
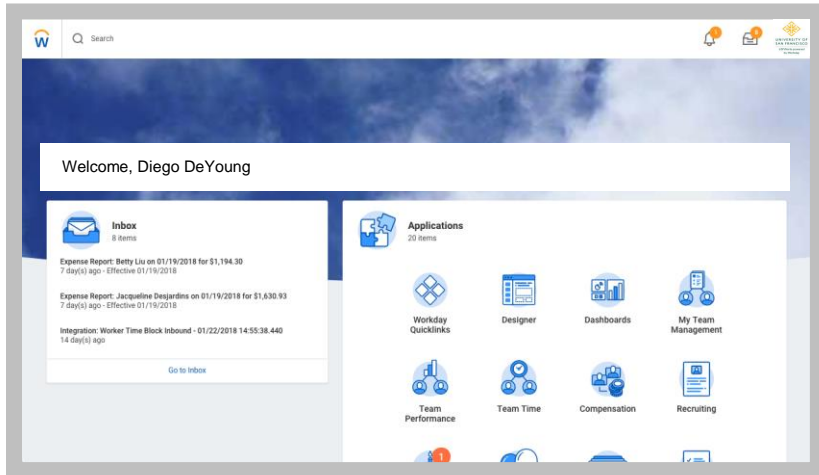





NAVIGATE THE HOME PAGE






In Workday, you can use tasks to enter data and reports to view data. The Workday Home page displays applications  that provide access to tasks and reports. Because the Home page is highly configurable, your organization may display different applications.



CONFIGURE WORKLETS

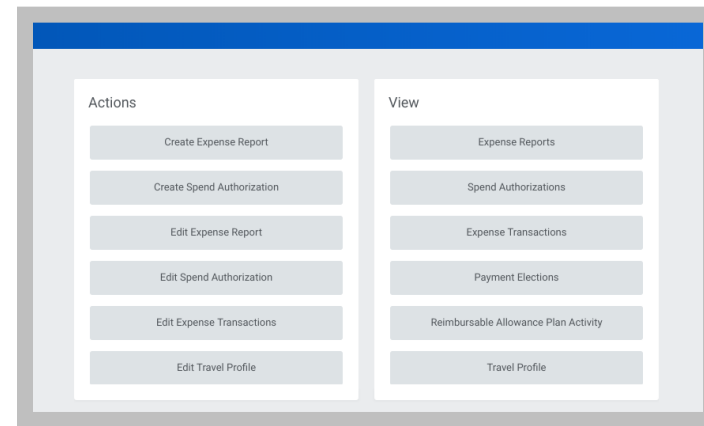
You can add, remove, and arrange applications on your Home page. From your Home page:

1. Click the **Configure Applications** icon  in the upper-right corner. The Configure Worklets page displays.
2. Click the **Add Row** icon  to add a new worklet.
3. Click the **Prompt** icon  to select from the list of worklets to which you have access.

4. Click the **Remove Row** icon  to remove an application from the Home page.
5. Click the **Move Row Up** arrow  or **Move Row Down** arrow  to reorder the applications on the page. To move an application to the first or last position, use the **Move Row to Top**  or **Move Row to Bottom** arrows .
6. Click **OK** and **Done**.

COMMON WORKLET MENU

After selecting an application, you may see a page layout similar to the image below:

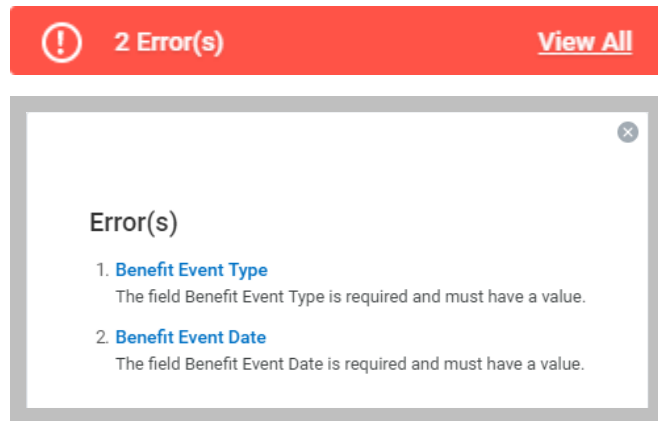


This is a common layout for worklets. There are Actions and View sections. Buttons under the Actions section link to tasks you can perform. Buttons under the View section link to reports you can view.

