

Getting Started: Tools and Navigation

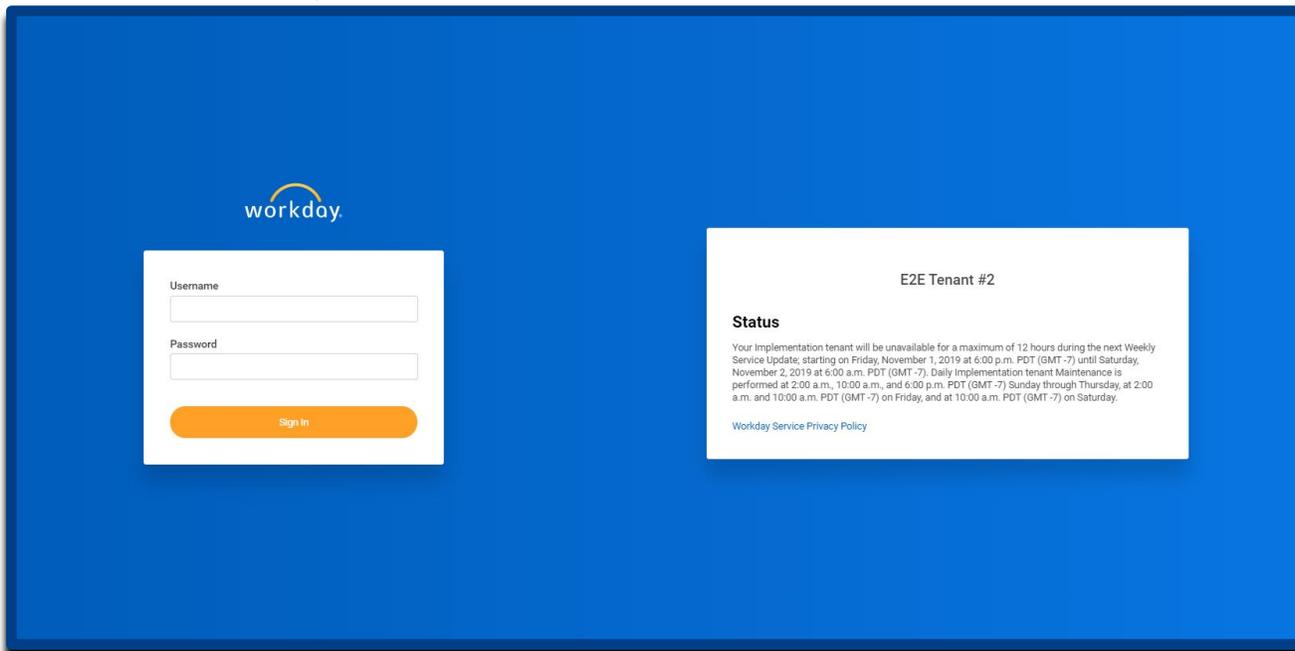
HOW TO ACCESS WORKDAY

From any computer with a secure internet connection,

For training purposes, we are using this temporary link until go-live:

Click on: <https://wd5-impl.workday.com/wday/authgwy/dallascityhall2/login.html> **(update)**.

You will be directed to logon screen as shown below.



Workday utilizes **Single Sign On (SSO) Login**. With SSO, a user logs in once, and gains access to different systems without being prompted to log in again at each of them.

