

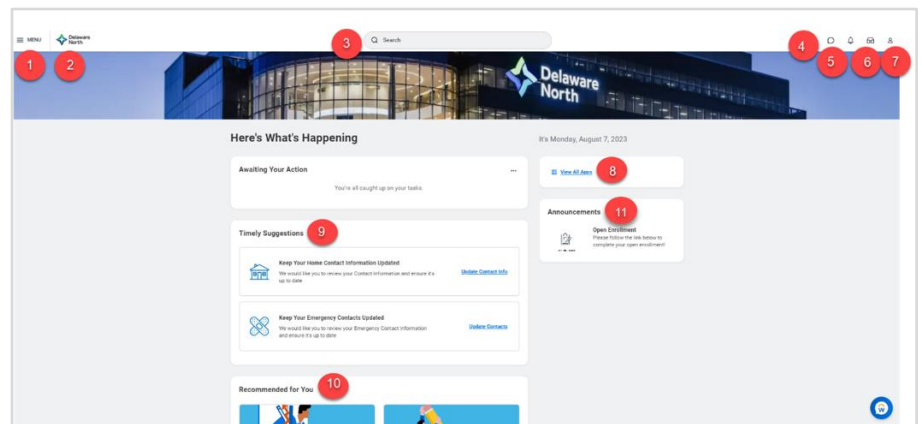
# Navigate Workday

Welcome to Workday!

## Home Page Navigation

From the Home page:

1. **Menu** displays your Apps and Shortcuts at a glance.
2. Click on the Company logo in the top left corner of the screen at any time to return to the **Home page**.
3. Use the **Search** bar to initiate processes or view reports.
4. Access **Workday Assistant**- a conversational chatbot that helps workers to quickly complete actions and retrieve information in Workday. Workday Assistant helps with navigation, finding information, and getting things done.
5. Access your **Notifications** by clicking the bell icon in the top right corner. Notifications are messages for your information only and do not *require* action in order to move the process forward.
6. Access your **Inbox** to view any outstanding Tasks that require you to take action.
7. Click on your photo (or the cloud icon) and click **View Profile** to see your personal and professional data.
8. Click on **View All Apps** to access any of the *Applications* to initiate related processes and view reports.
9. **Timely Suggestions** will populate active and outstanding tasks.
10. **Recommended For You** provides browsable content based on role, recent activity and more.
11. **Announcements** will keep you informed with announcements from the organization.

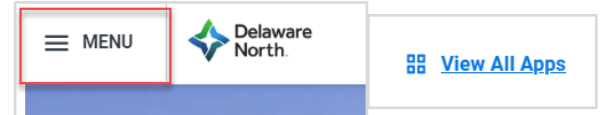


## Configure Applications and Menu

1. Navigate to the **Home Page** area at any time by clicking the Company logo in the top left-hand corner of the screen. You may also return to the **Home Page** by selecting the person icon in the top right corner and then select **Home**.

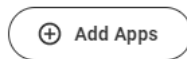


2. Select **View All Apps** on the Home Page Screen. You can also select the **Menu** drop down in the top lefthand corner to view the applications and shortcuts available. Both methods will populate the same information.

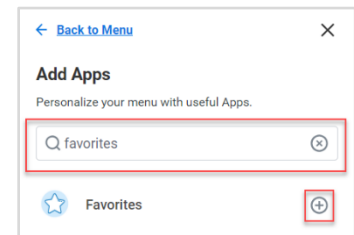


3. Workday lists your Menu selections under the **Apps** tab and the **Shortcuts** tab. Applications consist of *Dashboards and Worklets* you have access to based on your security. They also assist with reducing clicks to access tasks and reports.

### a. Add Apps



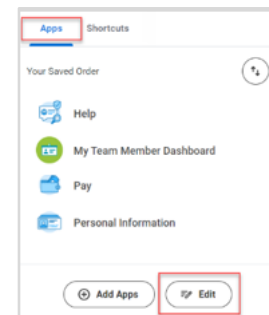
Select to add more Applications to your dropdown menu. Workday will prompt you to enter the **App name** in the search bar. You can view the apps that populate and select **the + button** next to the App. You will receive an alert in the Menu box that the application has been added to your Menu.



