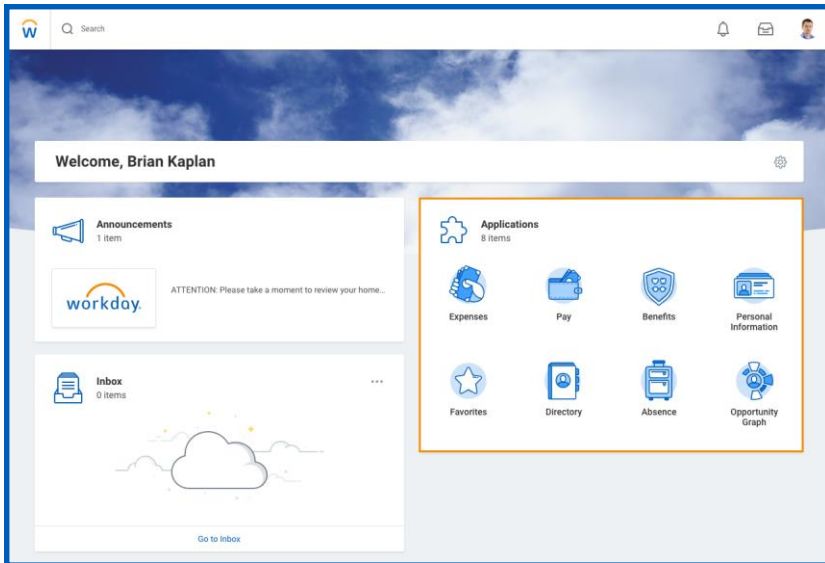


## NAVIGATE THE HOME PAGE



**Note:** Worklets on the Home page are referred to as applications.

The Workday Home page displays applications that provide access to tasks and reports. The Home page is highly configurable, so your organization may display different applications.










## CONFIGURE THE HOMEPAGE

If your organization allows, you can add, remove, and rearrange applications on your Home page.

From your Home page:

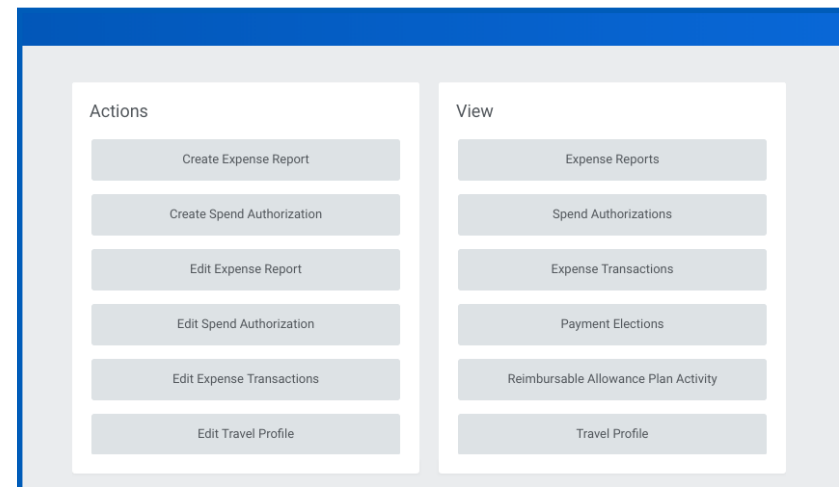
1. Click the **Configure Applications**  icon in the upper-right

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

## APPLICATION LAYOUT

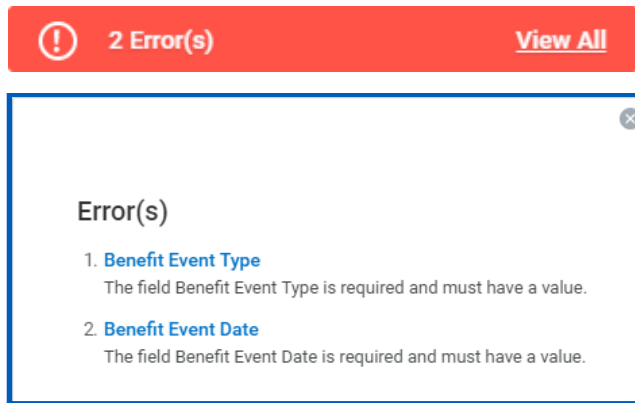
A common layout for applications includes Actions and View sections. Buttons under the Actions section link to tasks you can perform. Buttons under the View section link to reports you can view.



