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### Getting Started: Workday Basics

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Event</td>
<td>An event that gives you the opportunity to change your benefit elections. These include staffing changes (such as getting hired or promoted) and life events (such as getting married or having a child.)</td>
</tr>
<tr>
<td>Business Process</td>
<td>A business process in Workday includes tasks that you can initiate, act upon, and complete in order to accomplish a desired business objective. Business processes are created using a combination of Actions, Approvals, Approval Chains, To Dos, and/or Checklists. An Action can be a single task or sub process, which is also a combination of Actions, To Dos, and/or Checklists. Within the process, conditions can be defined which will identify whether a step will be initiated. Notifications can also be created to let a Workday user know that a step has begun, completed, or that a particular review response was selected. Examples of business processes include Hire, Change Job, Request Compensation Change, Terminate Employee etc.</td>
</tr>
<tr>
<td>Headcount</td>
<td>The number of workers in an organization.</td>
</tr>
<tr>
<td>Life Event</td>
<td>A benefit event that occurs in your personal life, such as getting married or having a child.</td>
</tr>
<tr>
<td>Org Chart</td>
<td>A visual depiction of the structure of an organization. It outlines the roles, responsibilities, and relationships between individuals within an organization.</td>
</tr>
<tr>
<td>Staffing Event</td>
<td>Any event that changes your position or job, such as a hire, transfer, or promotion. Staffing events usually trigger an opportunity to edit/modify benefit elections.</td>
</tr>
<tr>
<td>Supervisory</td>
<td>Supervisory organizations group workers into a management hierarchy and are the primary organization type in Workday’s HCM. All workers are hired into supervisory organizations. Organization assignments such as company, cost center, and region can be configured for supervisory organizations, and unique business processes can be configured for them as well.</td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Worker Profile</td>
<td>Your continuously updated page which provides a quick view of your experience, skills, education, and projects.</td>
</tr>
<tr>
<td>Worklets</td>
<td>A compact report displayed as an icon (a tile or a bubble) on any landing page, providing easy access to tasks and information that are used regularly. Examples: My Leadership Roles, Open Positions, and Anniversaries.</td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Main Menu** | The main menu displayed on the home page that displays your profile photo with a blue icon for pending Notifications and a red count badge for Inbox items, and these menu options:  
  • View Profile - displays your worker profile.  
  • Home - displays the Home landing page.  
  • Inbox - displays a count for your action items and takes you to your Inbox.  
  • Notifications - displays a count for your new notifications and takes you to your Notifications page.  
  • Favorites - a configurable list of favorite tasks, reports, business objects, and custom and shared custom reports available to you, sorted by category (secured to the Favorites domain in the System functional area). Use the Manage Favorites task to configure this list.  
  • W: Drive - a virtual drive where you can store generated reports (secured to the W: Drive domain in the System functional area). This is not a mapped drive on your computer.  
  • My Account - provides access to these account management tasks:  
    - Change Preferences  
    - Switch Accounts (if you are a delegate)  
    - Sign Out | ![Main Menu Icon](image) |
<table>
<thead>
<tr>
<th>Term</th>
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<tr>
<td>Search</td>
<td>A field on the home page that enables you to find tasks, reports, and people within your organization. Search allows you to narrow results by categories including Common, Organizations, and All of Workday. Search also allows you to filter results by specified criteria. For example, if you select the Find Jobs task, you can sort results by Organization, Location, Worker Type, etc.</td>
<td></td>
</tr>
<tr>
<td>Workday Logo</td>
<td>Displays your home page. This icon can also be used to navigate back to your home page.</td>
<td></td>
</tr>
<tr>
<td>Actions and View</td>
<td>Buttons for commonly grouped tasks and reports. Accessed through worklets.</td>
<td></td>
</tr>
<tr>
<td>Add Button</td>
<td>A clickable button that lets you add additional information to any task.</td>
