




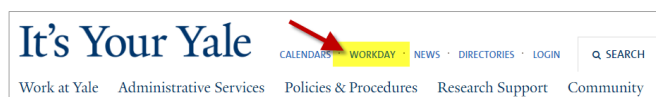
Getting Started: Login, Navigation and Tools

Topics covered in this guide:

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Login to Workday

1. Using any browser, navigate to the It's Your Yale website: <http://your.yale.edu>
2. Click the Workday link at the top of the page



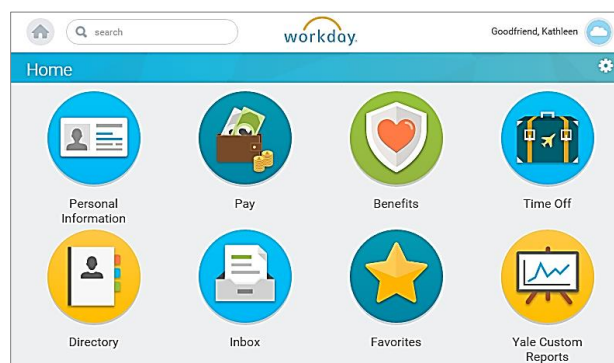
3. Enter your NetID and password into the CAS window and click: **Login** and the Workday home page opens.
4. To get started:
 - **Explore the Worklets** (icons) on the home page
 - **Or click your name** (top right), select **View Profile**, and explore the various tabs which display your personal information

Workday Home Page


The Workday Home page displays worklets (icons) that provide access to tasks (things you can do) and reports (things you can view).

- Click a worklet to see related tasks, reports, links and other information.

NOTE: Your home page may display different worklets depending on your position or responsibilities.



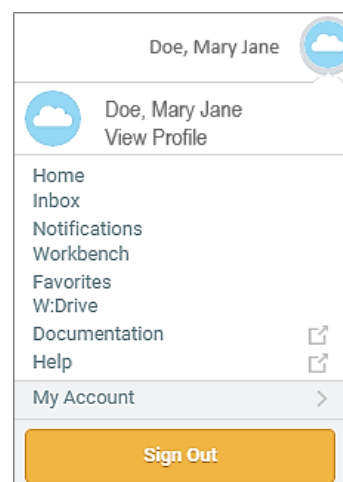
Return to Home Page

Return to the Home page at any time by clicking the Home icon  at the top-left of the screen.

Main Menu

The **main menu** contains links to the Home page, inbox, notifications, the W: drive, favorites, and other key items.

Note: Menus items will vary depending on the user's roles and security.



- **Click your name** (top right) bar to view the drop-down menu
- Click **View Profile** (under your name) to view personal information
- Click **Inbox** to see any tasks awaiting your action
- Click **Notifications** to see updates and FYIs


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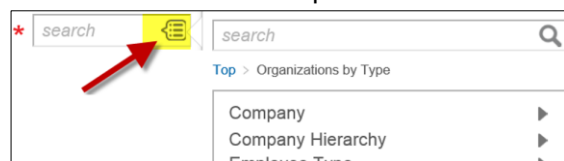
- Click **W: Drive** to see requested reports (if you have access)
- Click **Help** to access training guides and videos
- Click **Sign Out** to log out of Workday

Search Box

Use the **search box** to find people, supervisory organizations, reports, tasks, academic units and other Workday items.

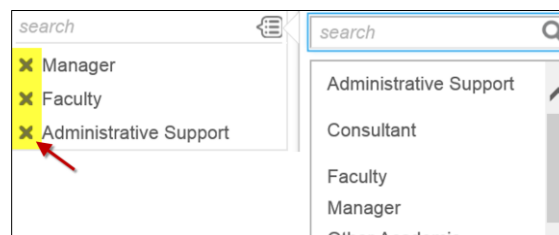
The workday search box displays predictive results:

- As you type, up to 7 items that match your entry display as a drop-down list. Pick from the drop-down or press Enter to see all items that match your entry
- If you type an entry and press Enter the results screen is divided into two sections:
 - Tasks and Reports appear separately in the grey area at the top of the list
 - All other items appear below
- Search quickly by typing partial words. For example, if searching for Juanita Suarez, type: **jua sua**
- Workday searches all types of items: tasks, employees, supervisory orgs, reports, academic units...
- Click the **Prompt icon**  to open another search box with more options.




- Some search fields allow multiple selections.
 - Click each item in the list to add it to your search items

- Click the **X** to remove a selected item




Related Actions Icon

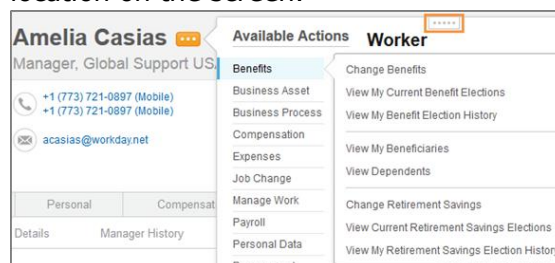
The **Related Actions** icon  displays at the end of an object and contains shortcuts to additional options available that are relevant to the object.



For example, the Related Actions icon next to your name leads to tasks and data pertaining to your employee record.

Note: At times the related actions icon doesn't appear until you mouse over it. If there is a related actions icon, it will appear to the right of the item it references. It can be either white or orange.

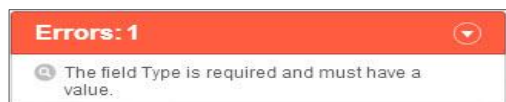
5. Click the Related Actions icon to display the **Available Actions** window.
6. Options beginning with the word "View" are reports.
7. Drag the handle icon  at the top/center of the window to move the options to another location on the screen.



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Error and Alert Messages

Error and **Alert** messages display in the upper right-hand section of the screen. They typically identify the specific field or fields where information is missing, entered incorrectly, or in conflict with an established rule.



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



Yellow **Alerts** notify you of potential problems on a screen, but do not prevent the task from being completed.





Drill Down for Information





Blue text on a Workday screen indicates interactive data.

- Click the blue text to drill down for more information.
 - Click the browser back button to return to the report.
- **OR:** Right-click the blue text and select **See in New Tab** to view the information in a separate browser tab.

Configure Worklets




Additional worklets can be added to your Home page. To change the worklets:

1. Click the Workday icon  or the home icon  at the top of any screen to return to the Home page.
2. Click the **Settings** icon  in the upper right-hand corner of the Home page. The Configure Worklets page opens.
3. Click the **Plus** icon  to add a new worklet.

4. Click the **Prompt** icon  and select from the list of existing worklets.
5. Click the **Minus** icon  to remove a worklet from the dashboard.
6. Click the **Up Arrow**  or **Down Arrow**  to reorder the worklets on the page.
7. Click **OK > Done**.

Report Icons

These icons appear at the top of most Reports. *See the Reporting Tools and Features guide for more information about reports.*

1. Click  to export the data into Excel.
2. Click  to display a filter row. Type a search word into the filter field to locate a record containing the search word.
3. Click  to turn the data into a visual chart.

Tip: Open Multiple Sessions (Multi-tasking)

You can open multiple sessions of Workday on different tabs in your browser and use each instance to perform a different task.

1. Right-click your name (top right)
2. Select: See in New Tab