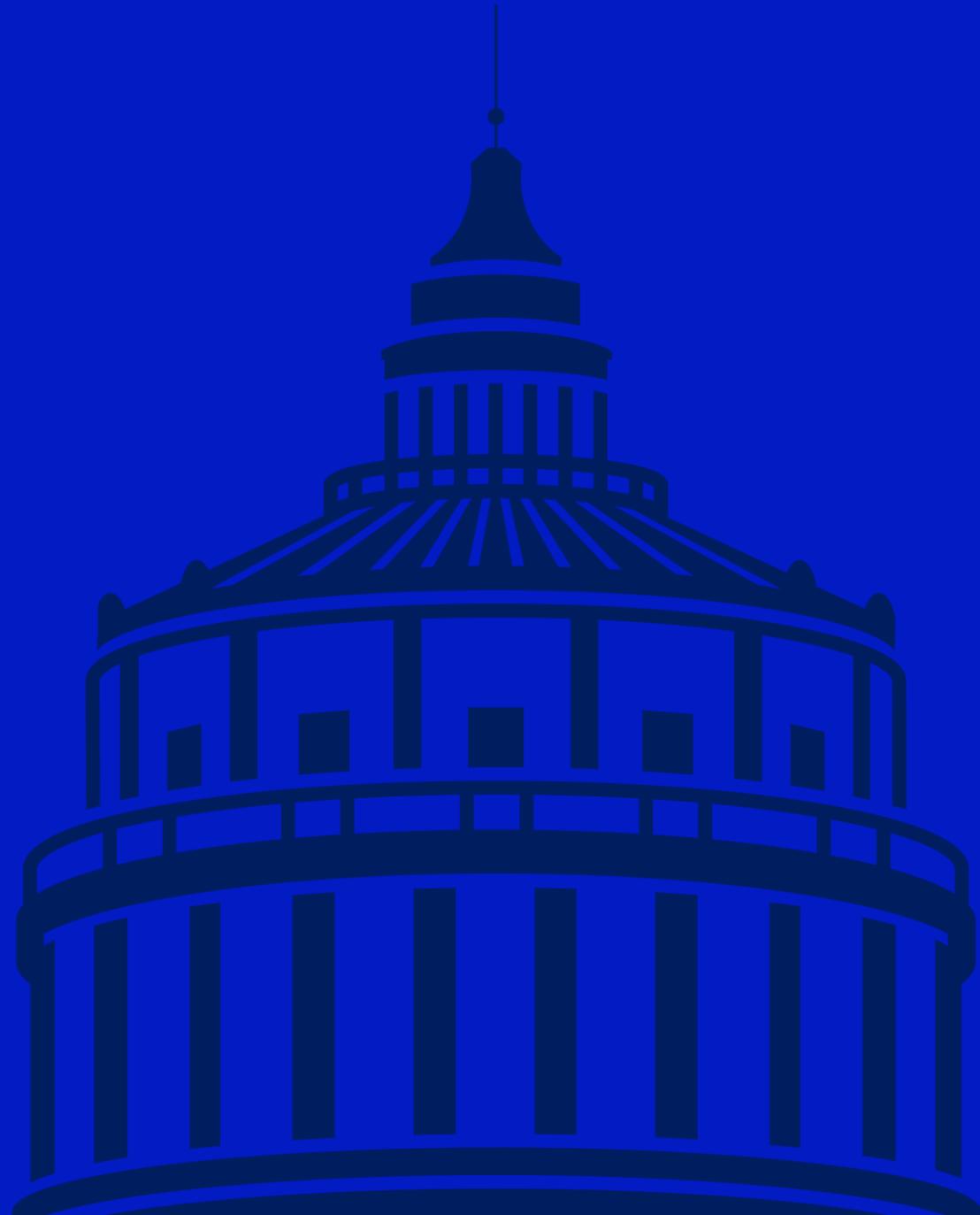




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Personalize your Workday Experience

- Tailor your navigation display
- Save your favorite tasks and reports
- Customize your search preferences



Tailor your navigation display

- Top Apps have been replaced with a Pinned Menu, that you can control
- Hover on each category to see related tasks or dashboards
- Use the Gear button to re-sequence categories, or items within categories

Pinned Menu –
Hover on each
item to preview
details.

Pinned Menu –
Hover on each
item to preview
details.