<td></td>
</tr>
<tr>
<td>Alert Message</td>
<td>Soft warning message that alerts you about system limitations based on configuration. This message enables you to continue your work without resolving the issue.</td>
<td></td>
</tr>
<tr>
<td>Arrow</td>
<td>A clickable icon that opens the page to additional areas that can be edited. Also referred to as the More icon.</td>
<td></td>
</tr>
<tr>
<td>Attachments Icon</td>
<td>A clickable icon that lets you attach .pdf files, Word, and Excel documents to a task.</td>
<td></td>
</tr>
<tr>
<td>Back Button</td>
<td>A clickable button that returns you to the previous page.</td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td>Definition</td>
<td>Icon</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Calendar</td>
<td>A clickable icon that opens a calendar to select a date.</td>
<td><img src="calendar_icon" alt="Calendar" /></td>
</tr>
<tr>
<td>Cancel Button</td>
<td>A button that disregards a change.</td>
<td><img src="cancel_icon" alt="Cancel" /></td>
</tr>
<tr>
<td>Chart</td>
<td>A clickable icon used to view a report as a chart.</td>
<td><img src="chart_icon" alt="Chart" /></td>
</tr>
<tr>
<td>Comments Icon</td>
<td>A clickable icon used for you to leave comments for yourself and/or other users for a particular page or task.</td>
<td><img src="comments_icon" alt="Comments" /></td>
</tr>
<tr>
<td>Configure Worklets</td>
<td>A clickable icon on the home page where you can configure the worklets that appear on your home page. Depending on your organization's configuration, some worklets may be required, while others are optional. This icon can also be used as a Settings icon.</td>
<td><img src="configure_worklets_icon" alt="Configure Worklets" /></td>
</tr>
<tr>
<td>Continue Button</td>
<td>A clickable button that advances you to the next page or the next step in your tasks process.</td>
<td><img src="continue_icon" alt="Continue" /></td>
</tr>
<tr>
<td>Delete Row</td>
<td>A clickable icon that removes the current row from a grid.</td>
<td><img src="delete_row_icon" alt="Delete Row" /></td>
</tr>
<tr>
<td>Details</td>
<td>A clickable icon that opens additional information relating to your task.</td>
<td><img src="details_icon" alt="Details" /></td>
</tr>
<tr>
<td>Done Button</td>
<td>A button that closes a confirmation screen.</td>
<td><img src="done_icon" alt="Done" /></td>
</tr>
<tr>
<td>Edit Icon</td>
<td>A clickable icon that enables the user to add and remove information on the page.</td>
<td><img src="edit_icon" alt="Edit" /></td>
</tr>
<tr>
<td>Error Message</td>
<td>Hard warning message that alerts you when there is a critical error. An error must be corrected to move forward in a process or to enable your configuration.</td>
<td><img src="error_message_icon" alt="Error Message" /></td>
</tr>
<tr>
<td>Term</td>
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</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Excel</td>
<td>A clickable icon used to view a page as an Excel file. This can be restricted using the domain Export to PDF and Excel.</td>
<td>![Excel Icon]</td>
</tr>
<tr>
<td>Filter</td>
<td>A clickable icon used to narrow down data. Clicking this icon will create a row on your report where you filter data to display from one or more columns.</td>
<td>![Filter Icon]</td>
</tr>
<tr>
<td>Guide Me Button</td>
<td>Guides you through the fields and sections of a task toward completion.</td>
<td>![Guide Me Icon]</td>
</tr>
<tr>
<td>Location, Phone, Email Icons</td>
<td>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.</td>
<td>![Location, Phone, Email Icons Icon]</td>
</tr>
<tr>
<td>More Button</td>
<td>A button that displays several additional choices based on the business process.</td>
<td>![More Button Icon]</td>
</tr>
<tr>
<td>Next Button</td>
<td>A clickable button that advances you to the next page or the next step in your tasks process.</td>
<td>![Next Button Icon]</td>
</tr>
<tr>
<td>OK Button</td>
<td>A clickable button to accept and save your changes.</td>
<td>![OK Button Icon]</td>
</tr>
<tr>
<td>Open Button</td>
<td>A clickable button to open the desired task.</td>
<td>![Open Button Icon]</td>
</tr>
<tr>
<td>View Printable Version PDF</td>
<td>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.</td>
<td>![Printable Version PDF Icon]</td>
</tr>
<tr>
<td>Add Row</td>
<td>A clickable icon to add a row to the current grid.</td>
<td>![Add Row Icon]</td>
</tr>
<tr>
<td>Progress Bar</td>
<td>The bar tracks your progress working through a task. Allowing you to move forward or return to a previous page within the task.</td>
<td>![Progress Bar Icon]</td>
</tr>
</tbody>
</table>
## Getting Started: Workday Basics

