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## Access from OKTA

To access Workday, go to your **Okta** dashboard and click on the **Workday** icon.

			٩	🔒 Home 🔺 🖌
Work	+			
workday.	Cffice 365	ConeDrive 🏠	o <mark>₂</mark> Outlook	ESSEX
Workday	Microsoft Office 365 Office Portal	Microsoft Office 365 OneDrive	Microsoft Office 365 Mail	Essex Training
Circle	YIELDSTAR*	LearningBridge	iams	YARDI VOYAGER
On-Site	Yieldstar	Learning Bridge LMS	iCIMS Manager Portal	Yardi Voyager 7
KnowBe4	YARDI VOYAGER	<i>@</i>		RENTCafé
KnowBe4	Yardi 7 Training	iCIMS Career Portal	SuccessFactors	Site Manager
	V			
Buzz	VoyagerPlus Dev			

#### Workday Home Screen

Your Workday home screen is composed of two specific Tiles; your Inbox and your Applications.

- 1. **Inbox** This contains any type of transaction that either needs some type of action such as an approval or a submittal. In addition, you will also receive an email notifying you that you have an item within your Workday Inbox that needs attention.
- 2. **Applications** allows you to initiate tasks as well as view reports. The types of Applications that you will see are based on your specific role within the organization.

Income    Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Income   Inco	Welcome, Mickey Mouse (31998T)				¢
Data Change: Snow White (31997)         21 day(s) ago: - Lue 03/13/2019; Effective 03/04/2019         21 day(s) ago: - Lue 03/17/2019         21 day(s) ago: - Effective 03/04/2019 to 03/17/2019         21 day(s) ago: - Effective 03/17/2019         Go to Inbox         Image: First of the control of	Liens 1	 Applications 12 items	2		
Team Staffing Time Off Pay Pay Personal Information	Data Change: Snow White (31997)           21 day(s) ago - Due 03/13/2019; Effective 03/04/2019           Time Entry: Helen Part (320021) - 48.483334 hours from 03/04/2019 to 03/17/2019           21 day(s) ago - Effective 03/17/2019           Go to Inbox	Turnover Analysis	Team Time Off	Dime and Absence	My Team Management
		Team Staffing	Time Off	Pay	Personal Information
benefits Performance Directory Favorities		Benefits	Performance	Directory	Favorites



## **Types of Applications**

There are several types of Applications that are available based on your role in the organization. Clicking on any of their icons will take you to its interface. The following are just a few that are often used.

- 1. **Team Time Off** This allows you to monitor your Direct Report's and other Associate's time off balances and requested days off.
- 2. **Time Off** This allows yourself to request your own personal time off such as PTO vacation or sick pay as well as Jury duty and Bereavement.
- 3. **Pay** Here you can view your past Payslips, change your Direct Deposit, or update your Tax withholdings for federal and state elections.
- 4. **Personal Information** Access this application if you need to update your Home address, Phone number or your Emergency contacts.
- 5. **Benefits** Go here if you need to make a change due to a Qualifying Life Event. You can also update your Beneficiaries and review your Dependents.



## Workday Logo

Clicking on the logo regardless of where you are in Workday, will take you back to your Home screen where you will see the Inbox and Applications tiles.





#### Search Field

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

Ŵ	Q Donald Duck
	Donald Duck (32000) - Employee Donald Duck (32000) - Supervisory Organization

For example, to find a worker, type their name into the **Search** field and press Enter.

1. 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.

ŵ	Q Donald Duck	
Se	earch Results	
Cat	egories	Search Results 2 items People
0	rganizations	Donald Duck (32000T) Maintenance Supervisor   Mickey Mouse (31008T)   SAN 545 Disney Castle
P	eople	Employee Donald Duck Pre-Hire
Pi Pi	rocesses	Tip: try selecting another category from the left to see other results
Re	ecruiting evenue	
Se	ecurity	
St	tudent	
A	ll of Workday	

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 accuracy and reduce the time to return results.

Search prefixes restrict the search results to a particular type of Workday object.

