

Workday Basic Navigation

Audience: Employees



Overview:

This job aid helps you get started with Workday. The navigation principles covered here are not specific to any one business process; they are intended to help you navigate through the system across all business processes.

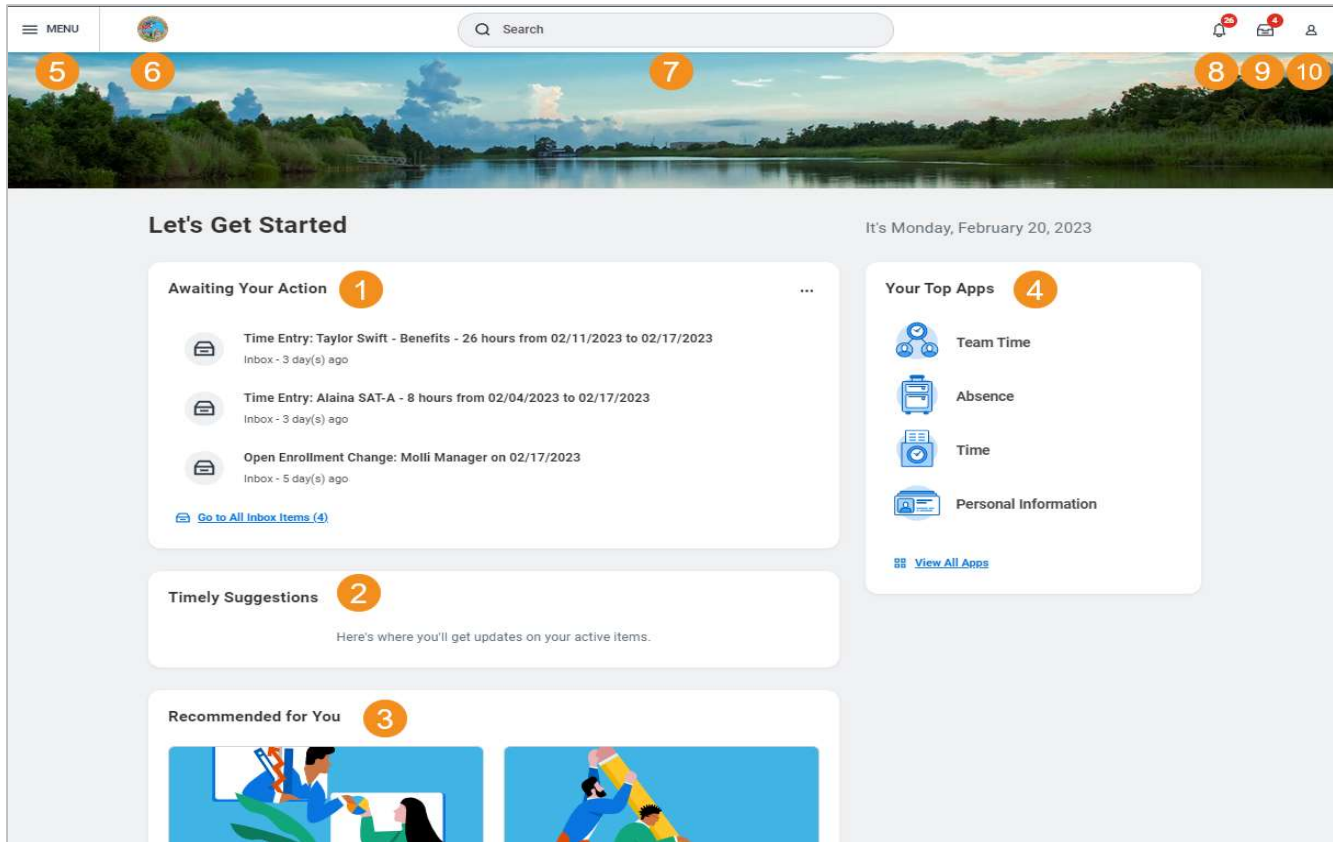
It is important to understand that what you see in Workday may be different from what someone else might see. The access you have in Workday is based on your security profile and your role at Mobile County.