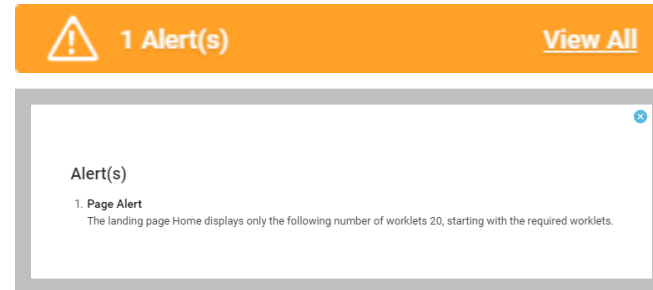
ERROR AND ALERT MESSAGES

Error and alert messages display in red and can be clicked on to view error explanations. They typically identify a specific field or fields where information is missing, entered incorrectly, or is in conflict with a rule established by your organization.

Errors prevent you from completing a task until the error is fixed.

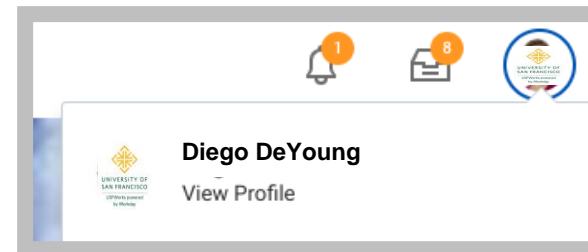


Alerts notify you of potential problems on a page, but do not prevent you from completing the task. Alerts also display the location of missing or problematic information within the task, report, or business process.



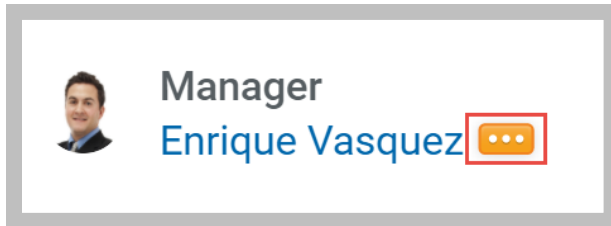
USE RELATED ACTIONS AND THE PROFILE ICON

The Profile icon contains links to the Home page, My Account, and Favorites, to name a few. You can also access Workday Documentation by clicking the Documentation link.

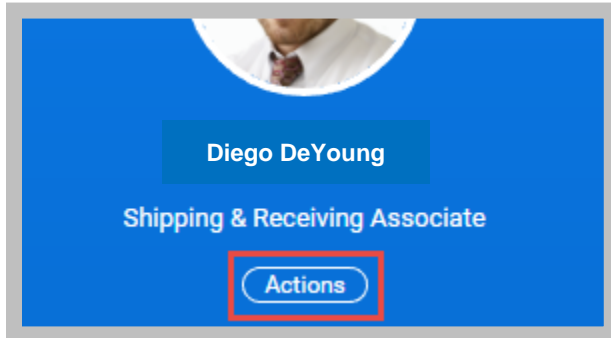


Getting Started: Use Tools and Navigation

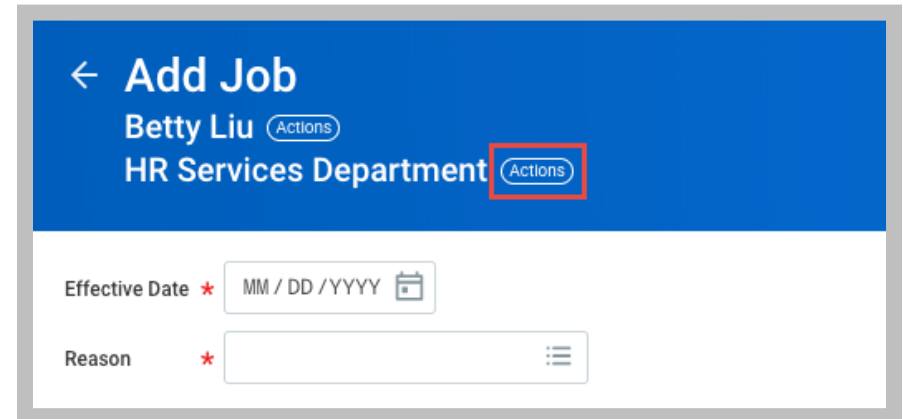
Related Actions display next to an object. They can be used to access other relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (like viewing or changing your benefits). In Workday, there are multiple ways to get to the same tasks, reports, or data. Most of the actions available through Related Actions are also available through applications or the search bar. Three common types of Related Actions can be seen in the following images:



Related Actions may appear when hovering your cursor next to a business object or link.




