How to Navigate Workday

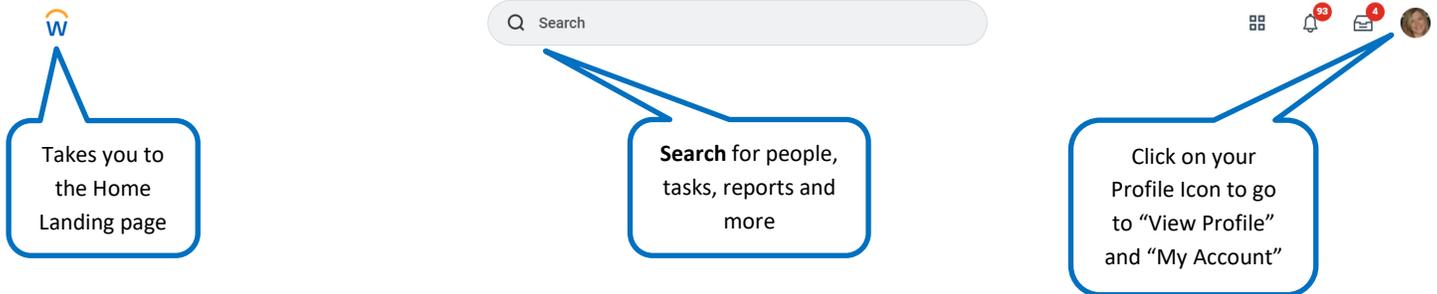## Navigate the Workday Banner

The Workday Banner will always display at the top of your screen and provide quick access to key areas.

Takes you to the Home Landing page

Search for people, tasks, reports and more

Click on your Profile Icon to go to "View Profile" and "My Account"

Navigating the Home Landing Page

The Workday Landing Page displays your top icons, known in Workday as "Applications" or "Worklets". Click on the View all Apps to gain access to tasks that can be performed, things that can be viewed, and links for additional resources.

Your Top Apps

- Time
- Time and Absence
- Absence
- Career

View All Apps
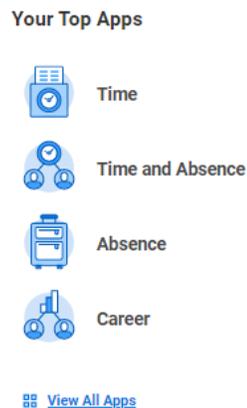
Configuring Your Home Landing Page

Additional Worklets can be added to your Home Landing page to customize your experience.

From your Home page:

1. Click the *Settings* icon
2. *Configure Worklets* will appear
3. Click the *Plus* icon under *Optional Worklets* to add a new worklet
4. Click on the *Prompt* button under the Worklet field and select from the list of existing Worklets
5. Click the Minus icon to remove a worklet from the dashboard
6. Click the Up Arrow or Down Arrow to reorder the Worklets on the page
7. Click *OK* at the bottom of the page to complete the transaction

General Navigation in Workday

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Do not use your browser's back button for navigation in Workday. Use the ***Back, Next***, or ***Cancel*** buttons in Workday.

Using Search

Use the search box to locate people, tasks, reports and views you can access. If you are not sure where to find information in a particular Worklet, type the task name or report you are looking for into the **Search box.**

As you type, Workday begins to filter your request offering several of the most common search results in a drop down menu. Select one of these results, or simply press **Enter** to skip the drop down menu and display the search results in a separate window.

Q	contact

Contact Information - Report

Add Emergency Contact - Report

Change Contact Information - Report

Change Home Contact Information - Task

Change My Emergency Contacts - Task

Change My Home Contact Information - Task

Notifications are updates on actions you've taken

Inbox has items needing your attention and an archive of actions you've taken

Using the Profile Icon

The **Profile** icon contains links to the Home Landing page, your profile, and your Inbox. Access the menu by clicking on your name.

On behalf of: Michael Scott
View Profile

Click on the **Profile Icon** to reveal the drop-down menu

🏠 Home

☆ Favorites

☁ W:Drive

▤ Help ↗

👤 My Account ＞

🕐 Recovery Assistant ＞

Sign Out

Drive provides a links to how-to guides and information about Workday.

Click on **My Account** to update passwords and account preferences

How to Navigate Workday

Using Your In-box

Your In-box includes notifications of tasks, approvals, due dates, etc., that are sent to you by Workday.

From your Home page:

1. Click in the top-right corner.
2. Click *Inbox* to expand your viewable options.
3. Click the *Actions* tab to view your to-dos, tasks, and approvals.
4. Click the *Archive* tab to access the process status of any business process you have been involved in.

Using Notifications

Notifications include updates on actions you have taken, that are sent to you by Workday.

From your Home page:

1. Click in the top-right corner.
2. Click *Notification* to expand your viewable options.
3. Click the *Viewing* tab to view notifications by either "all" or "unread".
4. Click the *Sort By* tab to sort notifications by either "newest" or "oldest" on top.

Set up Account Preferences

You have the ability to change some of your preferences within Workday. For example, you can choose your search parameters and your notification delivery preferences.

From your Home page:

1. Click in the top-right corner
2. Click *My Account* and select *Change Preferences*
3. Change the items listed on the *Change Preferences* page as applicable.
4. Click *OK* at the bottom of the page to complete the transaction.

Using the Actions Button

The *Actions* button displays next to an object when there are actions relevant to the object. For example, the Actions icon under your name accesses tasks and data pertaining to your worker record.

Options beginning with the word "View" are view-only actions.

The *Related Actions* button will also display next to an object when there are actions relevant to the object.

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Understanding Error and Alert Messages

Error and Alert Messages display at the top of the page or in right-hand portion of the page when scrolling down. They typically identify the specific field or fields where information is missing, entered incorrectly, or in conflict with a system rule.

① 1 Error View All	*Errors will not allow you to complete the task until you have fixed the error.*
⚠ 25 Alerts View All	*Alerts notify you of a potential problem on the page, but the task can still be completed.*

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