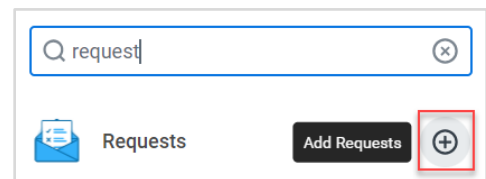
Note: There is a **max of 20 Apps** that can be displayed in the Menu dropdown at a time.

### b. Edit

Workday allows you to **Edit** the Apps you have in your Menu and rearrange their order. Select **Edit** to view actions available. **Optional Apps** are allowed to be removed. **Delivered Apps** cannot be removed. You can drag and drop the Apps in your order preference. Once you have edited appropriately, select **Save Changes** to apply the new changes. You may select **Discard** at any time to remove the changes.



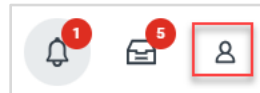
Note: Add the **Requests** app to your saved applications to easily Create and View Requests.



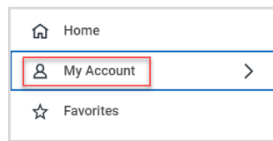
## Workday Settings

From the Home page:

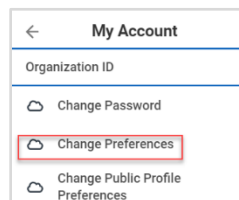
1. To access your Account settings, click the profile icon.



2. Click **My Account**.



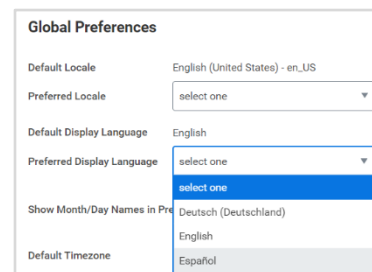
3. Select **Change Preferences**.



4. Make edits to the Display Language if necessary.

5. Scroll down to make edits to your Notifications.

6. Click **OK** to save your changes.

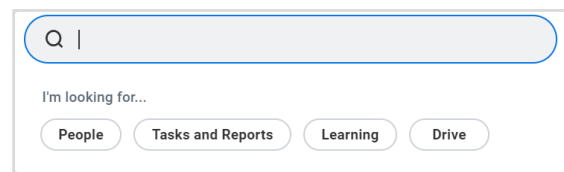


## Search Bar

Note: You can search for various objects in Workday, including specific tasks, workers, invoices, and reports.

Workday search:

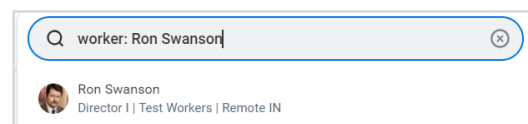
- Delivers search results sorted by relevance
- Processes each term (or character) string separately



You can search with questions, keywords, or prefixes.

Prefixes can be used to refine your search results.

- Enter **?** in the Search Bar to discover better ways to search.



## Worker Profile Page

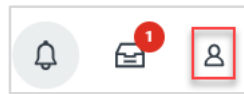
1. Navigate to your Worker Profile page by clicking your photo (or the cloud icon) in the top right corner > **View Profile**.
2. Click on the different pages on the left sidebar. Then click on the tabs along the top to view your personal and professional data.

## Worker Documents

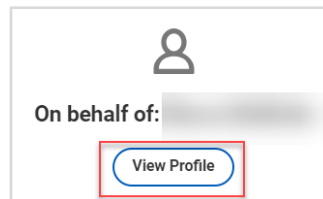
Note: Team Members will now see their employee file. All documents after the New Hire Portal will live in this folder.

