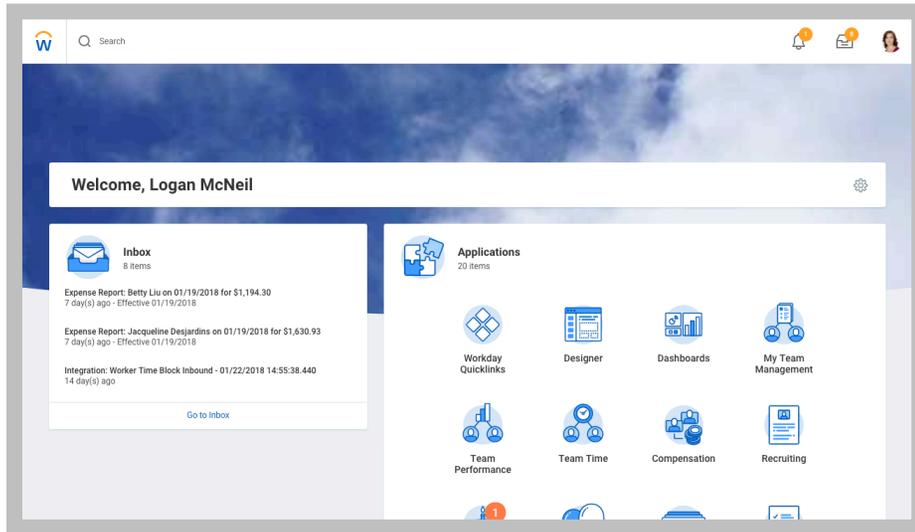## NAVIGATE THE HOME PAGE

In Workday, data can be entered using "tasks" and viewed using "reports." The Workday Home page displays worklets 🖳 that provide access to tasks and reports. Because the Home page is highly configurable, your organization may display different worklets.

CONFIGURE WORKLETS

Additional worklets can be added to your Home page, if allowed by your organization.

From your Home page:

1. Click the **Settings** 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 dashboard.

5. Click the **Move Row Up** arrow ▲ or **Move Row Down** arrow ▼ to reorder the worklets on the page. 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**.

COMMON WORKLET MENU

After selecting a worklet, you may see a page layout similar to the screenshot below:
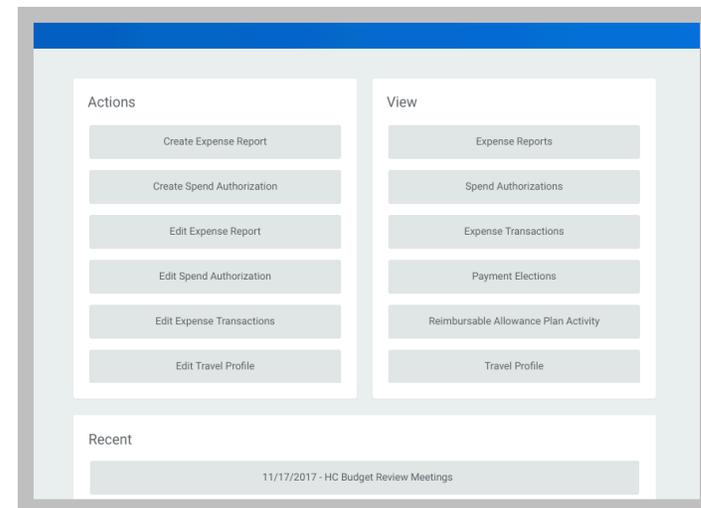
This is a common layout for worklets. There are Actions and View sections containing buttons. Buttons under the Actions section link to tasks you can perform. Buttons under the View section link to reports you can view.

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(s) where information is missing, entered incorrectly, or in conflict with a rule established by your organization.

