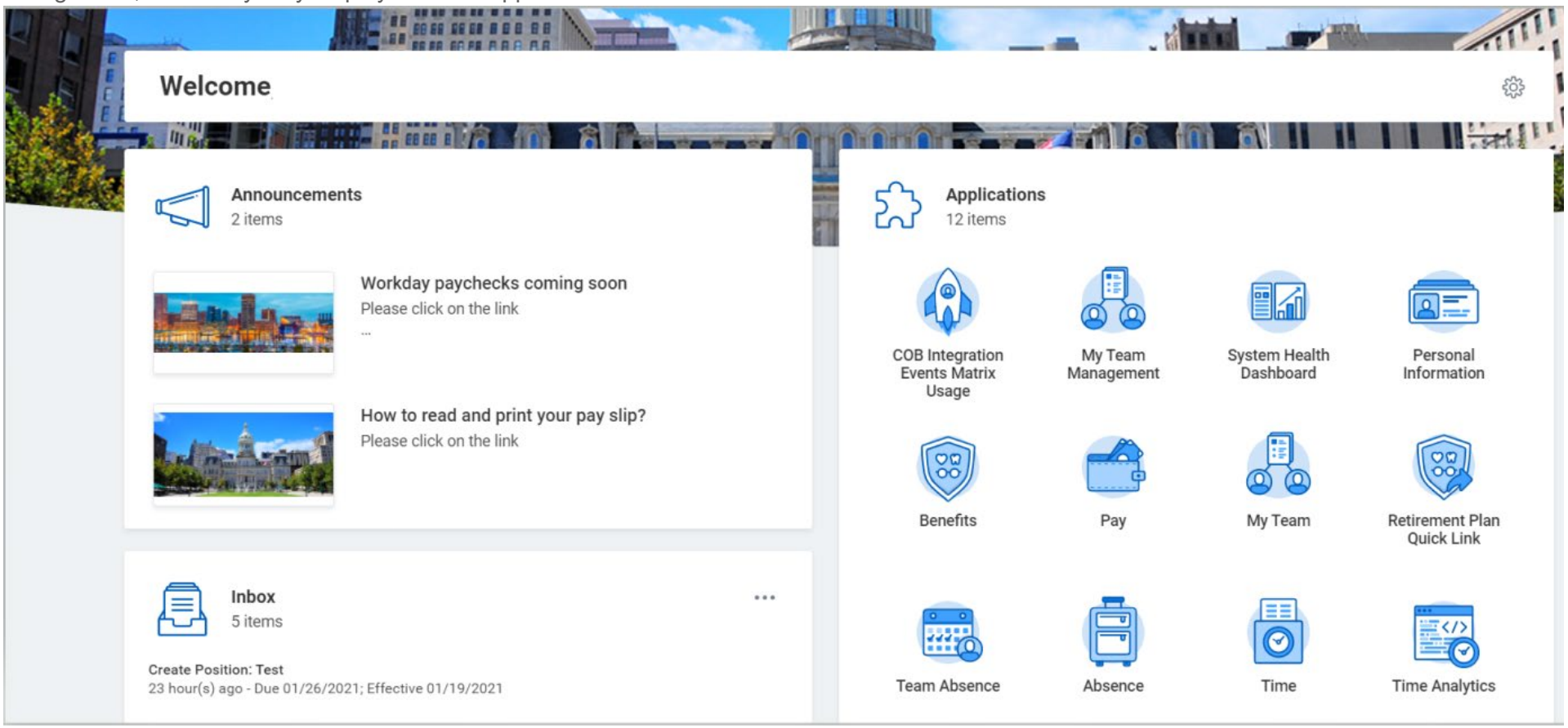
NAVIGATE THE HOME PAGE

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



Your screen shots may vary in color from this document; however, processes are correct as of revision date.
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Note: Worklets on the Home page are referred to as applications.

CONFIGURE THE HOMEPAGE

You can add, remove, and rearrange applications on your Home page if allowed by the City. 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 use to reorder the worklets. To move a worklet to the first or last position, the **Move Row to Top** or **Move Row to Bottom** arrows .
6. Click OK and Done.

