











Workday Guide

Audience: All Users

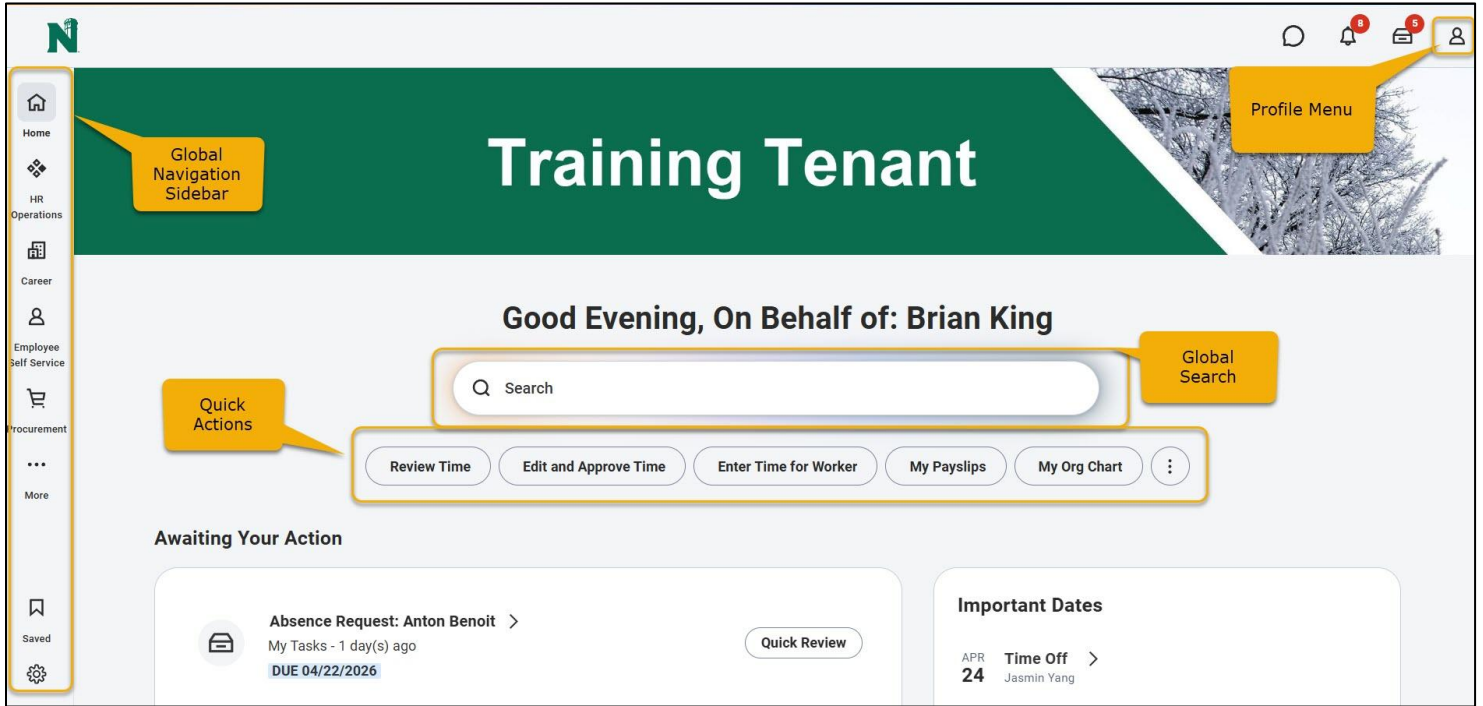
Key Terms and Icons

- **Business Process:** An automated workflow that routes tasks to designated users. Common tasks include to-dos, reviews, notifications, and approvals.
- **Home:** Your default page contains search, notifications, Inbox, and your Profile Menu.
- **Task:** A step, either standalone or in a business process, that you must complete. For example, business process steps trigger notifications or My Tasks (inbox) alerts.
- **Notifications:** Informational messages that do not require action and used to keep users aware of completed or updated business processes.
- **Saved or Pinned:** Customize your experience by saving or pinning items to the Global Navigation Sidebar.
- **Error and Alert Messages:** Identify specific fields where information is missing, entered incorrectly, or in conflict with a rule.
- **QuickTip:** Provide specific field or task-related guidance within certain tasks.
- **Reports:** Displays information stored in Workday, such as employee data or financial records.

Icon	Icon Name	Description
	Related Actions	Menu that appears next to objects providing additional actions or navigation options
	Required Field	Fields that require input. An error will appear if not completed.
	Edit	Edit information in a task
	Save	Save information in a task
	Delete	Remove a section in a task
	Undo	Undo editing information in a task
	Export to Excel	Export the report to Excel.
	Change Selection	Select different criteria to change report results.
	Filter	Filter data from each column, like Excel.
	Toggle Full Screen	View more data in full screen mode.

Navigate the Home Page

The Workday Home page features the **Global Navigation Sidebar** that displays applications and shortcuts, providing easy access to tasks and reports as you navigate through Workday.



Key Reporting Icons

Icon	Icon Name	Description
	Export to Excel	Export the report to Excel.
	Export to Worksheets	Send the report to a Workday worksheet.
	Filter	Filter data from each column, like Excel.
	Expand/Collapse Chart	View report data in chart format.
	Grid View	Show, hide, freeze, or reorder columns, like Excel.
	Toggle Full Screen	View more data in full screen mode.
	PDF	View the report as a printable PDF.
	Tag	Put workers into candidate, succession, or talent pools.
	Collapse Rows	Reduce the table's row height.
	Expand Rows	Expand the table's row height.
	Change Selection	Select different criteria to change report results.