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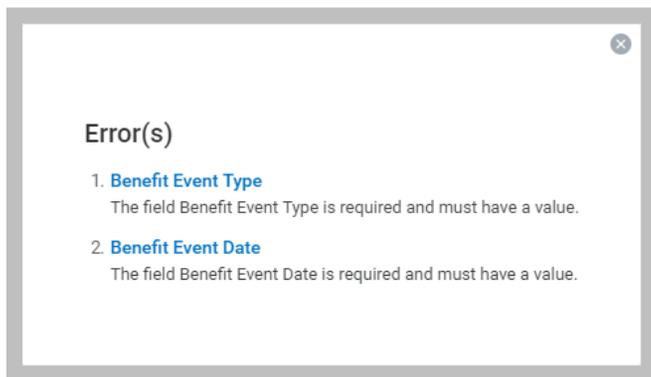

Alerts notify you of potential problems on a page, but do not prevent the task from being completed. Alerts also display the location of missing or problematic information within the task, report, or business process.
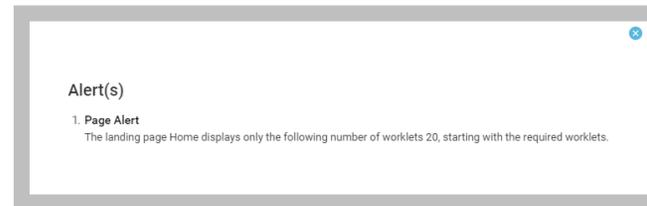

## USE RELATED ACTIONS AND THE PROFILE ICON

The Profile icon contains links to the Home page, My Account, and Favorites, to name a few. Workday Documentation can also be accessed by clicking the Documentation link.
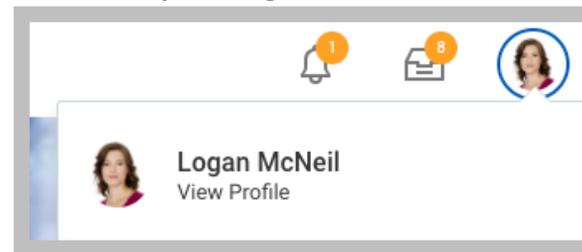
Related Actions display next to an object when they can be used to access other relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (like viewing or changing your benefits). In Workday, there are multiple ways to get to the same tasks, reports, or data. Most of the actions available through Related Actions are also available through worklets or the search bar. Three common types of Related Actions can be seen in the following images:
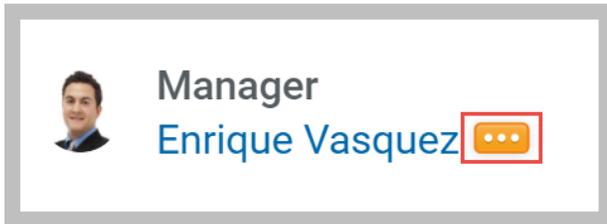
Related Actions may appear when hovering your cursor next to a business object or link.
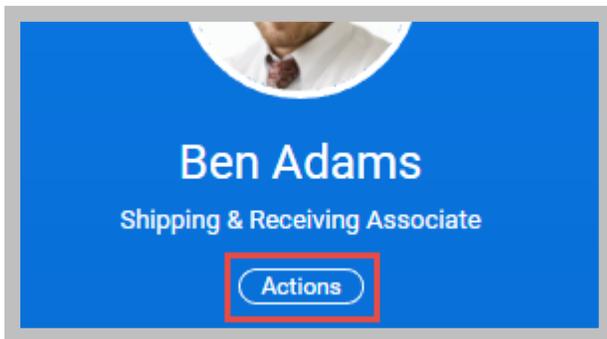
Related Actions in the header of your worker profile is an Actions button that serves the same function.
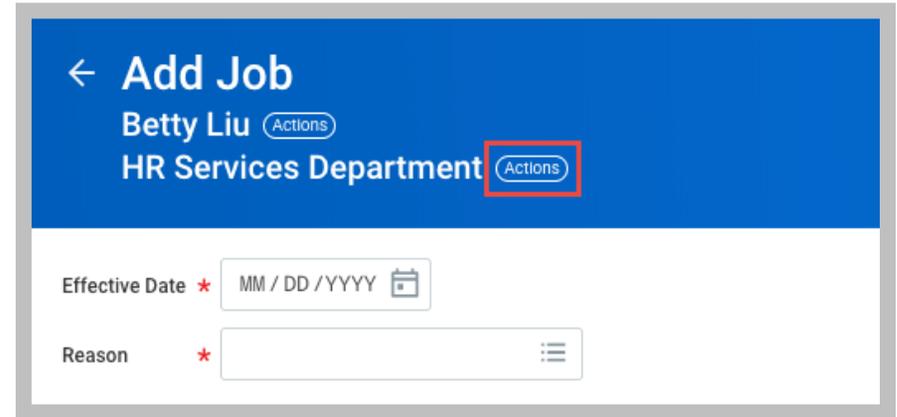
Similarly, you can find Related Actions while viewing tasks and reports in the header.