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Navigating the Workday Homepage

Your Workday homepage contains various navigation components and screen elements that you need to be familiar with:



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1. **Awaiting Your Action** – Displays the most recent actions in your inbox.
2. **Timely Suggestions** – In this section of the screen, Workday suggests certain tasks that may be coming due soon.
3. **Recommended for You** – Recommended for You automatically suggests tasks you may need to do based on what you have previously done in Workday, as well as suggested knowledge articles you might be interested in.
4. **Your Top Apps** – Shows your top applications. Click the View All Apps link to view all Workday applications that are available to you. Your applications provide access to different tasks and reports. Note that the applications you have access to vary, based on your role at Mobile County.
5. **Global Navigation** – Access and manage all your applications.
6. **Home button** – Click the Mobile County icon to return to the homepage from any screen within Workday.
7. **Search bar** – Use the Search function to find tasks, reports, or people.
8. **Notifications icon** – Click the Notifications icon to view recently completed business processes or other actions that may impact you.
9. **Inbox icon** – Your Workday Inbox contains tasks that require action from you; the homepage also displays a preview of your most recent inbox items.
10. **Profile icon** – Access your personal and work-related information in your Workday Profile or edit a variety of features and settings on your account (including password and language).

Global Navigation

The **Global Navigation** icon lets you view all the Workday applications that are available to you. Your applications provide access to different tasks and reports. Remember that the

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applications you have access to vary, based on your role at Mobile County.

A screenshot of the Workday navigation interface. On the left, there is a "MENU" button with a hamburger icon and the Mobile County logo. On the right, a dropdown menu is open, showing a list of applications under the "Apps" tab. The list includes: Absence, Time and Absence, Time, Cost Center Manager, FIN - FDM Reports, and Team Absence. Each item has a small icon to its left.

Notifications

Notifications are messages that Workday sends automatically as certain tasks and processes are completed. Notifications may impact you, and, while they do not always require any action in Workday, they may require your action outside of the immediate business process in Workday.

Access your **Notifications** by clicking the **Notifications** icon in the upper right corner of your Workday screen.


A screenshot of the top navigation bar in Workday. It includes a "MENU" button, the Mobile County logo, a search bar with a magnifying glass icon and the text "Search", and three icons on the right: a bell icon with a red notification badge showing "26", an envelope icon with a red notification badge showing "4", and a user profile icon.

A screenshot of the "Notifications" panel in Workday. The panel has a title "Notifications" and a sub-header "From Last 30 Days". It includes filters for "Viewing: All" and "Sort By: Newest". A notification is displayed with the title "Create Position: ab Test" and the message "Create Position - Successfully Completed" from "1 day(s) ago". Below the notification, there are links for "Details" and "Create Position: ab Test".



Workday Inbox

Your Workday **Inbox** is the central location for tasks that require your attention. It also contains an archive of recently completed tasks.

You can access your Workday Inbox by clicking the **Inbox**  icon in the upper right corner of your Workday screen. The number next to your inbox indicates how many actions you have waiting for you to complete.



Once you get to your Inbox, the **Actions** tab defaults and lists any pending transactions that require an action from you. Click each item to open the transaction details and complete the task.

Items in your Inbox cannot be deleted; they move to the **Archive** tab once you have completed or submitted the task.

Task	Business Process	Assigned To	Action	Reassign To
Open	Preferred Name Change: Eric Employee As Self (Terminated)	1	<input type="text"/>	
Open	Personal Information Change: Eric Employee As Self (Terminated)	1	<input type="text"/>	
Open	Onboarding for Eric Employee As Self	1	<input type="text"/>	
Open	Home Contact Change: Eric Employee As Self (Terminated)	1	<input type="text"/>	
Open	Onboarding for Eric Employee As Self	1	<input type="text"/>	

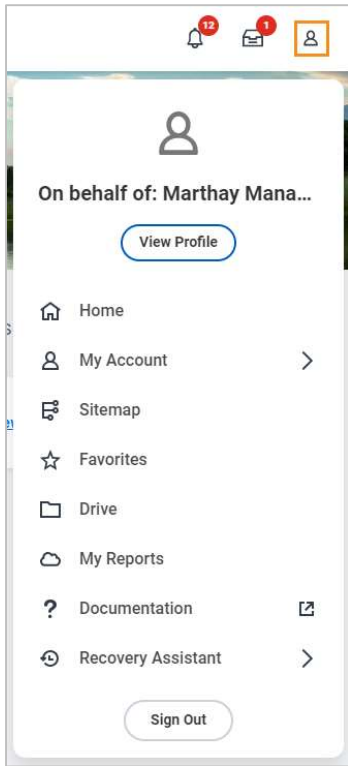
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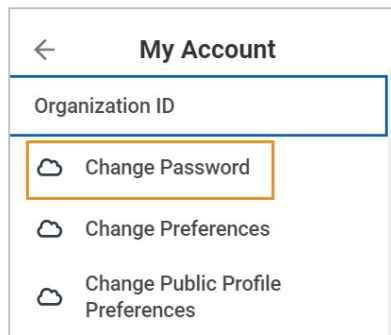
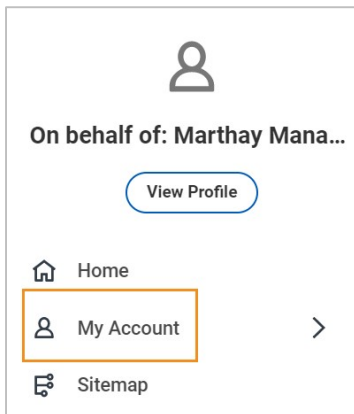