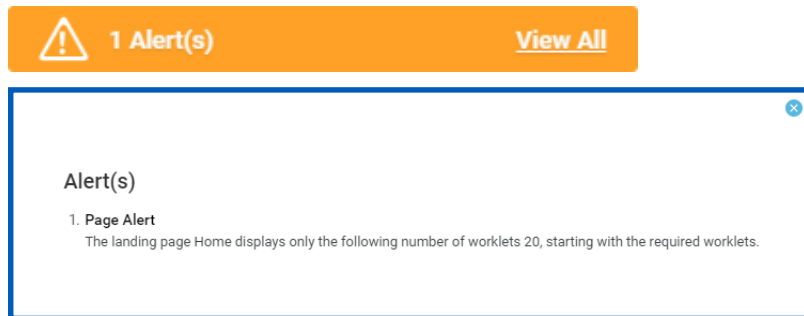
## ERROR AND ALERT MESSAGES

Error and alert messages display in red and orange. They typically identify specific fields where information is missing, entered incorrectly, or in conflict with a rule established by your organization. Click the message to view the error details.

Errors display in red. You cannot complete a task until you correct all errors.

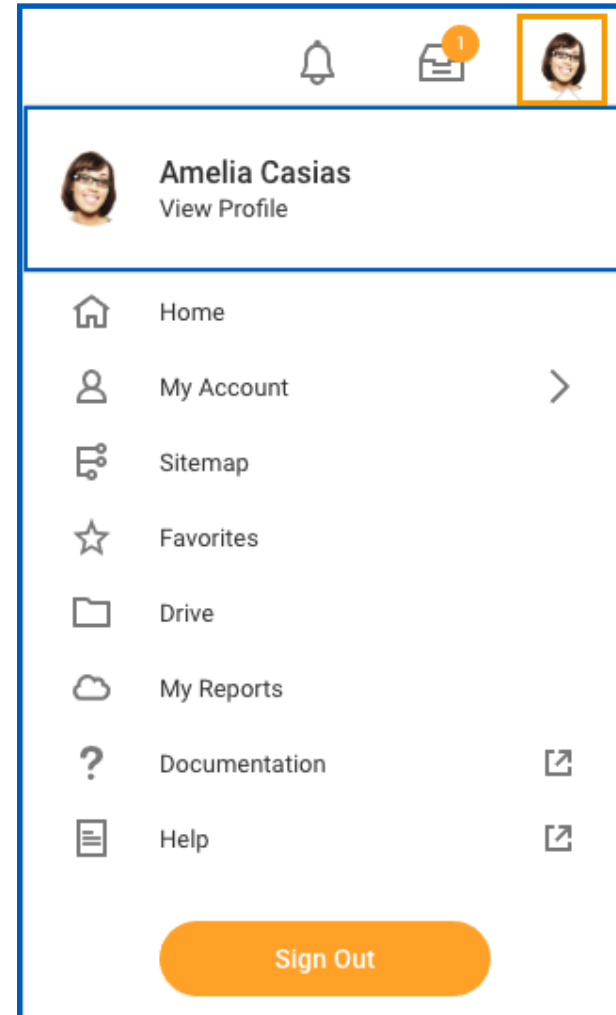


Alerts display in orange. They notify you of potential problems on a page, but do not prevent you from completing the task. Click on the alert message to view the location of missing or problematic information within the task, report, or business process.



## RELATED ACTIONS AND THE PROFILE MENU

The Profile menu 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:

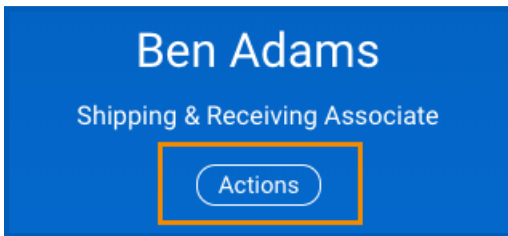
## Use Tools and Navigation

## Employee

Related Actions display next to an object and can be used to access relevant actions. For example, the Related Actions 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 to the same task, report, or data. For example, most actions available through Related Actions are also available through applications or the search bar. The following images show three common types of Related Actions:



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




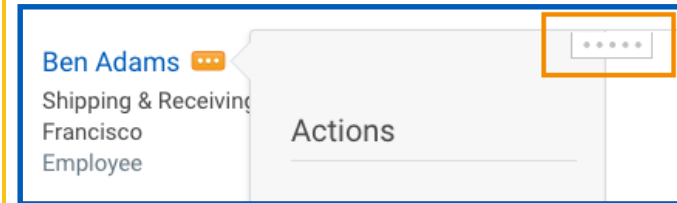
In your worker profile header, you can access your Related Actions from the Actions button under your name.



