

# GETTING STARTED: USE TOOLS AND NAVIGATION



## NAVIGATE THE HOME PAGE

The home page displays applications that provide access to tasks and reports, as well as announcements & other recommended items.

## DESKTOP

The screenshot shows the desktop interface of the California Pizza Kitchen system. At the top left, the 'Apps Menu' is indicated by a red box around the hamburger icon. In the center, a 'Search!' bar is highlighted with a red box. On the top right, three notification icons are shown: 'Alerts' (bell icon with a red '1'), 'Inbox' (envelope icon with a red '2'), and 'Access your profile' (person icon). The main header features the California Pizza Kitchen logo and the text 'california pizza kitchen' against a background of palm trees. Below the header, the page is titled 'Let's Get Started' and shows the date 'It's Friday, May 27, 2022'. A 'Timely Suggestions' section contains the text 'Here's where you'll get updates on your active items.' To the right, a 'View All Apps' link is highlighted with a red box and labeled 'Can also access apps from here.' Below this, an 'Announcements' section lists two items: 'Open Enrollment - November 2022' and 'Welcome to Workday!'. At the bottom, a 'Recommended for You' section displays two cards: 'Meet Your New Home Page' and 'Showcase Your Best Self with Your'.

## 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.



### Errors

1. **New Delegation (Row 2)**  
Enter a beginning date that isn't in the past.
2. **Begin Date (Row 1 Column 2)**  
Enter a beginning date that isn't in the past.

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.



### Alert

1. **Page Alert**  
The landing page Home displays only the following number of worklets 20, starting with the required worklets.

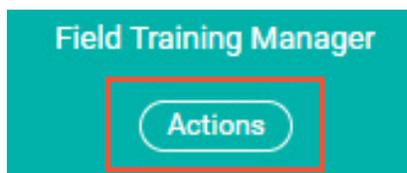
## RELATED ACTIONS AND THE PROFILE MENU

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.

Related Actions display next to an object. You can use them 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.
- In your profile header, you can access your Related Actions from the Actions button under your name.



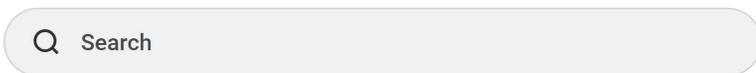
- Similarly, you can find Related Actions in task and report headers.



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## NAVIGATE USING SEARCH

Workday makes it easy to search for people, tasks, reports, and business data using the Search box.



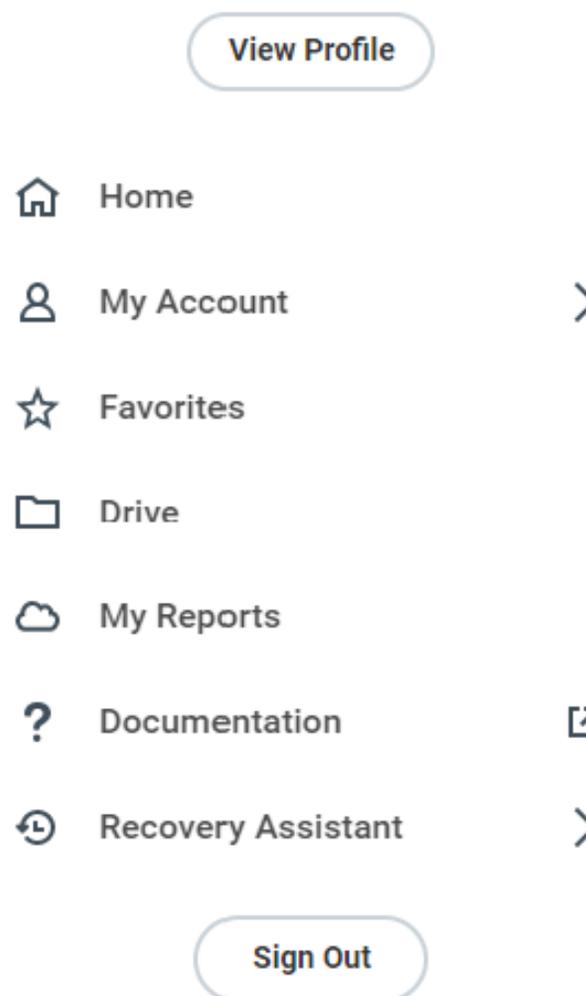
For example, to find a team member, type their name into the Search box and select People to filter the results to only display workers in your organization, then press Enter. Use search categories to filter your search results for more specific results.

Keep in mind that searches find exact matches. If you misspell the search text, you will likely see no results. 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 search for "Alex", the results may not display the name "Alexander".

Recent searches display below the Search box. This makes it easy to navigate to recently used tasks, reports, or business data.

## CHANGE YOUR ACCOUNT SETTINGS

You can easily change your account settings in Workday. In the top-right corner of your Home page, click your Profile icon, 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 and view sign on history.



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## MOBILE

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.

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.

In the top-right corner, tap your profile icon 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 elect to use auto login, among other various tasks.
- Change your password by tapping **Login and Security**.



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 Home

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 General

 Change Preferences

 Login and Security

 Push Notifications

 Organization ID

 Switch Organization

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 Sign Out