The Profile Icon

The **Profile** icon in the upper right corner of your Workday screen contains links to your homepage, favorites, and your Workday account.



To change your password, select **My Account** and then select **Change Password**.



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Enter the required password information and click **OK**.

Change Password

Changing your password will end all other Workday sessions. Please ensure you have no unsaved work before proceeding.

Password Rules Your new password must not be the same as your current password or user name. Minimum number of characters required: 8. The following character types must be represented: alphabetic characters, uppercase characters, lowercase characters, Arabic numerals 0 - 9, special characters !"#%&'()*+,-./:;<=>@[*_()-]. The password must not have been used within the following number of last passwords: 4.

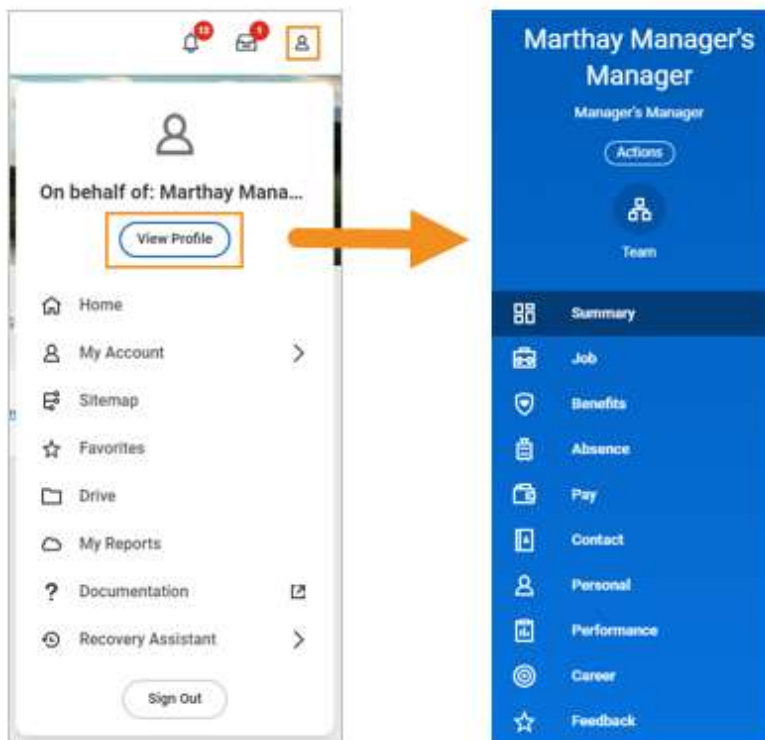
Current Password*

New Password*

Verify New Password*

OK Cancel

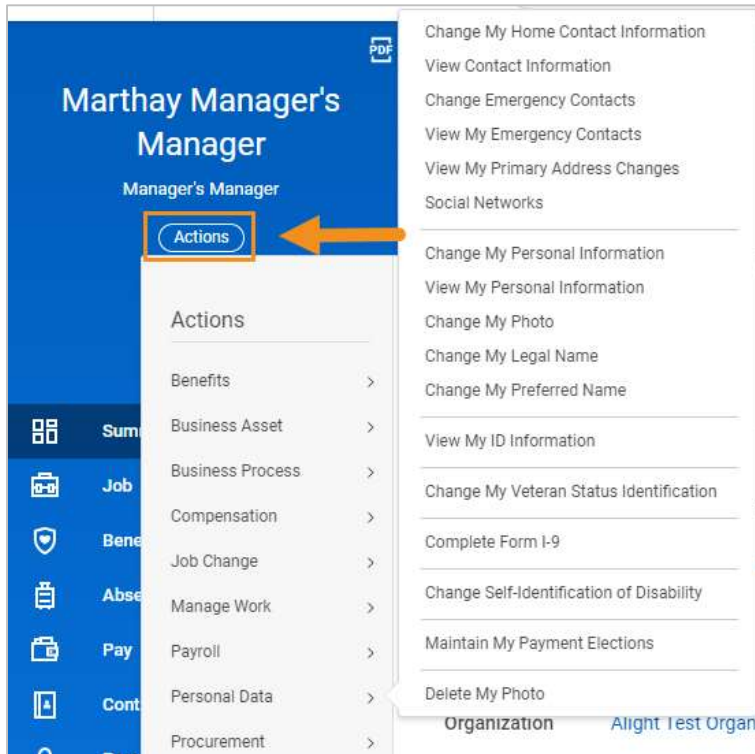
From the **Profile** icon, you can also access personal information, such as your job and compensation details, your contact information, and more, by clicking **View Profile**, below your name.





The Actions Button

The **Actions** button on your Workday profile allows you to perform certain actions, such as viewing and updating your personal information, without going through an application on the homepage.



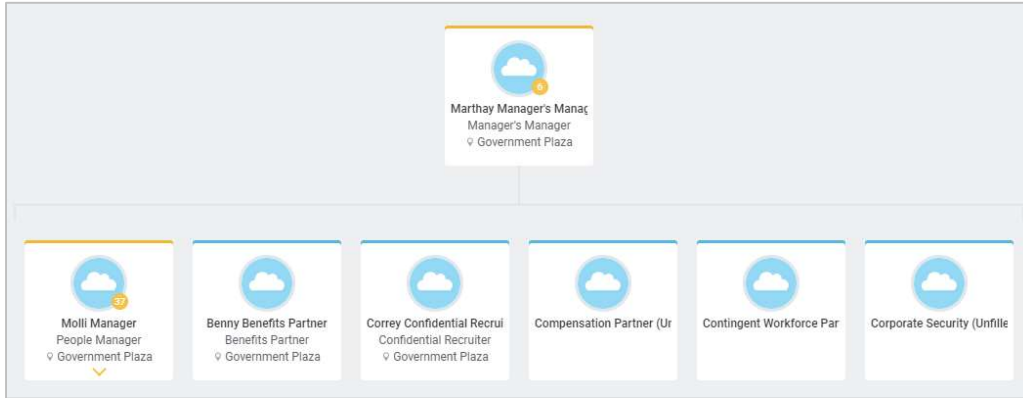
Your Organization

Your Workday **Profile** also gives you quick access to your **organizational chart**. Click the **Team** icon to view the organizational chart.



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Within your org chart, you can scroll up the hierarchy to see higher levels of our organization. You can also click on members within your organization to view their job details.