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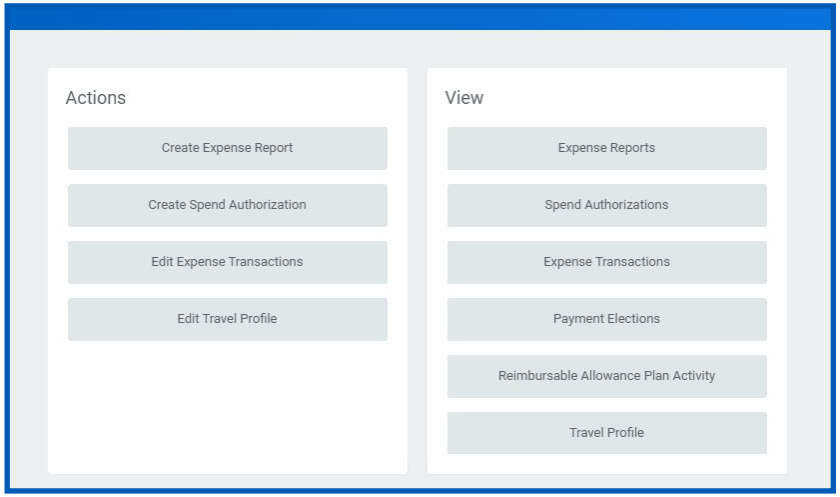
APPLICATION LAYOUT

Applications are most organized into Actions and View sections. Buttons in the Actions section link to tasks you can perform. Buttons in 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 the City. Click the message to view the error details.

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

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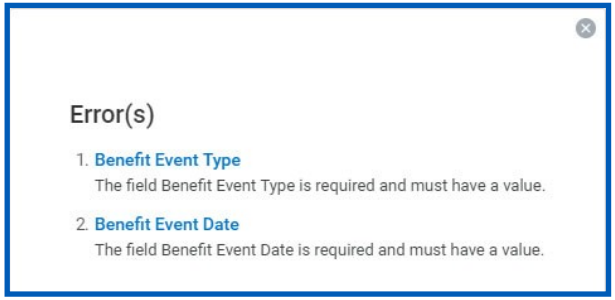
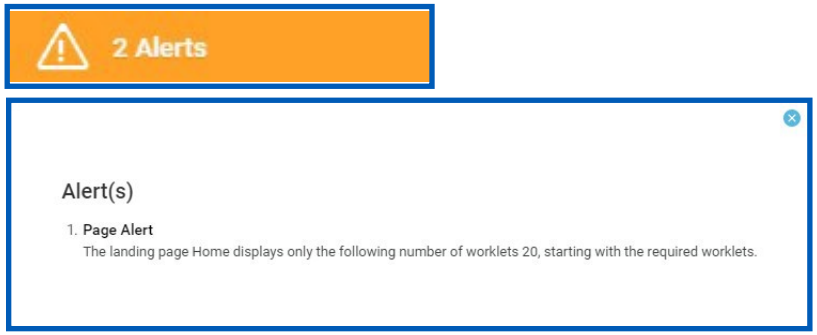


Alerts display in orange. They notify you of potential problems on a page, but do not prevent you from completing the task. Click on the alert message to view the location of missing or problematic information within the task, report, or business process.



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.

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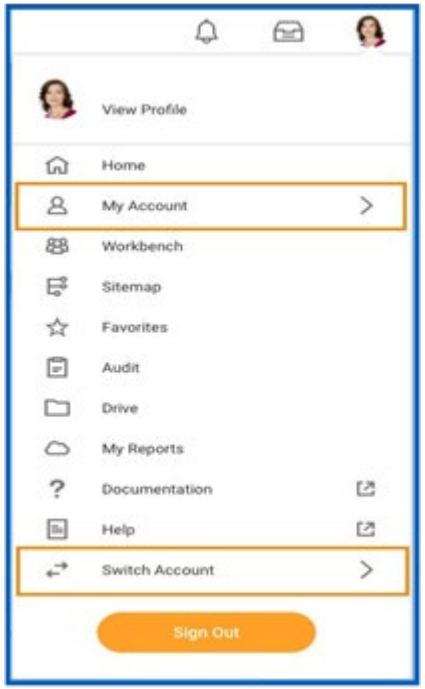
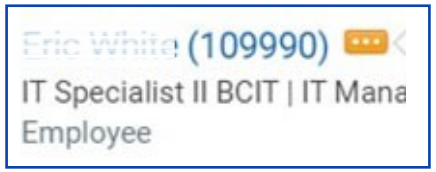


