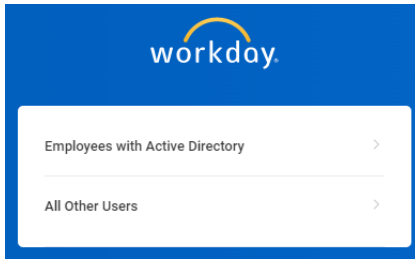


Getting Started - Workday Basics

USER GUIDE

This user guide will assist employees in understanding the common features of Workday and navigating Workday's basic functionalities.

LOGGING INTO WORKDAY



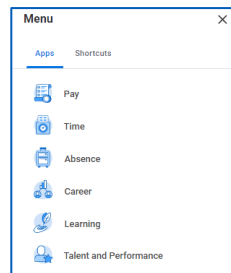
Employees with Active Directory: Log in with your County network Username and provided password. Will need to use Multi Factor Authentication. Upon first login, you will be required to reset this password and answer 3 challenge questions.

All Other Users: Log in with the provided Workday Login and password that was sent to you. Upon first login, you will be required to reset this password and answer 3 challenge questions. There is no Multi Factor Authentication and do not need to be on VPN. *Personal email address will need to be entered to receive communications.* You will need to log into Workday every 90 days to keep their user ID active. Challenge questions are used to reset the password.

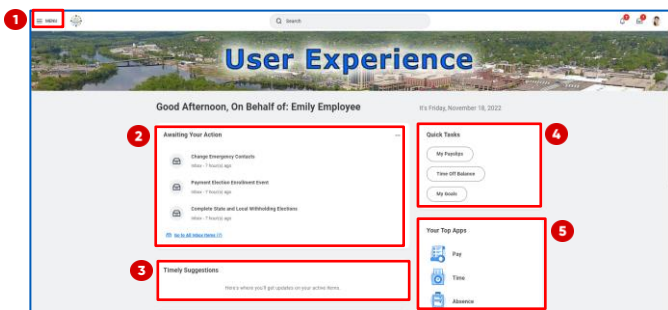
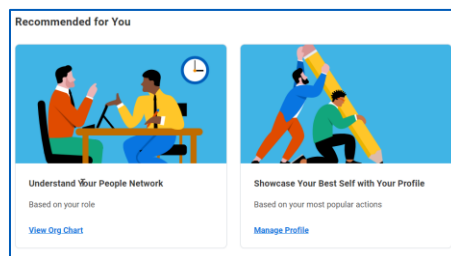
WORKDAY HOMEPAGE

The Workday **Home Page** provides access to **Top Applications, Notifications, Inbox,** and **Profile**, and displays applications that provide access to tasks and reports.

1. **Global Navigation Menu:** This menu provides access to **Applications** and **Shortcuts**.
2. **Awaiting Your Action:** This section shows any inbox tasks that the user needs to attend to.
3. **Timely Suggestions:** Reminders and updates are displayed here.
4. **Quick Tasks:** This menu provides quick access to **My Payslips, Time Off Balance, and My Goals**.
5. **Your Top Apps:** Displayed based on your permissions.
 - a. Select **View All Apps** (at the bottom of the Your Top Apps section) to expand the **Global Navigation Menu** and then select an App to view information or take actions in that specific area.



6. **Recommended for You:** Browsable content to help users learn about specific features in Workday. Use the arrows in the header to move through the topics.



RETURNING TO THE HOMEPAGE

No matter where you are in Workday, click the City of Wausau/Marathon County icon to return to the Homepage.



WORKDAY JOB AIDS

To view the job aids for Workday, Click Menu and scroll down to the bottom under External Links.



