

Navigate the Home Page..... 2

Configure Applications 2

Application Layout 3

Error and Alert Messages 3

Related Actions and the Profile Menu..... 4

Navigate Using Search 5

 Exact Match 6

 Partial Search 6

 Prefixes 6

 Find Pages..... 6

 Change Your Account Settings..... 7

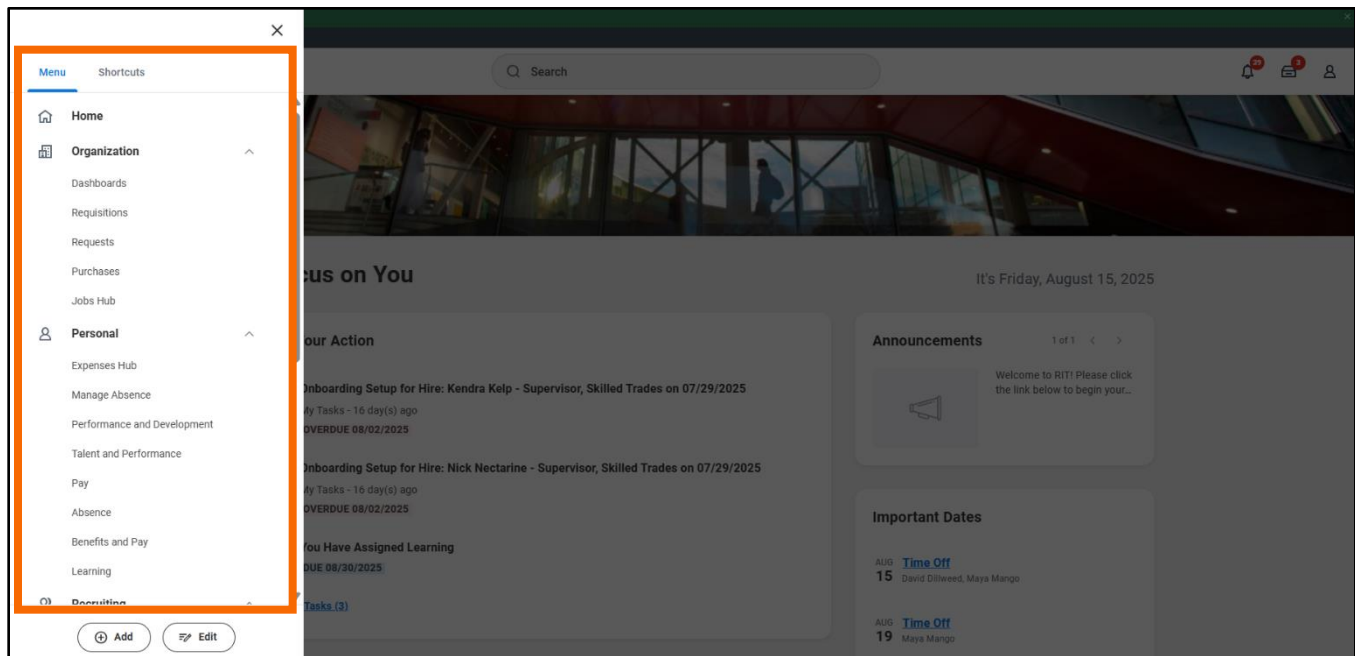
Mobile 7

 Navigate Workday..... 7

 Home Page and Settings 7

Navigate the Home Page

The Workday Home page has a link labeled View All Apps that displays applications and shortcuts in the Global Navigation Menu, providing access to tasks and reports

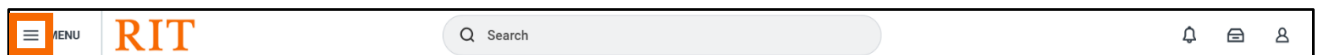


Note: You can also access applications and shortcuts by selecting the Global Navigation Menu icon at the top left of the Home page.