Save up to 10
favorite tasks

Customize your
pinned menu
display

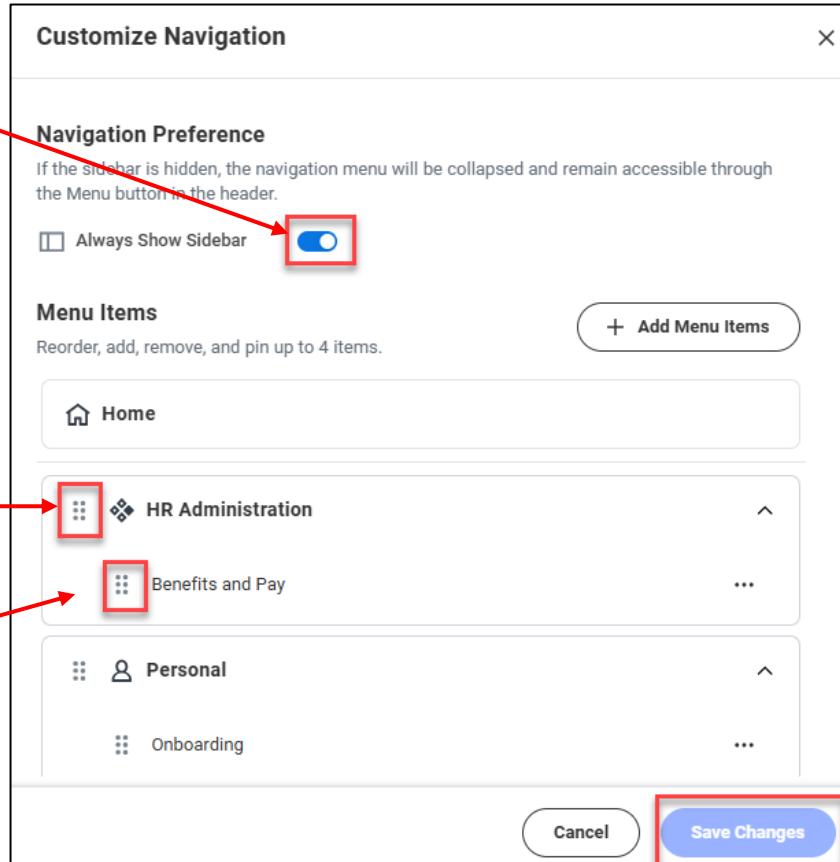
Tailor your navigation display, cont.

Suppress the pinned menu display if homepage space is a concern...

Re-access the gear button to change it back!

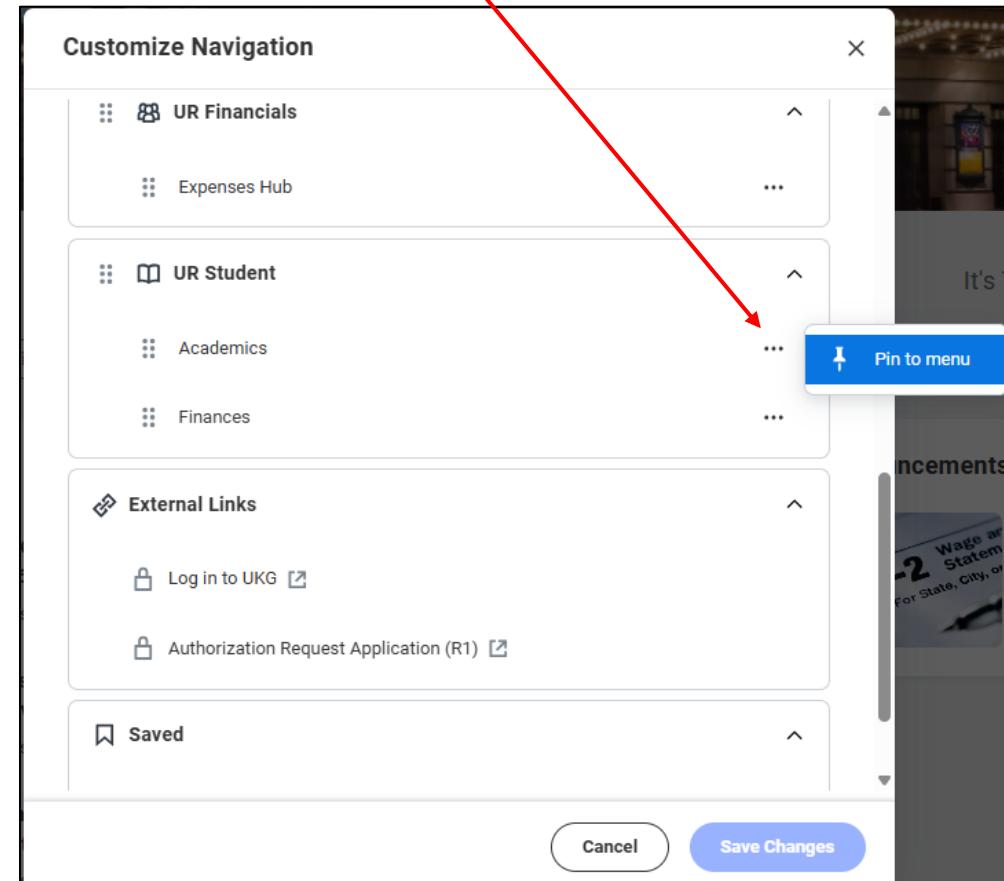
Use the  to drag and re-order your categories (up and down)

Or drag and re-order items within each category



Don't forget to save!!