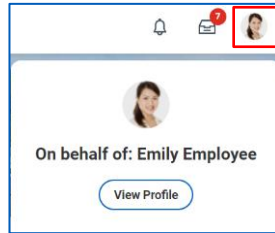
Getting Started - Workday Basics

USER GUIDE

NAVIGATING THE WORKER PROFILE

From the **Home Page**:

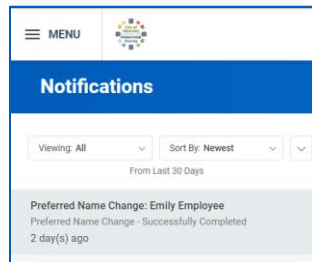
1. Click the profile picture in the upper right-hand corner.
2. Click **View Profile** to access the Worker Profile.



WORKDAY NOTIFICATIONS

From the **Home Page**:

1. Click the Bell icon to navigate to **Notifications** to view updates and reminders provided.
2. From **Notifications**, there are options to sort by All or Unread, as well as sort by Newest on Top or Oldest on Top.

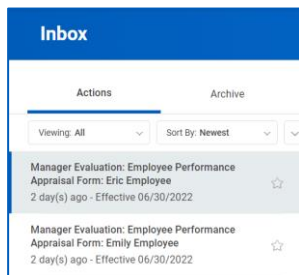


Note: A user must mark a notification as read by clicking the blue circle on the right of the notification for it to no longer display as unread.

WORKDAY INBOX

The **Workday Inbox** includes notifications of tasks, approvals, due dates, and other items sent as part of business processes that involve the user. Failure to act on an **Inbox** task may prevent that process from proceeding.

1. To access to Workday Inbox, click on **Inbox**.
2. View any **Inbox** items.

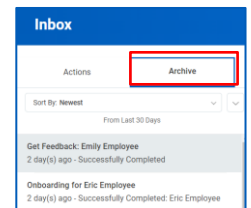


WORKDAY ARCHIVE

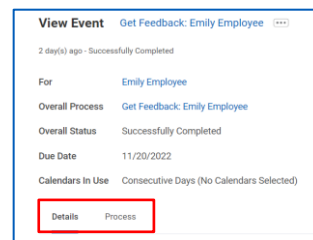
Any open task displays in the **Actions** tab, tasks previously acted on are housed in the **Archive** tab for 30 days.

From the **Home Page**:

1. Click on **Inbox**.
2. Click on **Archive** tab.
3. On the right of an archived task, view the **Details** and **Process**.



- a. **Details:** Displays the data entered when initiating a transaction or approvals following the review of a transaction that routed to the Inbox.
- b. **Process:** Lists the steps that occurred prior to a manager's involvement with the process, if applicable, and the next steps yet to be completed.

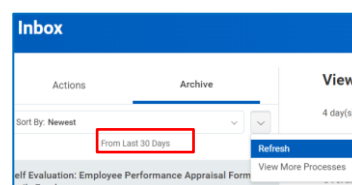


ACCESSING OLDER ITEMS

Items that are greater than 30 days old can also be accessed in the **Archive** tab.

From the Home Page:

1. Click on **Inbox**.
2. Click on **Archive** tab.
3. Click the drop-down menu in the **Archive** tab and select **View More Processes**.
4. Enter the **Start Date** and **End Date** as applicable.
5. View the **Business Process Participation** items.
 - a. Click on the column heading to sort & filter.
 - b. Click any Business Process transaction link to see more details, or hover over the link to reveal the "further actions" button.
 - c. Right click on Business Process transaction link, click on "see in new tab" – this will keep your results and allow you to review more details for the business process that you want to look at.





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USER GUIDE

ERROR & 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 organization. Click the message to view the error details and then the blue hyperlink to be taken to the area of the error.

Errors display in red. A task cannot be completed until all errors are corrected.



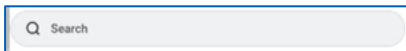
Alerts display in orange. They notify users of potential problems on a page, but do not prevent task completion. Click on the alert message to view the location of missing or problematic information within the task, report, or business process.