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.
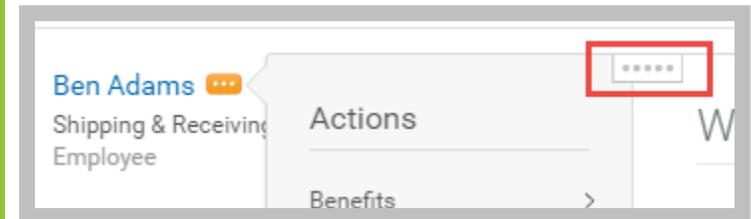
NAVIGATE USING SEARCH

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 the 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 the results. For example, use the Find Workers report to search for employees and other workers by city, skillset, cost center, etc.

On Search Reports pages (reports that likely start with "Find," i.e. "Find Workers report") you can use the faceted search box.
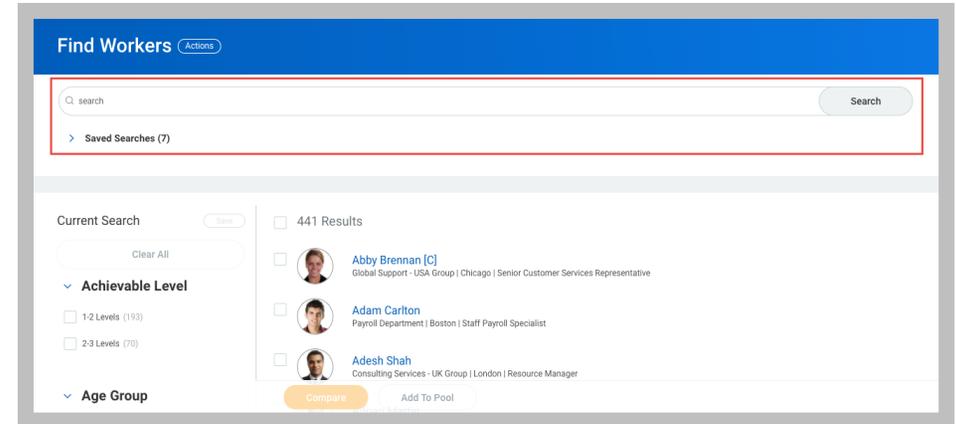
You can customize your faceted search in a variety of ways, including:

- Boolean search – *(marketing OR branding) AND manager*
- Phrase search – *"marketing manager"*
- Exact Match – specificmail@gmail.com

These faceted searches can then be saved 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.

CHANGE YOUR ACCOUNT SETTINGS

You can easily change your account settings in Workday. Click the Profile icon in the top-right corner and then select My Account. From here, you can change your password and account preferences, and manage your account's challenge questions. You can also use this to switch accounts if you are a delegate.
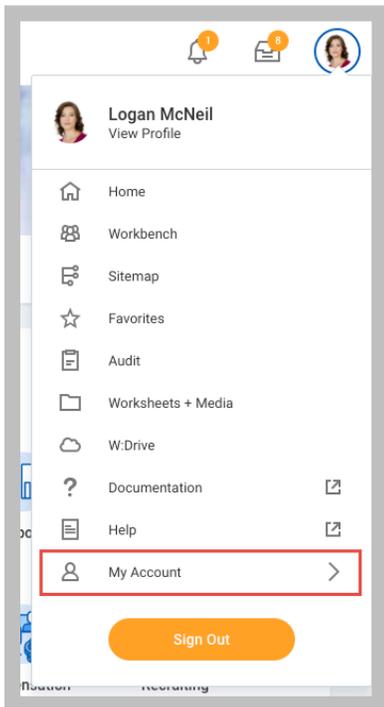
GUIDED TOURS