Similarly, you can find Related Actions in task and report headers.



Note: You can detach the Related Actions menu from the icon by clicking 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 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 results for more specific results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely see no results. As you become more familiar with certain tasks and reports in the Workday system, you can use partial search to quickly 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".

Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a

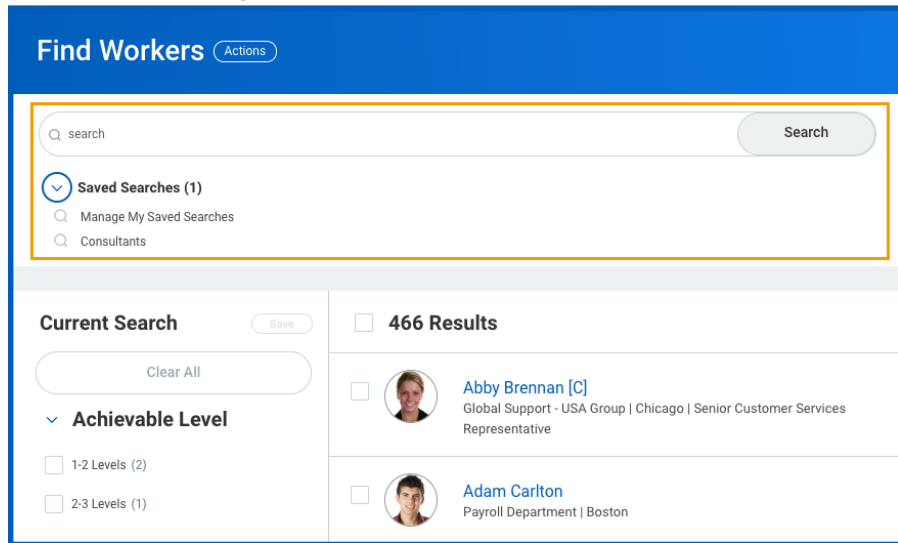
colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the search field.

In addition to the global search field, you can use Find pages to filter your results in more detail. For example, use the Find Workers report to search for employees by city, skillset, cost center, and so on. You can also use the faceted search box 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

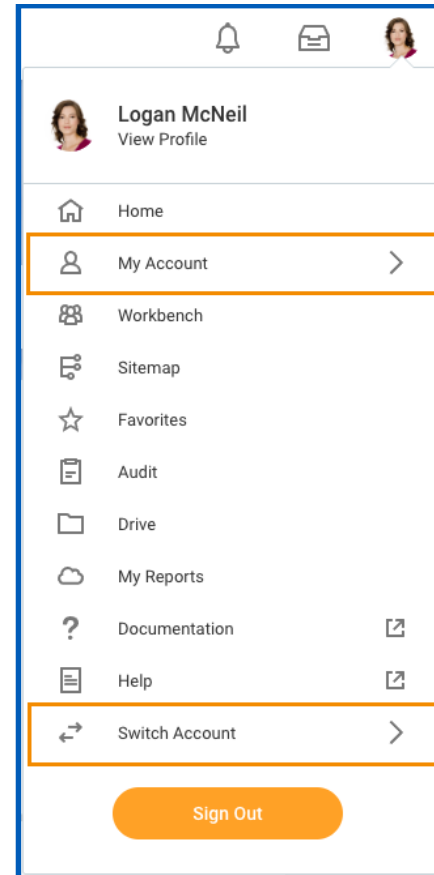
You can then save faceted searches for later use.