Related Actions display next to an object and can be used to access relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (e.g., viewing or changing your benefits). In Workday, there are multiple ways to navigate to the same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



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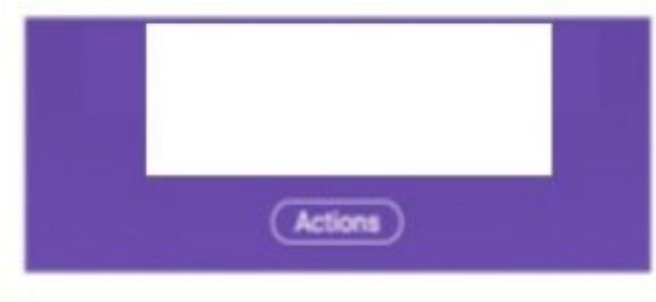
- In your worker profile header, you can access your Related Actions from the Actions button under your name.



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 box.

For example, to find a worker, type their name into the Search box and press **Enter**. From the search results, click **People** to filter the results to only display workers in the City. 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. Workday search also favors complete word matches over partial word matches. This is so that 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

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search for “Alex”, the results may not display the name “Alexander” 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 list”. This method is still effective but may not be a best practice for all searches where there may be multiple results returned.

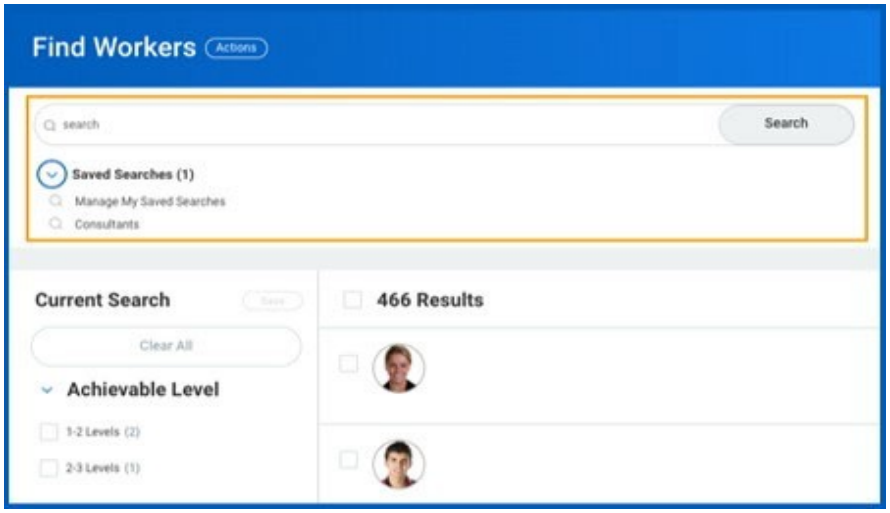
Search prefixes restrict the search results to a Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the Search box.

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 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.



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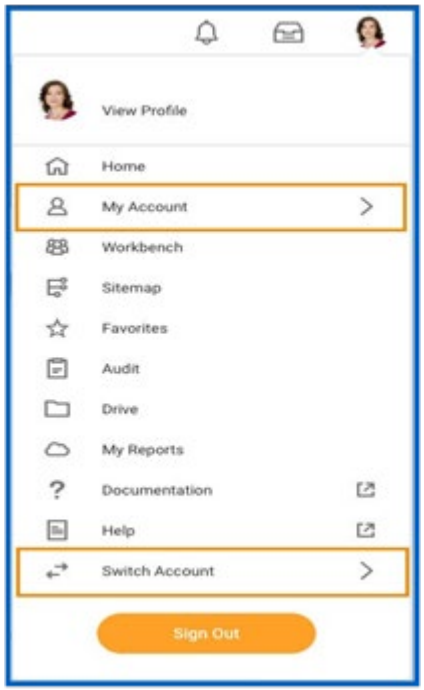
CHANGE YOUR ACCOUNT SETTINGS

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 the City ID, change your password, and manage your account preferences. You can also edit your password challenge questions and view sign-in history.

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



STILL HAVE QUESTIONS ABOUT WORKDAY

For additional support and questions about Workday please contact your agency HR Practitioner.

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