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.
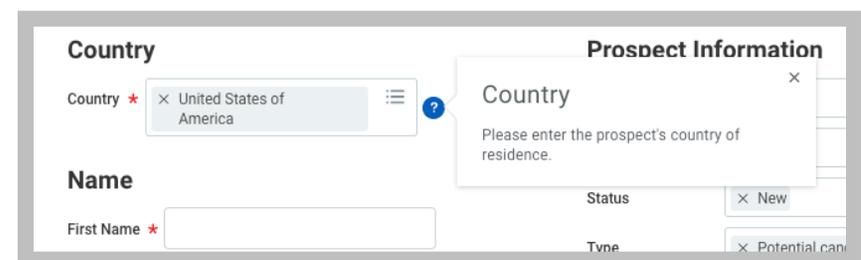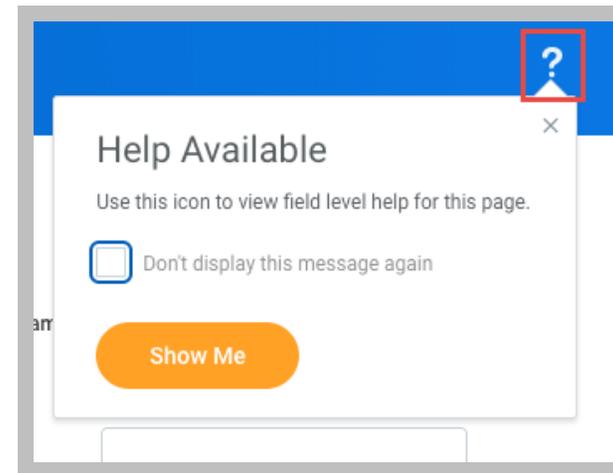
MOBILE

NAVIGATE WORKDAY

Note: Mobile web user experience now uses the same link as the desktop, closely mirroring the desktop user experience. The design of mobile web will differ due to responsive design. This change does not impact the mobile app experience.

IPHONE/IPAD

From the Workday 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.
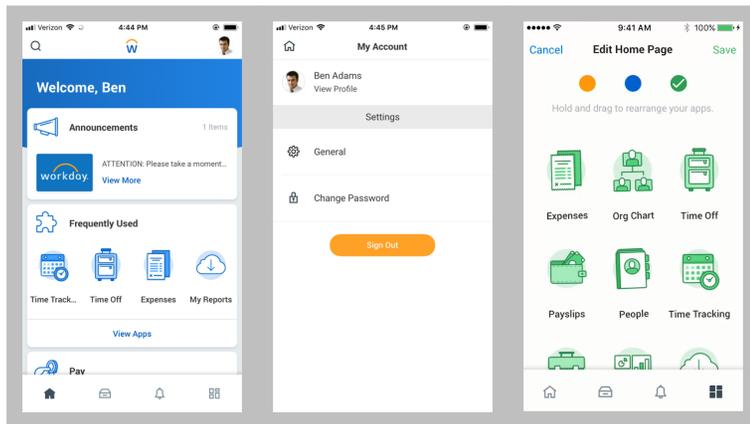
Tapping the profile icon in the top right corner gives you access to the My Account menu. From here, you can:
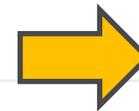
- Use General ⚙ to enter your organization's tenant, Workday web address link, adjust brightness, etc.
- Change Password. 🔓

Note: You can also hold down on an application from the Apps menu to change its color or location.

CHANGING YOUR VIEW/GRID PREFERENCES

If you want to modify your grid preferences within each business process for ease of coding, you can update them by selecting the **View/Edit Grid Preferences button**

Tax	Tax Recoverability	Tax Option	Quantity	Unit Co
Tax Applicability			0	
Tax Code				

Uncheck the items you do not want to see in your view.Click the items individually and drag them to change the order.

Click **Apply.**

Grid view is now *updated* with only selected columns and in your preferred order.