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<thead>
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<tbody>
<tr>
<td>Related Actions</td>
<td>A clickable icon that enables the user to perform additional actions for an object. Possible actions include viewing your current benefit elections, editing your contact information, and requesting time off.</td>
<td><img src="Actions.png" alt="Actions" /></td>
</tr>
<tr>
<td>Remove Button</td>
<td>A clickable icon that deletes an area.</td>
<td><img src="Remove.png" alt="Remove" /></td>
</tr>
<tr>
<td>Request Absence Button</td>
<td>A clickable button to request absence from the Request Absence worklet.</td>
<td><img src="3_Days.png" alt="3 Days - Request Absence" /></td>
</tr>
<tr>
<td>Required Field Indicator</td>
<td>A field with a red asterisk indicates you must enter a value for this field before saving or submitting the page.</td>
<td><img src="Required_Field.png" alt="Required Field" /></td>
</tr>
<tr>
<td>Save Button</td>
<td>A clickable button to save the item you may be working on.</td>
<td><img src="Save.png" alt="Save" /></td>
</tr>
<tr>
<td>Save for Later Button</td>
<td>A button that saves the item in your Inbox until action is taken.</td>
<td><img src="Save_for_Later.png" alt="Save for Later" /></td>
</tr>
<tr>
<td>Sign Out Button</td>
<td>A clickable button to sign out of the Workday system.</td>
<td><img src="Sign_Out.png" alt="Sign Out" /></td>
</tr>
<tr>
<td>Submit Button</td>
<td>A clickable button to accept and submit your changes, while advancing the business process to the next step.</td>
<td><img src="Submit.png" alt="Submit" /></td>
</tr>
</tbody>
</table>
NAVIGATE THE HOME PAGE

In Workday, data can be entered using “tasks” and viewed using “reports.” The Workday Home page displays worklets that provide access to tasks and reports. Because the Home page is highly configurable, your organization may display different worklets.

1. Click the Settings 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 a worklet from the dashboard.

5. Click the Move Row Up arrow or Move Row Down arrow to reorder the worklets on the page. To move a worklet to the first or last position, use the Move Row to Top or Move Row to Bottom arrows.

6. Click OK and Done.

COMMON WORKLET MENU

After selecting a worklet, you may see a page layout similar to the screenshot below:
Getting Started: Workday Basics

This is a common layout for worklets. There are Actions and View sections containing buttons. 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 the upper-right corner of the page. They typically identify a specific field(s) where information is missing, entered incorrectly, or in conflict with a rule established by your organization.

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

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

USE RELATED ACTIONS AND THE PROFILE ICON

The Profile icon contains links to the Home page, Inbox, and Favorites, to name a few.
Related Actions display next to an object when they can be used to access other relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (like viewing or changing your benefits). In Workday, there are multiple ways to get to the same tasks, reports, or data. Most of the actions available through Related Actions are also available through worklets or the search bar. Three common types of Related Actions can be seen in the following images:

**Manager**
**Enrique Vasquez**

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

**Ben Adams**
**Shipping & Receiving Associate**

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 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. You can shorten words to find more matches. Use longer search terms to improve the accuracy and reduce the time to return results. For example, if you are searching for the Maintain Project Worker Roles task, the search string “main pro work” returns more relevant results than the search string “Maintain Project”.

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.

CHANGE YOUR ACCOUNT PREFERENCES

You can easily change your account settings in Workday. Click the Profile icon in the top-right corner and select My Account and then select Change Preferences. Here you can change your preferences for search category (we recommend you select “All of Workday”), alerts and business process notifications.

You can also use this to switch accounts if you are a delegate.
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.

Your Inbox includes notifications of tasks, approvals, due dates, and other items sent to you as part of your organization’s business processes. You can access your Inbox using your desktop/web browser or mobile device.