Configure Applications

You can sort, add, remove, and rearrange applications on your Home page.

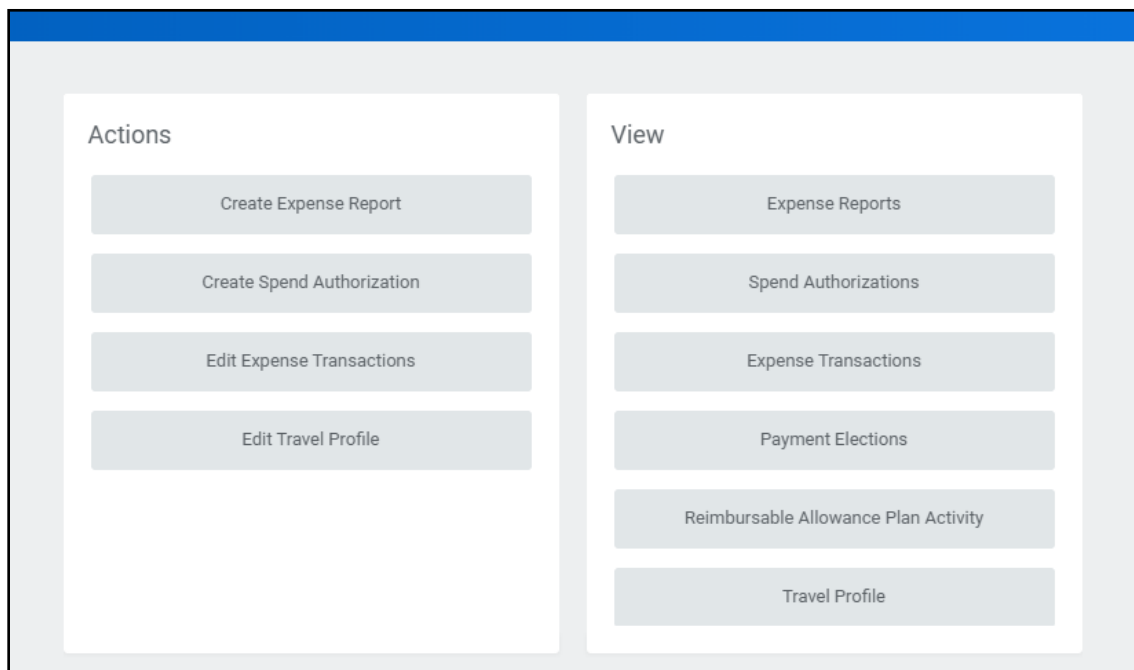
1. From the homepage, select the navigation **Menu** at the top left corner of the toolbar.



2. Select the **Sort** icon to sort your applications by Your Saved Order, Recently Used, or Frequently Used.
3. Select the **Add Apps** icon to search for and add an application.
4. Select the **Edit** icon to edit the list of existing applications.
5. In the **Edit Apps** menu, select the **Remove** icon to remove an application.
6. Select the **Move Buttons** icon to reorder the application.
7. Select **Save Changes**.

Application Layout

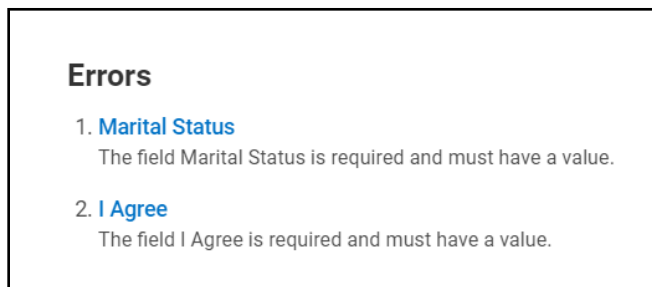
Generally, applications contain Actions and View sections. Buttons in the Actions section link to task you can perform. Buttons in the View section link to reports you can view as shown in the example image below.