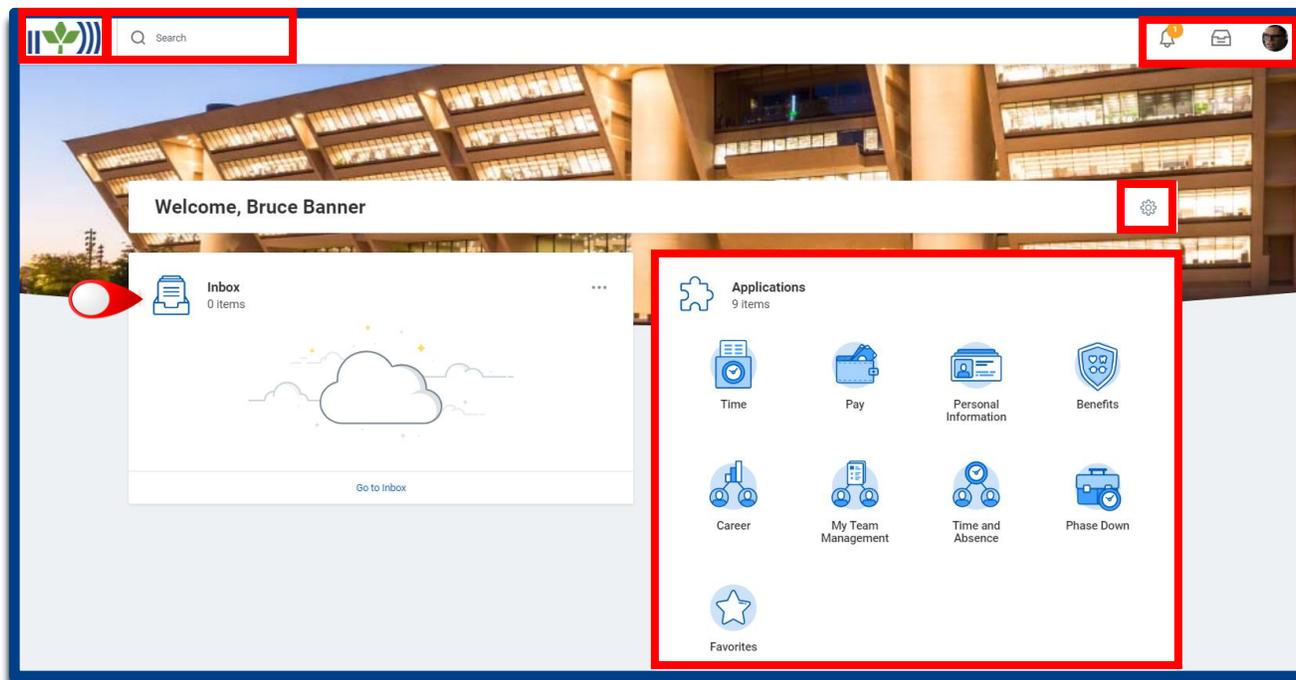
You will use your City of Dallas email credentials to logon to Workday while on the city network.

NAVIGATE THE HOME PAGE



Note: Worklets on the Home page are now referred to as Applications. The two terms may be used interchangeably.

In Workday, you can use tasks to enter data and reports to view data. The Workday Home page displays applications that provide access to tasks and reports. Because the Home page is highly configurable and security may vary, your home page may display different applications.



CONFIGURE APPLICATIONS

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

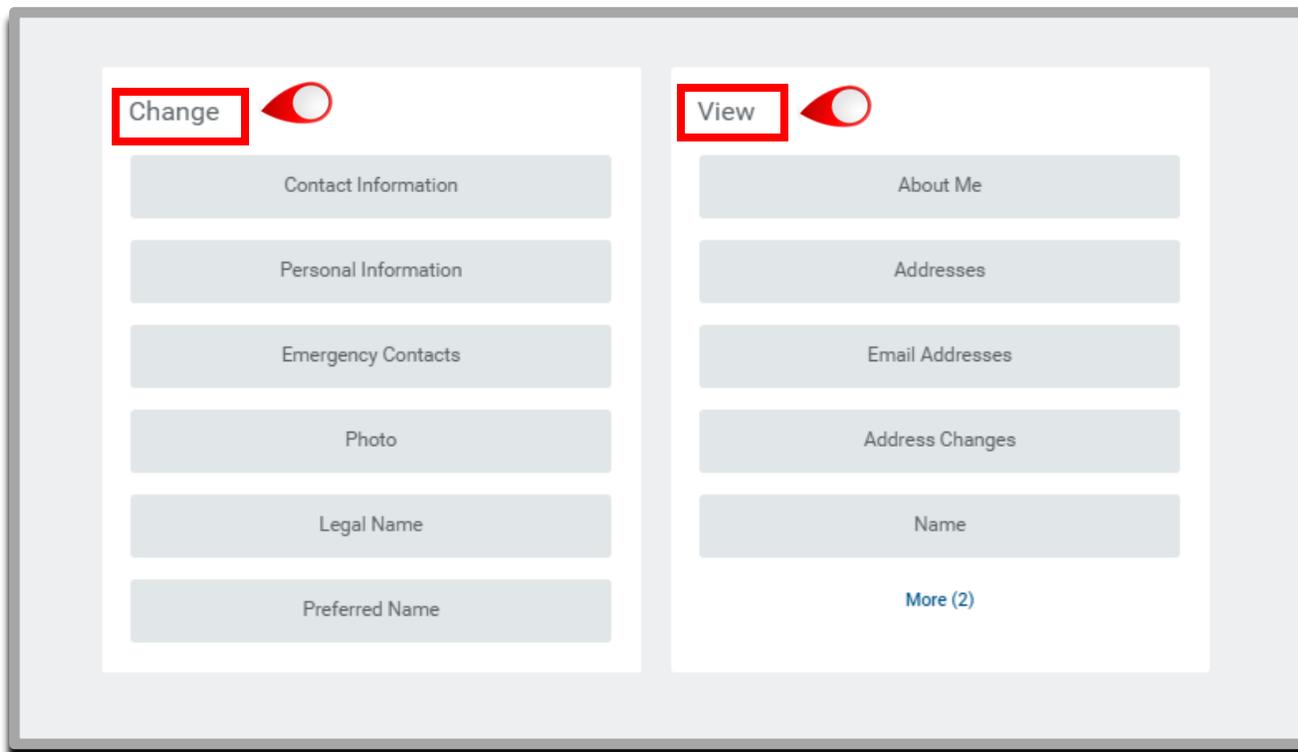
From your Home page:

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 an application from the Home page.
5. Click the **Move Row Up** arrow  or **Move Row Down** arrow  to reorder the applications on the page. To move an application to the first or last position, use the **Move Row to Top**  or **Move Row to Bottom** arrows .
6. Click **OK** and **Done**.

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COMMON WORKLET MENU

After selecting an application, you may see a page layout similar to the image below:

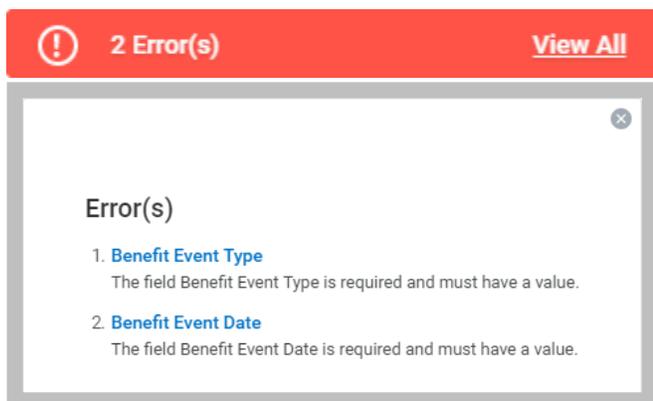


This is a common layout for worklets. There are Actions and View sections. Buttons under the **Actions** section link to tasks you can perform. Buttons under the **View** section link to reports you can view.

ERROR AND ALERT MESSAGES

Error and alert messages display in red and can be clicked on to view error explanations. They typically identify a specific field or fields where information is missing, entered incorrectly, or is in conflict with a rule established by your organization.

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



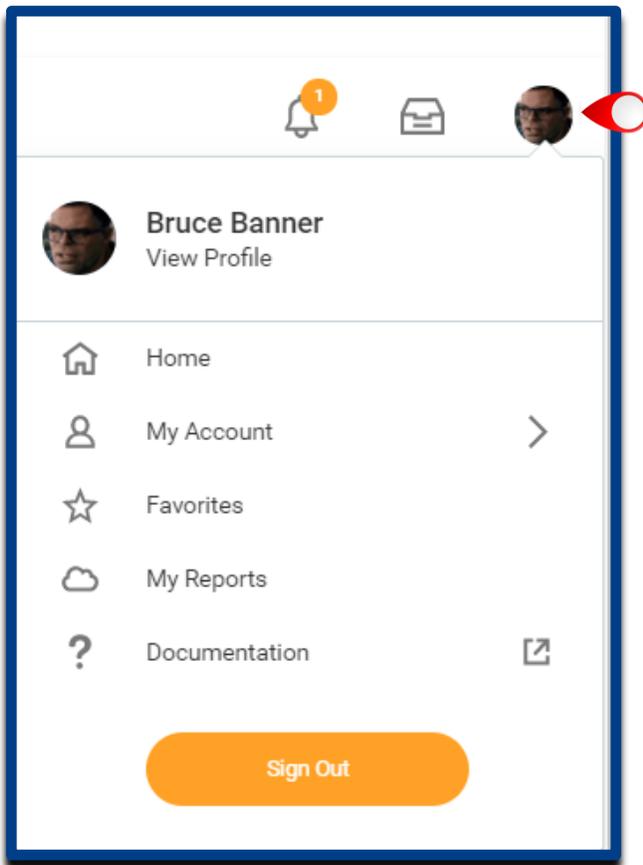
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Alerts notify you of potential problems on a page, but do not prevent you from completing the task. Alerts also display the location of missing or problematic information within the task, report, or business process.