Errors and Alerts

When required information in a task is missing, incorrect or ambiguous, Workday informs you via an **Error** or **Alert** message.

Errors (red) are “hard-stops” and will not allow you to proceed until you have fixed the missing or incomplete information. Click on the **Error** to see the pop-up box with a description.

A screenshot of the "Change My Preferred Name" form for "Molli Manager". The form includes fields for "Use Legal Name As Preferred Name" (checkbox), "Country" (dropdown menu showing "United States of America"), "Prefix" (text field), "First Name" (text field with "Molli"), "Middle Name" (text field), and "Last Name" (text field). The "Last Name" field is highlighted with a red border and has a red asterisk next to it. A red error message is displayed below the form: "Error: The field Last Name is required and must have a value." A red notification bar in the top right corner of the form area says "1 Error".

A screenshot of an error pop-up box. The box has a close button (X) in the top right corner. The text inside reads: "Error" followed by a numbered list item "1. Last Name" and the message "The field Last Name is required and must have a value." An orange arrow points from the error notification bar in the previous screenshot to this pop-up box.


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Alerts (yellow) are informational and intended to notify you of a potential problem on the page or with your information but will allow you to complete the transaction. Click on the **Alert** to see the pop-up box with a description.

Change Preferences

 1 Alert

Global Preferences

Default Locale English (United States) - en_US

Preferred Locale English (United States) - en_US

Alert: Sign out and sign back in to Workday to apply your Locale change.

×

Alert

- Preferred Locale**
Sign out and sign back in to Workday to apply your Locale change.