Error and Alert Messages

Error and alert messages typically identify specific fields where information is missing, entered incorrectly, or in conflict with a rule established by your organization. Select the notification to view the error details.

Errors are displayed in red and note the number of identified errors as shown in the example images below. You cannot complete a task until you correct all errors.



Alerts display in orange and note the number of alerts as shown in the example images below. Alerts notify you of potential problems on a page, but do not prevent you from completing the task. Select the alert notification to view the location of missing or problematic information within the task, report, or business process.



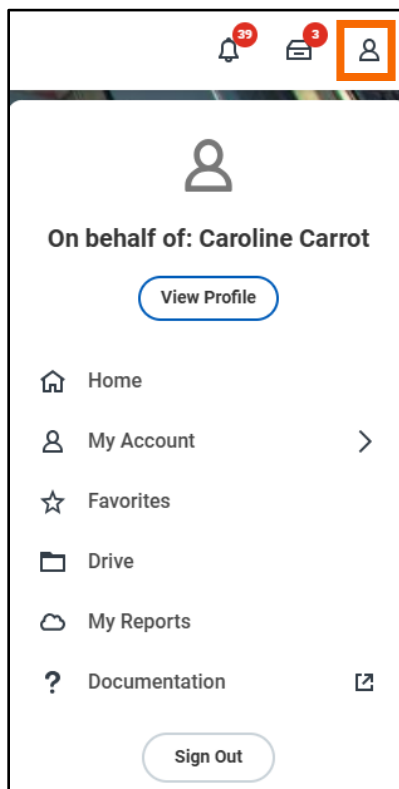
Alert

1. [Report/Task Permissions \(Row 1\)](#)

Activate your security policy changes using the Activate Pending Security Policy Changes task, and update the security evaluation moment, which is currently set to 08/16/2023, 10:15:09.089 AM.

Related Actions and the Profile Menu

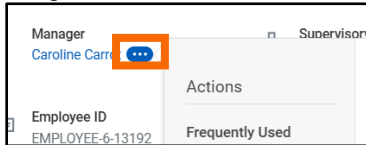
The Profile menu contains links to the Home page, My Account, and Favorites, among others. You can also access Workday documentation by selecting the Documentation link. You can open the Profile menu by selecting your Profile photo as shown in the example below.



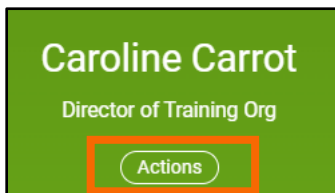
Related Actions display next to an object. You can use them to access relevant actions. For example, the Related Actions icon next to your name accesses tasks, reports, and data related to your worker record (e.g., viewing or changing your benefits). In Workday, there are multiple ways to navigate the same task, report, or data. For example, most actions available through Related Actions are also available through applications or the Search box.

The following are three common types of Related Actions:

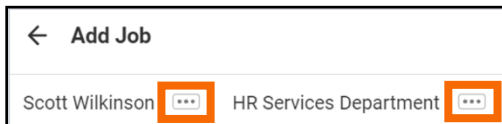
- Related Actions may appear when hovering your cursor next to a business object or link as shown in the image below.



- In your worker profile header, you can access your Related Actions from the **Actions** button under your name as shown in the example below.



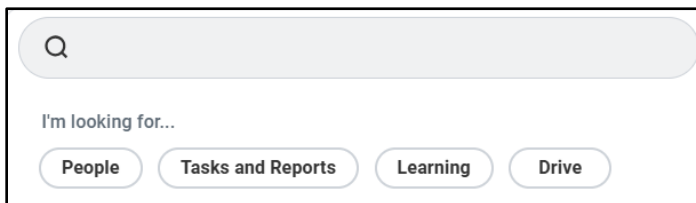
- Similarly, you can find Related Actions in task and report header as shown in the following example:



Note: You can detach the Related Actions menu from the icon by selecting and dragging the Drag icon at the top of the menu.