DESKTOP/WEB BROWSER

VIEW YOUR INBOX

7. Click your Profile icon in the upper-right corner.
8. Click Inbox.
9. Click the Actions tab to view your business process tasks, approvals, and to dos.
10. Click the Archive tab to access the status of any business process in which you have been involved.
DELEGATE YOUR INBOX

Workday allows you to delegate your Inbox items to a colleague if you’re unable to perform the actions yourself due to time off or a leave of absence.

From the Actions tab:

1. Click More > My Delegations.
2. Click Manage Delegations.
3. Enter the Begin Date and End Date for the delegation.
4. Select a user to delegate your tasks to in the Delegate field.

   Note: If you are only delegating Inbox tasks, leave the Start On My Behalf field blank. This option is for delegating the initiation of business processes.

5. In the Do Inbox Tasks On My Behalf field, select whether to delegate all business processes, specific business processes, or none of the above.
6. Select the Retain Access to Delegated Tasks in Inbox checkbox to view and modify your Inbox while delegated.
7. Select a Delegation Rule if you are delegating a business process.
8. Click Submit. A confirmation displays. Depending on your organization's security settings, additional approvals may be required.
9. Click Done.

   Note: Select the Business Processes Allowed for Delegation tab from your My Delegations page to view which business processes you can delegate.
**WORKDAY MOBILE**

**MSU WORKDAY ACCOUNT INFORMATION**

You will need the following information while setting up your Workday mobile application.

**Company ID: montclair**
*The company ID is case sensitive.*

**Web Address:** https://wd1.myworkday.com

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**INSTALLING WORKDAY**

Get the Workday Mobile application on your device and set it up to access your account.

**ANDROID**

To install Workday on your Android device:

11. From your device, navigate to the **Google Play Store**.
12. Tap **Search** and enter **Workday**.
13. Tap **Install**.
14. Tap **Open** to launch the Workday app.
15. Tap the **Let’s get started** button
16. Complete initial setup steps, including agreeing to license agreements and entering company settings.

**IPAD AND IPHONE**

To install Workday on your iPad or iPhone:

10. From your device, navigate to the **App Store**.
11. Enter **Workday** in the search field and select **Workday** from the search results.
12. Tap **Get** and **Install**.
13. Tap **Open**, once the app has downloaded.

**Note:** There are two methods in entering your company’s credentials for the Workday native app. This document will cover the Settings method, but feel free to attempt the intuitive mobile setup instructions through the app and use these instructions as a second option. If successful, skip corresponding setup instructions in this document.
14. Tap **Settings** and enter your company’s tenant name.

15. Enter your company’s Workday web address and tap **Save**.

16. Enter your Netid and password and tap **Sign In**.

17. Tap **OK** to enable push notifications.

---

### SPOTLIGHT SEARCH (IOS ONLY)

Search for commonly used tasks in the Workday app, and they will display in the Top Hits. You must be logged in to Workday for the feature to work.

18. Tap your home screen in your iOS device and swipe right to open Spotlight Search (depending on your iOS version you may need to swipe down).

19. Search a keyword like *Time*. Suggested Workday tasks will display.

20. Select a task and you are taken to the action in Workday.
3D TOUCH (IPHONE 6S AND 6S PLUS OR NEWER)

For users with iPhone 6s and 6s Plus devices, Workday displays Quick Actions from the Home screen that can be accessed with a single press.

21. Press the Workday app icon from the home page firmly to quickly access the first four icons.

22. Select the app you’d like to use.

If you reorder the icons on the home page, Quick Actions are updated to reflect the new top four.

3D Touch learns your preferences over time, based on usage, and will display the top four most commonly used tasks.

TODAY VIEW (IOS ONLY)

IPHONE

The Today View is displayed in the Notification Center and contains helpful widgets to see how your day is shaping up. The Workday widget provides quick access to the first four icons from the Home page.

From the top of your Home page:

23. Swipe down to display the menu bar (depending on your iOS version you may need to swipe right).

24. Scroll down and click Edit.

25. Tap the plus icon next to the Workday app icon to add it to the Today View.

26. Tap Done.

If you reorder the icons on the Home page within the Workday app, the Today view is updated to reflect the new top four icons.

The Today View learns your preferences over time, based on usage, and will display the top four most commonly used tasks.
CONTACT INFORMATION

For assistance,

contact the Workday Help Desk at 973-655-7971 and select option 4

OR

send an email to Workday@montclair.edu.