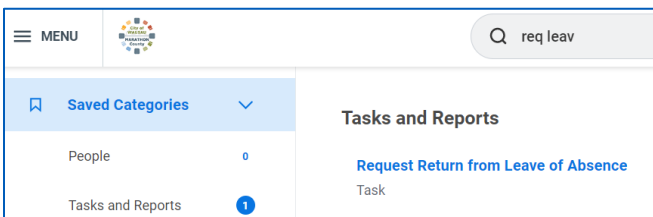
USING SEARCH

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

1. To find an employee, type their name into the **Search** field and press **Enter**.



2. When searching for the **Request Leave of Absence** task, users can use the search string "req leav" or simply "leave" to search.

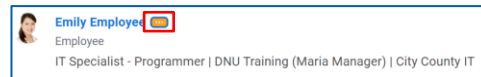


RELATED ACTIONS OF SEARCH RESULTS

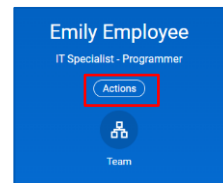
From **Search** results, click a link for more information, or initiate an action from the object's **Related Actions**.

Related Actions display next to an object and can be used to access relevant actions. In Workday there are multiple ways to navigate to the same task, report, or data. Most Actions available through Related Actions are also available through Applications or Search. The following images illustrate three common types of Related Actions:

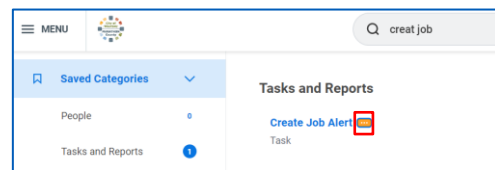
1. Related Actions may appear when hovering the cursor next to a business object or link. Workday calls this icon a "Twinkie"




2. In the Profile header, Related Actions can be accessed from the **Actions** button under a user's name.



3. Find Related Actions in tasks and report headers.



 **Note:** Searches find exact matches. *If the search text is misspelled, there will likely be no results.* As a user becomes more familiar with certain tasks and reports in the Workday system, partial search can be utilized to quickly find tasks.



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GLOSSARY OF COMMON ICONS FOUND IN WORKDAY

TERM	DEFINITION	ICON
Home Page	Your home page displays items such as: <ul style="list-style-type: none"> • Tasks awaiting your action (Inbox) • Notifications • Quick Tasks • Your Top Apps • Your Profile • Main Menu (All Apps & Shortcuts) 	
Home Button	City of Wausau/Marathon County- click this to return to the Home Page	
Profile	Takes you to your Profile. Profile is where enter and change your personal information. This includes tabs on your job, compensation, pay, absence, contact and personal information, performance, and career.	
Inbox	Contains tasks for action. Check this regularly. You can view your completed tasks by clicking on Archive.	
Notifications	Used to review items you need to know. Does not require an action within Workday. You can clear these out by clicking the blue circle on the right of the notice.	
Menu	Global Navigation (Hamburger)- Apps and Shortcuts found here. This is where you will go for Absence and Time Tracking.	
Search Bar	Search Box- allows you to quickly search for tasks, people & reports.	
Add Button	Click to add a row or value.	
Delete Button	Click to delete a row or value.	
Soft Alert Message	Soft warning that alerts you of information that is not required. This message allows you to continue your work. Click within the alert to be taken to the area to be corrected.	
Hard Error Message	Hard warning that alerts you when there is an error that must be corrected to move forward in a process. Click within the error to be taken to the area to be corrected.	
Arrow	A clickable icon that opens the page to additional areas that can be edited. Also referred to as the More icon.	