Navigate Using Search

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



- For this example, to find an employee, locate the **Search** bar at the top of your homepage.
- Select **People** to filter the results to only displays employees in your organization.
- Enter their name into Search bar and then select **Search** bar icon or press the **Enter** key.



Note: You can also use search categories to further filter your search results. Recent searches display below the search box. This display makes it easy to navigate to recently used tasks, reports, or business data.

Exact Match

It is important to keep in mind that searches find exact matches. If you misspell the search text, it is likely that Workday will display no results. Workday search also favors complete word matches over partial word matches. This search method ensures search results match the term you enter more closely. If you search using partial names or terms, the results may not display partial matches, depending on data volume. For example, if you search for “Alex,” the results may not display the name “Alexander.”

Partial Search

Though complete word matches are favorable, you can also use partial search to find what you are looking for. For example, if you are searching for the Maintain Candidate List Assignment task, you can use the search string “main can lis.” Though this method is still effective, it may not be the best practice for all searches that return multiple results.

Prefixes

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 find a list of all search prefixes available to you, enter a question mark (?) in the Search box.

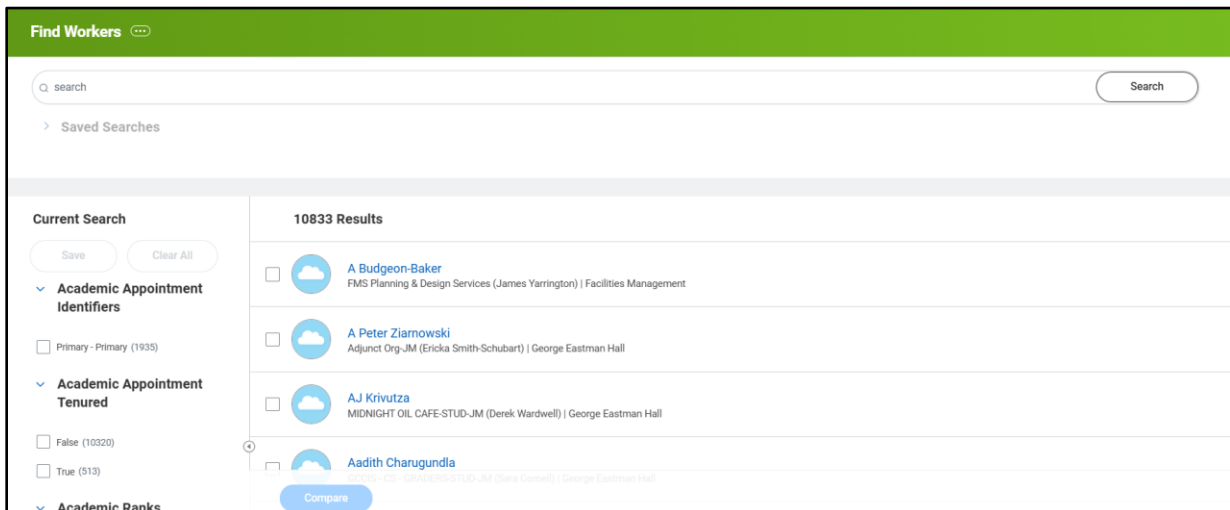
Find Pages

In addition to the global Search box, you can use Find pages to filter your results in more detail. For example, use the Find Workers report to search for employees by location, skillset, cost center, and other categories. You can also use the faceted search field to tailor your search results using different types of search methods like:

- Boolean search – (sales || marketing) && manager
- Phrase search – “marketing manager”
- Exact Match – specificmail@workday.com

You can then save faceted searches for later use.

- From the search results, select a link for more information or initiate an action from the object’s Related Actions.



Change Your Account Settings

1. From the homepage, select employee profile icon in the upper right corner and select **My Account**.
2. From here, you can access your organization ID, change your password, change your public profile preferences, manage your password challenge questions, and view sign-in history.