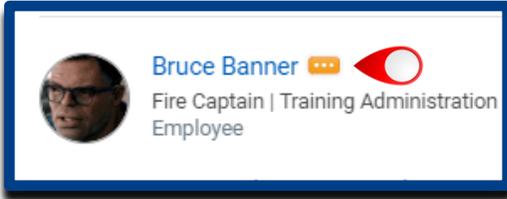
RELATED ACTIONS AND THE PROFILE MENU

The Profile icon 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.



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:

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



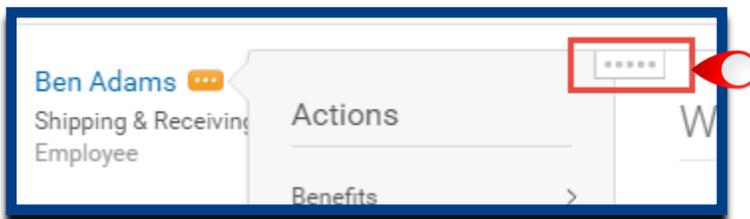
Related Actions in the header of your worker profile is an Actions button that serves the same function.



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

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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. 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”.

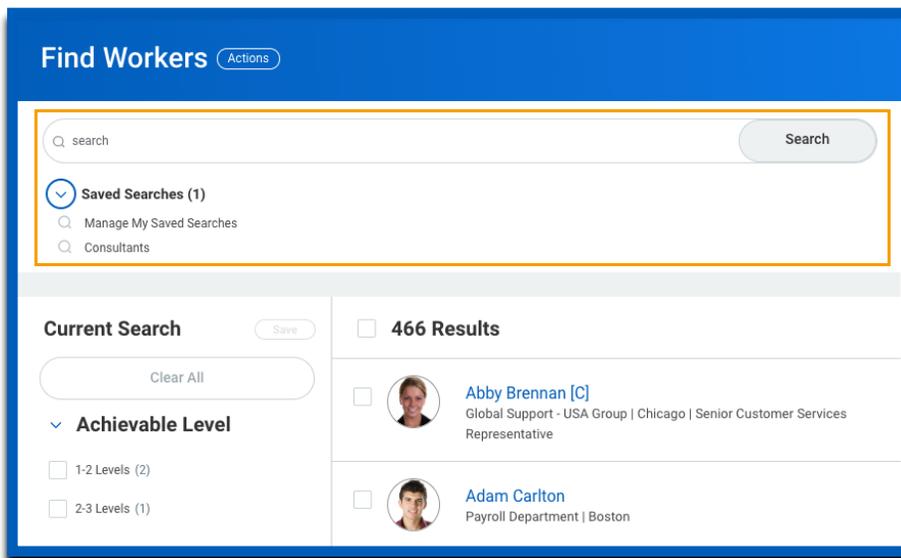
Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To see a list of all search prefixes available to you, enter a question mark (?) in the search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

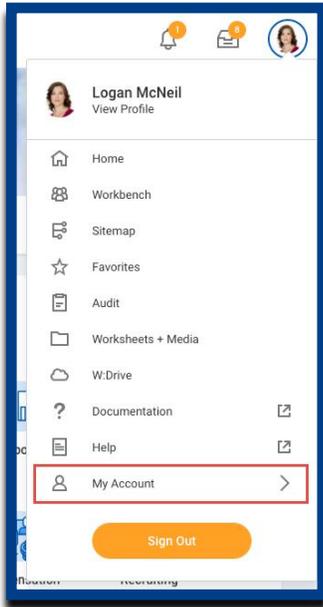
From the search results, click a link for more information or initiate an action from the object’s Related Actions.



CHANGE YOUR ACCOUNT SETTINGS

You can easily change your account settings in Workday. Click 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.

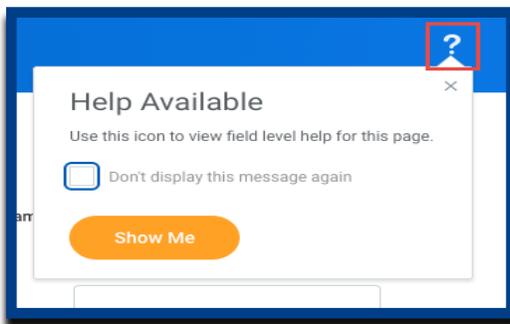
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GUIDED TOURS

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.