From the Home page:

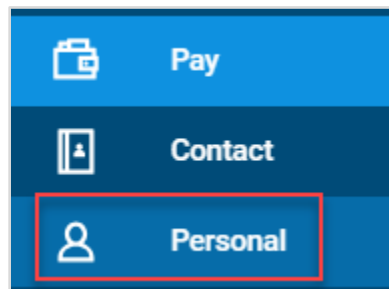
1. Click on your Worker profile icon.



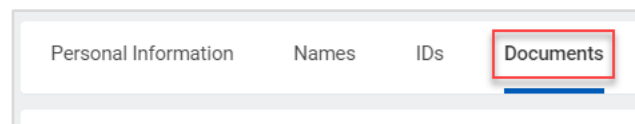
2. Click **View Profile**.



3. Select the **Personal** tab.



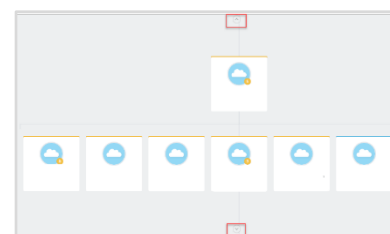
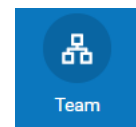
4. Select **Documents** at the top of the screen.



5. View your Documents.

## View Your Org Chart

1. From your Worker Profile page, click the **Team** icon under your photo (or the cloud icon).
2. Scroll up and down to view the Organization Hierarchy. Click on any person to view their worker profile.



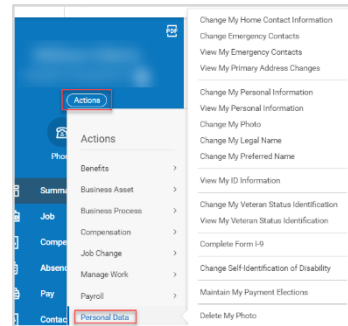
## Related Actions

Related actions in Workday allow you to access tasks and reports directly from a worker, organization, position, etc.

Any place in Workday where you see either of these icons, you can view related actions:





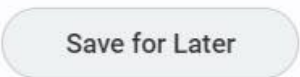
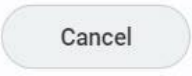


For example, click on the Actions icon on your Worker Profile page.



## Additional Navigation

### Common Icons

	When completing Processes and Tasks, click the <b>Pencil</b> icon to edit fields in the section.  <b>Note:</b> Just because the Pencil icon is available does not mean that you must make edits. Some fields may pre-populate depending on the task and the information Workday automatically pulls in.
	Click the <b>Undo</b> icon to undo any changes made in the section.
	Click the <b>Checkmark</b> icon to save changes in the section.
	Click <b>Submit</b> or <b>OK</b> to complete the changes on the page.
	Click the <b>Save for Later</b> icon to save the task or process in your Inbox to complete later.
	Click <b>Cancel</b> to exit the current page. If you are initiating a process, it will be canceled. If you are completing a task in your Inbox, it will exit the current page, but the item will remain in your Inbox until you complete. Changes will be discarded.



Click on the **Excel** icon to export any report.



Click on the **PDF** icon to view a printable version of any report.

## Favorites

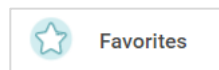
Note: Access your favorite processes and reports in the Favorites application.

From the Home page:

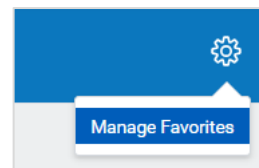
1. Click **View All Apps**.



2. Click on the **Favorites** application. (Note: If Favorites Application not in Menu, add by selecting **Add Apps** and searching for **Favorites**.)



3. To add or remove favorites, click the **Gear Icon** and then click **Manage Favorites**.



4. Search for your **Favorite Tasks/Reports** or **Custom Reports** (ignore the **Business Object** field.) Click **OK**.
5. Navigate back to your Home page and click on the Favorites application to view the changes.

## Errors and Alerts

Errors and Alerts will appear during tasks and processes if data needs to be reviewed or corrected before submitting. Click on the Error or Alert to view the specific message.

- **Errors** indicate data needs to be reviewed and corrected before submitting.



- **Alerts** indicate data should be reviewed but the form can be submitted without correcting.