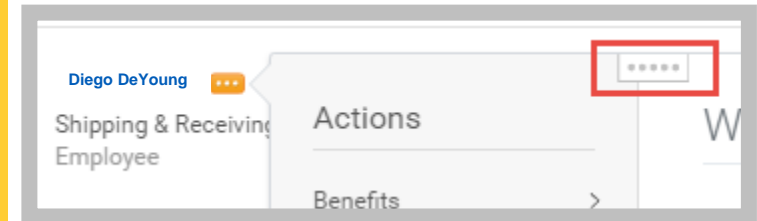
Related Actions in the header of your worker profile is an **Actions** button that serves the same function.



Similarly, you can find Related Actions while viewing tasks and reports in the header.

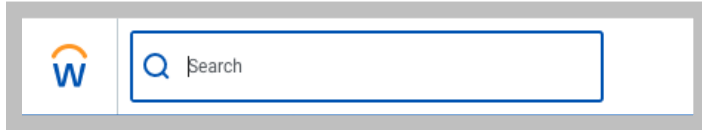


Note: As an option, you can detach the menu from the Related Actions icon by clicking and dragging the icon  at the top of the Available Actions menu.



NAVIGATE USING SEARCH

Workday makes it easy to search for people, tasks, reports, and business data using the Search field.



For example, to find a worker, type their name into the Search field and press Enter. From the search results, click People to filter the results to only display workers in your organization. Search categories are used to filter your search for faster, more accurate results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely not see any results. You can shorten words to find more matches. Use longer search terms to improve accuracy and reduce the time to return results. For example, if you are searching for the Maintain Project Worker Roles task, the search string “main pro work” returns more relevant results than the search string “Maintain Project.”

Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the search field.

In addition to the search field, there are Find pages where you can use filters to narrow down your results. For example, you can use the Find Workers report to search for employees and other workers by city, skillset, cost center, and so on

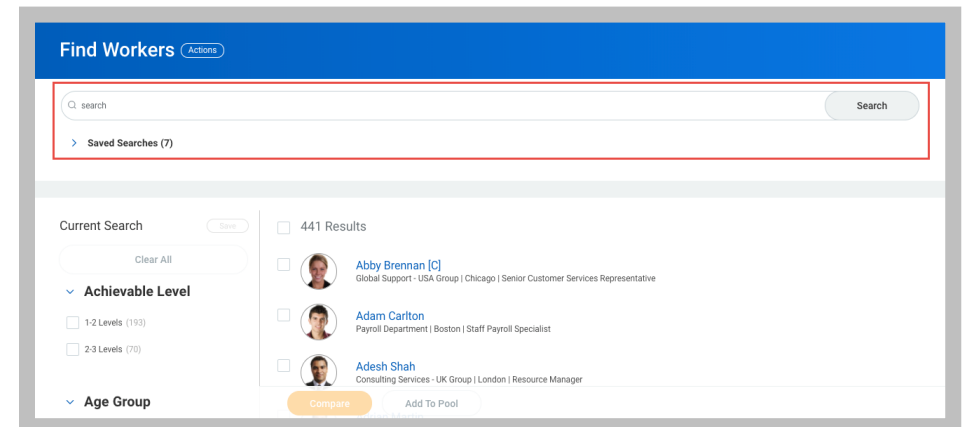
On search report pages (or reports that likely start with “Find,” i.e. the Find Workers report), you can use the faceted search box.

You can customize your faceted search in a variety of ways, including:

- Boolean search – (marketing OR branding) AND manager
- Phrase search – “marketing manager”
- Exact Match – specificmail@workday.com

You can then save these faceted searches for later use.

When the search results provide what you’re looking for, you can either initiate an action using the object’s Related Actions or click the link to see more information.



MOBILE (COMING FEBRUARY 2019)


NAVIGATE WORKDAY



Note: The mobile user experience in Workday uses the same link as the desktop and closely mirrors the desktop user experience. The design of the mobile experience will differ, due to responsive design. This change does not impact the mobile app experience.

IPHONE/IPAD

From the Home page, you can easily get to important tasks and announcements. Your frequently used applications will update automatically, based on use. Tapping View Apps will display the entire list.

Tapping the profile icon  in the top right corner gives you access to the My Account menu.