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Actions and Related Actions	(Twinkie)- used to initiate related transactions. Also, a pop-out menu.	
Shortcut	Makes task item as a favorite shown on the left side of homepage.	
Prompt	A list of values that a valid for a field.	
Required Field	Any field with a red asterisk is required.	
Attachment Icon	A clickable icon that lets you attach .pdf files, Word, and Excel documents to a task.	
Back Button	A clickable button that returns you to the previous page.	
Calendar	A clickable icon that opens a calendar to select a date.	
Cancel Button	A button that disregards a change.	
Edit Button	Allows you to make changes to a field.	
Undo Button	Revert back to previous entry/information.	
Save Button	Saves the information as you go through a task before you hit submit.	
Chart Icon	A clickable icon used to view a report as a chart.	
Comments Icon	A clickable icon used for you to leave comments for yourself and/or other users for a particular page or task.	
Configure Icon	A clickable icon on the home page where you can personalize your shortcuts on the Main Menu.	
Continue Button	A clickable button that advances you to the next page or the next step in your tasks process.	
Submit	Completes the task and is submitted in Workday.	
Save for Later	Allows you to save your task to complete at a later time.	
Details	A clickable icon that opens additional information relating to your task.	
Done Button	A button that closes a confirmation screen.	



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Excel	A clickable icon used to view a page as an Excel file. This can be restricted using the domain Export to PDF and Excel.	
Filter	A clickable icon used to narrow down data or filter data to display from one or more columns.	
Guide Me Button	Guides you through the fields and sections of a task toward completion.	
Location, Phone, Email Icons	Located in the Worker Profiles. Location is location of the worker, email is email address of the worker, and phone is the phone number the worker has on file.	
More Button	A button that displays several additional choices based on the business process.	
Next Button	A clickable button that advances you to the next page or the next step in your tasks process.	
OK Button	A clickable button to accept and save your changes.	
Open Button	A clickable button to open the desired task.	
View PDF/ Printable Version	A clickable icon used to view a page as a printable PDF file. This can be restricted using the domain, Export to PDF and Excel.	
Progress Bar	The bar tracks your progress working through a task. Allowing you to move forward or return to a previous page within the task.	
Remove Button	A clickable icon that deletes an area.	
Request Absence Button	A clickable button to request absence from the Request Absence app.	
Refresh	To refresh your Workday screen, click on the circle with an arrow on the Workday tab. You can also click the "F5" key.	
Save Button	A clickable button to save the item you may be working on.	
Sign Out	A clickable button to sign out of Workday.	



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USER GUIDE

This is a list of the most commonly used Applications. Apps are listed under Menu in the top-left corner of your homepage. You can also see the Apps by clicking on View All Apps under Your Top Apps.

☰ MENU



☰ [View All Apps](#)

TIME



An application related to time tracking, entering your daily punches.

PAY



An application related to pay including pay history payslips, payment elections, deductions, and tax documents.

ABSENCE



An application related to absence (PTO), view your time off, time off balances and team calendar.

BENEFITS



An application related to benefits, including change benefits, beneficiaries, and dependents. View your benefit elections and current benefits cost.

CAREER



An application related to your career with certifications, education, languages, job history, and awards.

DIRECTORY



An application related to our directory. You can view a list of your coworkers, see information about other workers in the company and view the organizational chart.

EXPENSES



An application related to expenses, including creating and editing expense reports, transactions and recent expenses.

FAVORITES



An application containing your favorite reports and tasks for easy access in one place. You can also save custom reports you have created here.



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INTELLITIME / RTVISION



An application for recording time used by specific departments including- Sheriff and Highway.

LEARNING



An application related to Workday learning catalog.

ONBOARDING



An application related to new hires with helpful information.

PERSONAL INFORMATION



An application related to your personal information, including address, email, emergency contacts, photo, legal name, preferred name, and government IDs.

TALENT & PERFORMANCE



An application related to performance, including viewing goals, reviews, feedback received, and skills.

RECRUITING



An application related to hiring used by Managers and HR Partners.

PURCHASES



An application related to requisitions, procurements, and receipts.

Note: There may be more or less applications available to you depending on your security level. To configure your Apps, click on the gear next to All Apps to add or remove worklets.



All Apps

Use the plus to add and search for a new application. Or the minus to remove an application listed.