Click on the  to pin up to 4 items directly on the menu bar at the top



Save your favorite tasks and reports



Use the **Saved** on the bottom left of your homepage to access Shortcuts or Favorites.

Shortcuts are pinned directly to the navigation bar (max of 10). Favorites can be seen using [View All Saved](#).

Add them directly

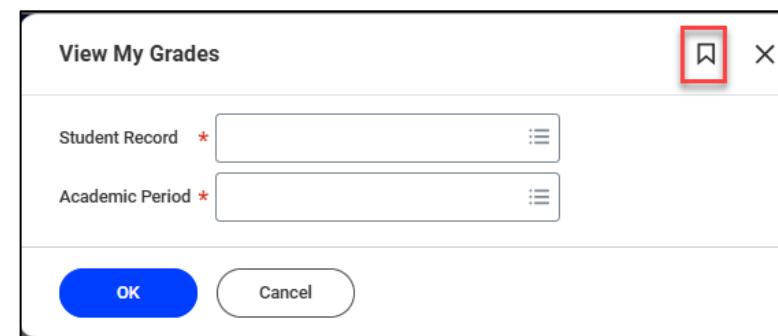
Search by task or report name

You can then access them quickly once they are saved

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You can also save unlimited tasks and reports to your Favorites (do not appear in navigation bar)

Task....



Or report....



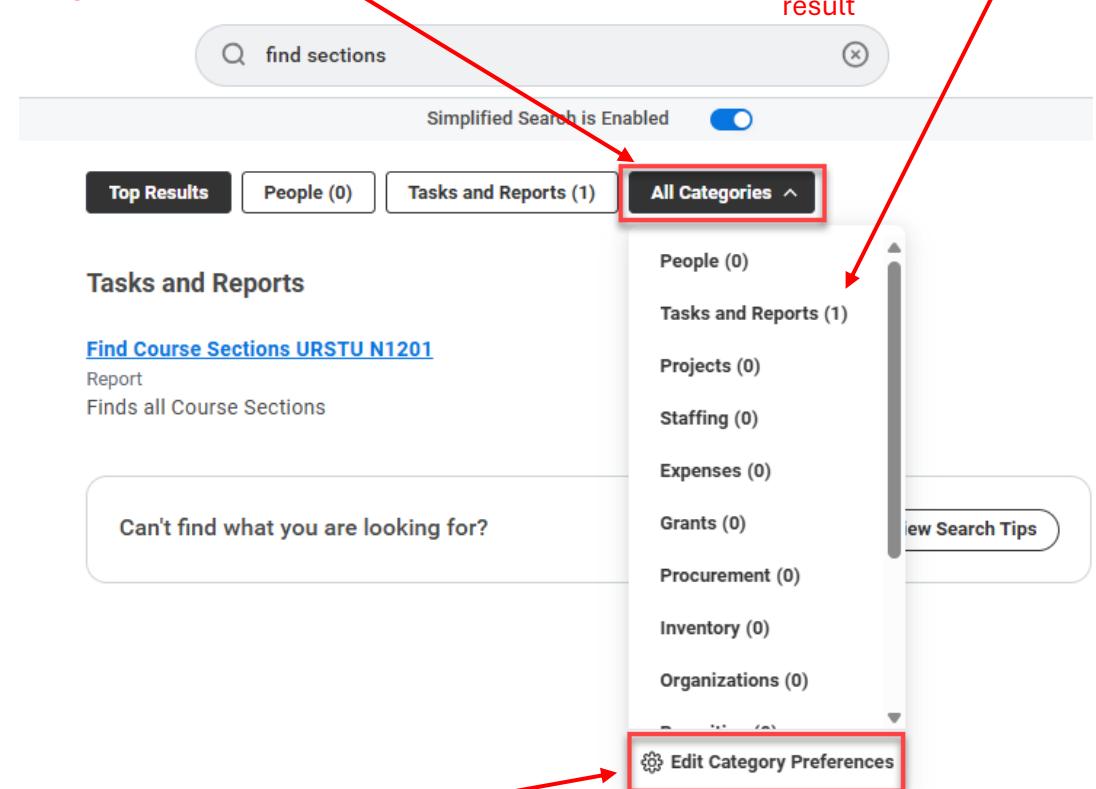
Note: not all tasks and reports support this feature



Customize your search preferences

Can't find what you are looking for when you search?