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



## CHANGE YOUR ACCOUNT SETTINGS

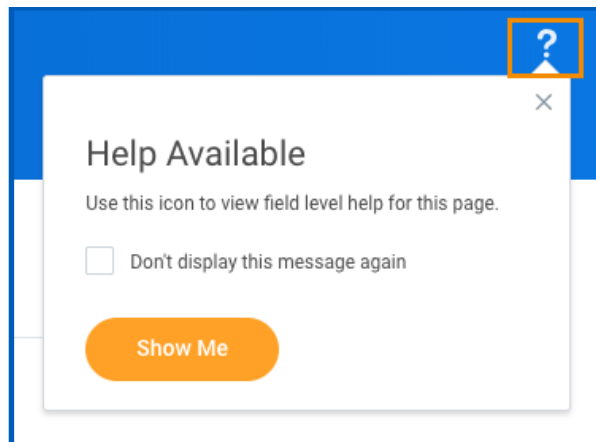
You can easily change your account settings in Workday. Click your Profile icon in the top-right corner of your Home page, then select My Account. From here, you can access your organization ID, change your password, and manage your account preferences. You can also edit your password challenge questions, survey your trusted devices, and view sign-in history. If you are a delegate, click Switch Account to switch between accounts.



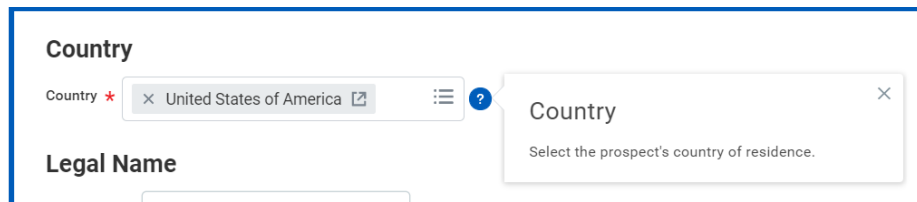
## GUIDED TOURS

Product tours provide contextual and informative text to guide you through a task with field-level tool tips. This tenanted text is only available for certain tasks and may vary depending on your organization's configuration.

To activate a product tour, click the question mark in the top-right corner.



Question marks will appear next to fields configured with help text to clarify the type of data required.



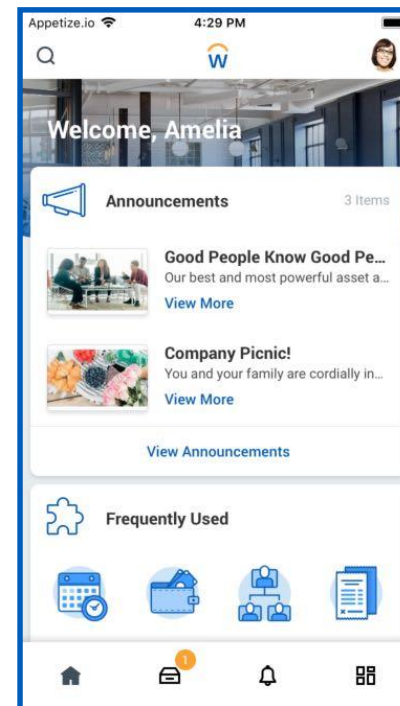
## MOBILE

### NAVIGATE WORKDAY

The Workday mobile user experience now 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 the mobile app experience.

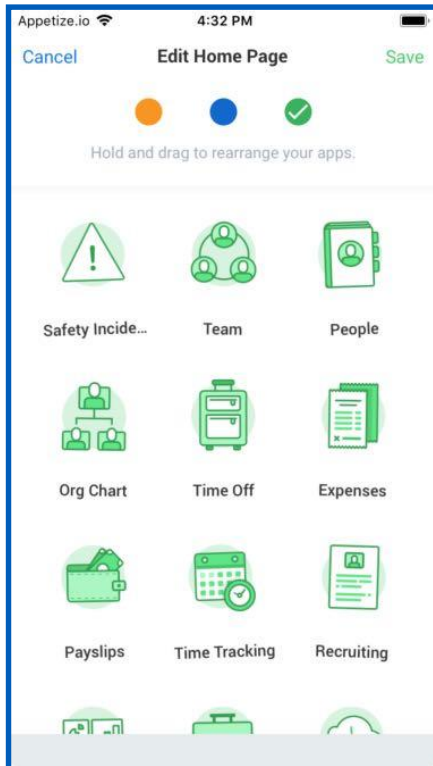
### IPHONE/IPAD


From the Workday Home page, you can view announcements and navigate to important tasks. Your frequently used applications update automatically, based on use. Tap View Apps to display the entire list.





Note: From the Apps menu, you can tap Edit or hold down on an app to change its color or location.



Tap your profile icon  in the top-right corner to access the My Account menu. From here, you can:

- Access general app settings. Tap the **General** tab to enter your organization's tenant and Workday web address link. You can also adjust brightness and manage your notification settings, among other various tasks.
- Change your password by tapping **Login and Security**.