If you are a delegate, select **Switch Account** to switch between accounts.

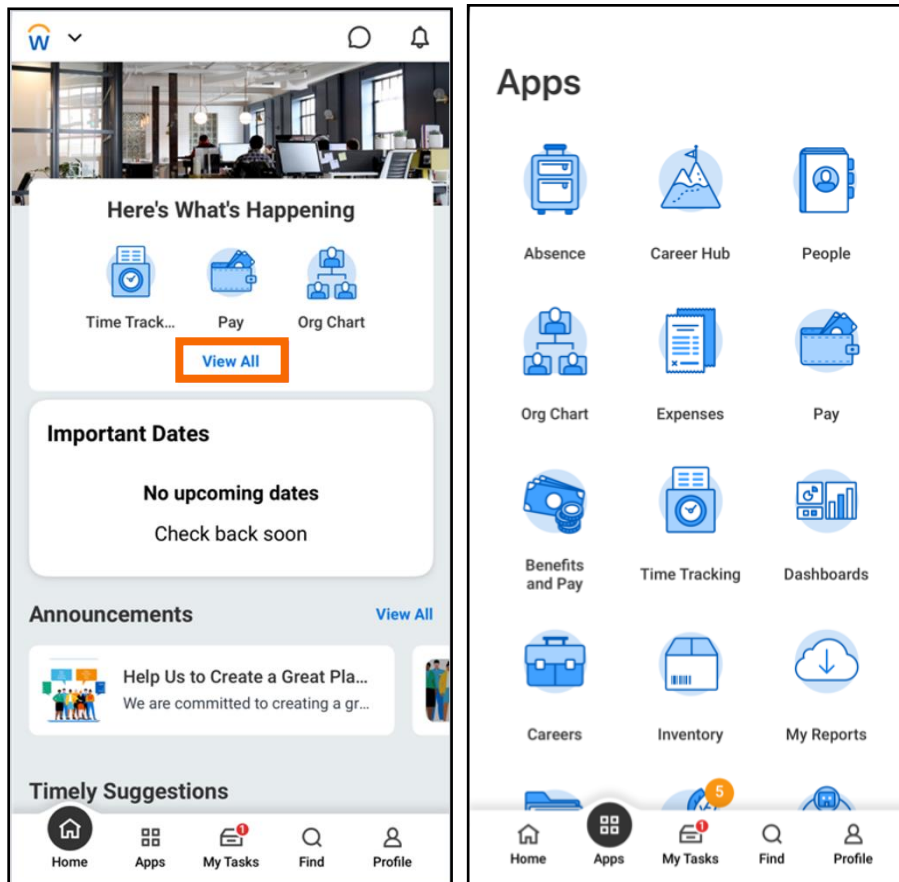
Mobile

Navigate Workday

- Workday mobile user experience uses the same link as the desktop and closely mirrors the desktop user experience. However, the design of the mobile experience will differ due to responsive design. These changes do not impact mobile application experience.

Home Page and Settings

1. From the home page, you can view announcements and navigate important tasks. Your frequently used applications update automatically based on use. Select the **View All** to display the entire list of applications as shown in the following examples.



2. In the top-left corner, select the RIT icon to access the Settings menu. From here you can:
- Access global preferences settings by selecting Global Preferences. You can change your preferred location, preferred language, and more.
 - Change your password by selecting Login.
 - Update your push notification settings by selecting Notifications.
 - Manage your permissions by selecting Privacy Permissions. You can enable or disable diagnostics collection and view various device settings.
 - View the Workday privacy statement and related information by selecting Privacy Statement.
 - View terms and conditions information by selecting Terms and Conditions.
 - Manage general settings by selecting Internal Developer Tools. You can enter your organization's tenant and Workday web address link. You can also access other features such as brightness control, presenter mode, and more.