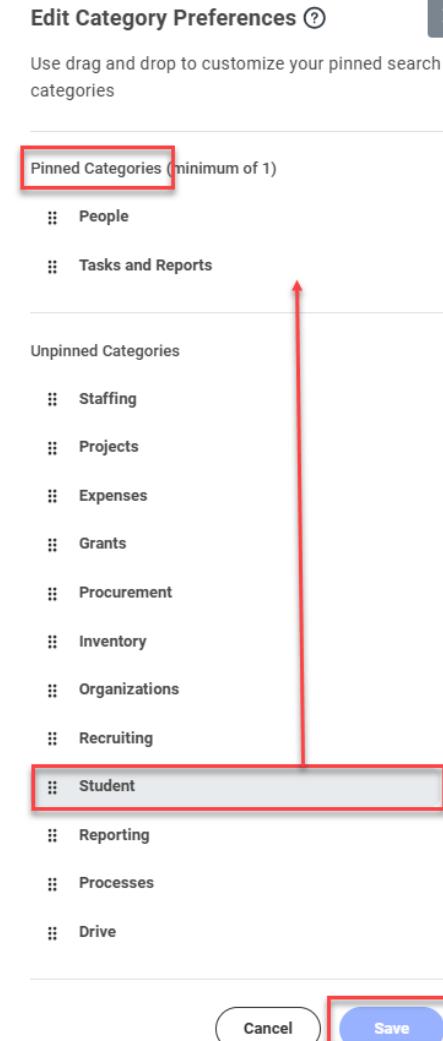
Use the All Categories button to see all possible search categories.



A screenshot of a search interface. At the top is a search bar with the placeholder "find sections" and a magnifying glass icon. Below the search bar is a toggle switch labeled "Simplified Search is Enabled". Under the search bar are several buttons: "Top Results" (black), "People (0)", "Tasks and Reports (1)", and "All Categories ^" (highlighted with a red box). A dropdown menu titled "All Categories ^" is open, listing categories with counts: "People (0)", "Tasks and Reports (1)", "Projects (0)", "Staffing (0)", "Expenses (0)", "Grants (0)", "Procurement (0)", "Inventory (0)", and "Organizations (0)". At the bottom of this menu is a red box around the "Edit Category Preferences" button. A red arrow points from the text "Use the All Categories button to see all possible search categories." to the "All Categories ^" button. Another red arrow points from the text "This category has a search result" to the "Tasks and Reports (1)" button. A third red arrow points from the text "Use Edit Category Preferences to 'pin' which categories you would like to automatically display on your search page" to the "Edit Category Preferences" button.

Use Edit Category Preferences to 'pin' which categories you would like to automatically display on your search page

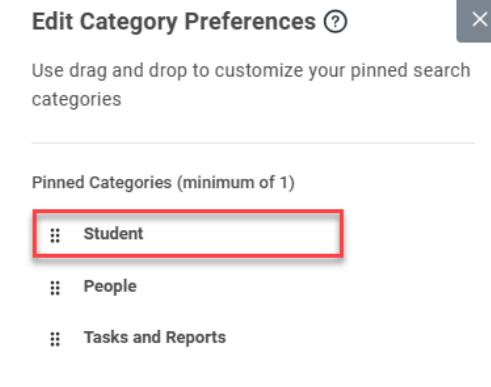
Just grab the category you want pinned and pull it up into the Pinned Categories area!



A screenshot of the "Edit Category Preferences" dialog. The title is "Edit Category Preferences" with a help icon and a close button. The main area says "Use drag and drop to customize your pinned search categories". Below this is a section titled "Pinned Categories (minimum of 1)" with a red box around it. It contains "People" and "Tasks and Reports". Below this is a section titled "Unpinned Categories" with a red arrow pointing to the "Student" category, which is highlighted with a red box. The "Student" category is listed under "Unpinned Categories". At the bottom are "Cancel" and "Save" buttons, with "Save" highlighted with a red box. A red arrow points from the text "Just grab the category you want pinned and pull it up into the Pinned Categories area!" to the "Student" category in the list.

Don't forget to save!

You will now see Students first on your search page when searching by name or Student ID



A screenshot of a search interface showing the results for "Student". The results list "Student" at the top, followed by "People" and "Tasks and Reports". The "Student" category is highlighted with a red box. A red arrow points from the text "You will now see Students first on your search page when searching by name or Student ID" to the "Student" category in the results list.