2. To see a list of all search prefixes available to you, enter a question mark (?) in the search field and press enter.



v	ŵ Q ? 2					
	Search Prefixes					
	You can limit search results by prepending your search text with one of the Search Prefixes below followed by a color. For example, to find on data you need to find. To do so, select a search category associated with that data. You can also use the All of Workday search category whic	ly organizations, begin your search text with 'org'; to find only workers, begin your search text with 'worker'. Additionally, you can limit a h will search everywhere within Workday.	earch results by selecting the catego			
	51 items					
	To Find	Type This Prefix	Search Category			
	Academic Appointee	appointee				
	All Projects	project				
	Background Process	bgrequest	Processes			
	Calculation	calc	Payroll			
	Company	company	Common Organizations			
	Condition Rule Invocation Context	fringebenefitrule				
	Contingent Worker	driveuser				
	Contingent Worker	worker	Common People People for Mobile Global Search			

#### Home Screen Icons

The following icons allow you to access Notifications, your Inbox as well as viewing your own Profile.

1. Notification Bell – Managers and Associates will receive various Alerts from the Workday system. Emails will also be sent to your Outlook notifying you of these alerts. For example, these alerts could include a *missed time punch* for one of your hourly associates that needs to be corrected or one of the *business processes* that you initiated is now complete.





2. **Inbox Link** – This is a secondary link that takes you to the same place that your Inbox tile takes you to. Here you can initiate transactions such as an approval or a submittal.



3. Image Link – This is the Settings menu for Workday which allows you to access your Home page, view your Favorites such as a report or task that you commonly see or use as well as your Account Settings within the My Account link. In addition, you can also click on the View Profile to access your own profile where it allows you to review various tabs of information.







## **View Profile**

By clicking on the **View Profile** link, an Associate can review various tabs of information such as their Job, Compensation, Benefits, and Pay.

ŵ	Q Search		
Mic	Rey Mouse (31998T) Community Manager - Exempt	Cocation SAN 545 Disney Castle	Manager Walt Disney (31997T)
	Team		
88	Summary		
ē	Job		
•	Compensation		
Ø	Benefits		
ß	Pay		
â	Time Off		
	Contact		
8	Personal		
	Performance		

1. Actions Button – This allows an Associate to initiate specific tasks on their own behalf that are called Related Actions such as Benefits, Business Process, or Compensation to name a few.

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			•	⊘ Locat SAN	tion 545 Disney Castle		
Mic	key M		Γ)				
	Communit	Actions					
		Actions					×
		Benefits	>	worker	MICKEY MOUSE (319981)		
88	Summa	Business Process	>		Contact		
60	Job	Compensation	>		Work Address		
	Compe	Payroll	>		123 Main Street San Diego, CA 92113 United States of	America	
1	Benefit	Payroll Interface Personal Data	>	View Te	eam		
G	Pay	Talent	>				
ä	Time O	Time and Leave	>	✓ Job			
	Contac	Workday Account	>	Ormanization			
ප	Person	Worker History	>	Organization Business Title	Wait Disney (319971) Community Manager - Exempt		
1	Perforr	Favorite	>	Manager	Walt Disney (31997T)		
		Preferences	>	Location	SAN 545 Disney Castle		~



<u>Important Note</u>: Related Actions display next to an object. Most of the actions available through Related Actions are also available through Applications or the Search bar. Three common types of Related Actions can be seen in the following images.



 Team Org Chart – By clicking on the Team link, it will take you to view the Org Chart for your team.



- 3. **Up/Down Button** By Clicking on the **Up** or **Down** button, you can then view the hierarchy of the **Org Chart** knowing who reports to whom.
- 4. Print Org Chart You also have the option to print the Org Chart by clicking on the Printer icon.





5. The Org Chart can be printed in a variety of formats that includes Excel, PDF, and PowerPoint.

	Micke	ey Mouse (31998T)		
Print Org	J Ch	art		٦
File Name	*	Mickey Mouse (31998T)		
File Format	*	Excel	•	
Levels	*	select one		
Include Picture	es	Excel		ł
		PDF		
Pri	int	Powerpoint		
лотор			 	99 er

#### **Error Messages**

Error 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 conflicts with a rule that was already established.

Important Note: Errors prevent you from completing a task until the error is fixed.				
() 2 Error(s)	<u>View All</u>			
	0			
Error(s)				
<ol> <li>Benefit Event Type The field Benefit Event Type is required and must I</li> </ol>	have a value.			
<ol> <li>Benefit Event Date The field Benefit Event Date is required and must it</li> </ol>	nave a value.			

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.

2	1 Alert(s)	<u>View All</u>
	Alert(s)	c
	<ol> <li>Page Alert The landing page Home displays only the following number of worklets 20</li> </ol>	), starting with the required worklets.