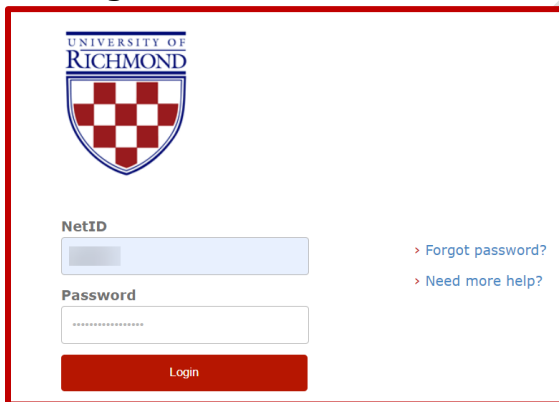# Workday @ Richmond
## MAKING YOUR DAY WORK BETTER.

## Getting Started with Workday Logging in and Navigation

This guide provides step-by-step instruction on how to log in and navigate in to Workday.

## Logging In

1. Visit the Workday log in page (placeholder).
2. Type in your **NetID** and **Password**.
3. Click **Login**.



4. Complete the two-factor authentication process. For first time logging in, you will need activate first the **DUO MFA**.
   **Note:** *There's a separate email containing a link to activate DUO MFA*

   a. Your first prompt to enroll is duo is your NetID/password (e.g. tsmith + 16 digit password)
   b. Your second prompt is your URID/dob (mm/dd/yyyy) (e.g., 45743246 + 10/20/20).
   c. You will be prompted to add a device (phone/tablet/hardware token)
   d. You will need to confirm/install the Duo App on your phone.
   e. You will be given a QR code on your laptop browser - use the Duo App to add an account and scan the QR code.

5. Select **Approve** button.
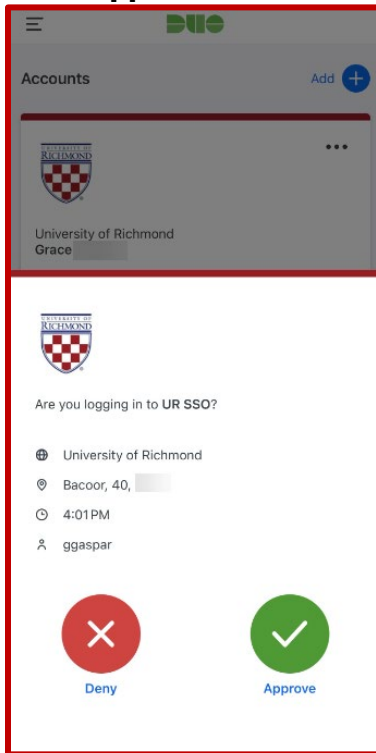


# Workday Day Navigation

This guide provides helpful ways to navigate Workday in these areas:

## Home Page

The Workday home page allows you to quickly navigate the system, access information, and complete tasks.  From the home page you can:

- Complete items **Awaiting Your Action**.
- Access **Applications** and associated **Quick Tasks** you use most often.
- **Search** Workday to launch/initiate tasks and to find information.
- Access your **Inbox**.
- View **Notifications**.
- Stay up to date with **Announcements**.
- View your **Worker Profile**
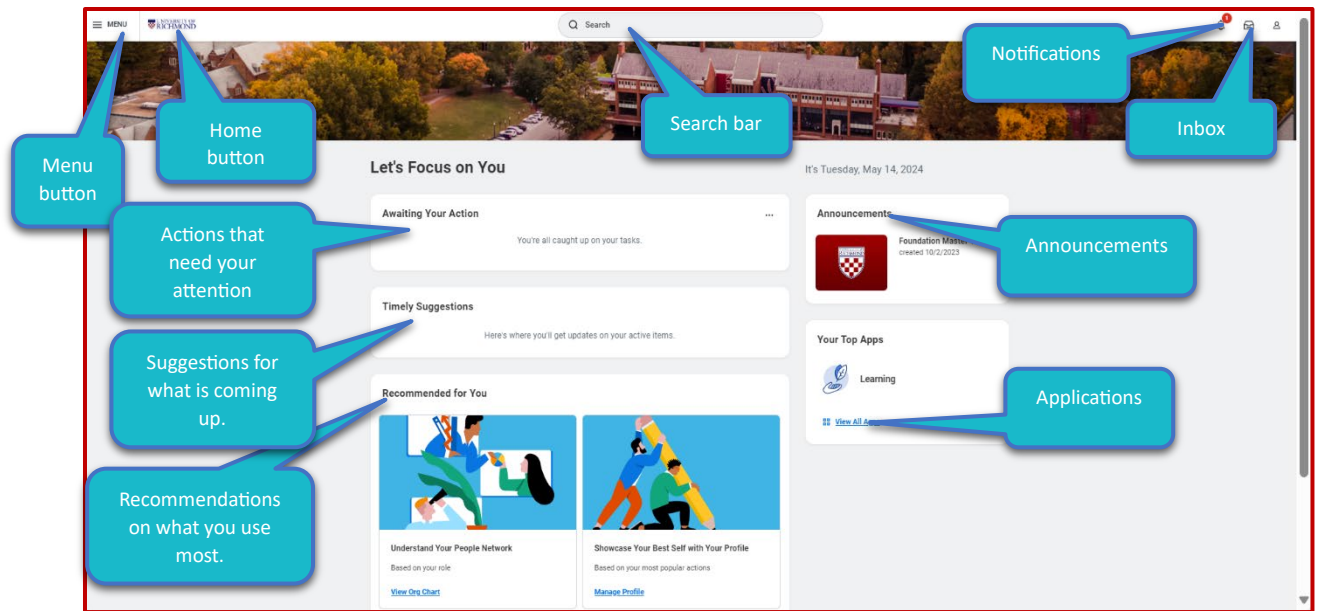
## Menu

The **Menu** button in the left corner allows you to quickly access applications and shortcuts in Workday.
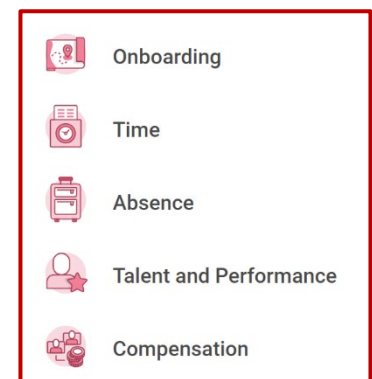
## Home

You can return to the home page at any time by clicking the Company logo in the top left corner . The logo serves as the **Home** button.

## Applications

**Applications** are available through a link on the Workday home page as well as through the **Menu** button. Applications provide access to tasks and information such as **Onboarding**, **Time** entry, **Absence**, or **Compensation**.

Within each application, there are typically two panels:

- **Actions**/**Change** – Quick links to relevant tasks/actions
- **View** – Quick links to relevant information

**Quick Tasks** are listed above the applications link to allow you to easily get to the applications that you use most often.

# Inbox Actions

To see inbox items that require your attention:

1. From the Workday home page, click an item under **Awaiting Your Action** or click the inbox icon in the top right of the screen.
2. To manage your inbox items, click the **Actions** tab.
   - Click **Viewing** > **All**/**Favorites**/**Overdue items**/**Edit Filters**
   - Click **Sort by** > **Newest**/**Oldest**/**Due Soonest on Top**
3. To work on a task in your inbox, click the task.
   **Note**: *When you want to return to the home page, click the UR logo in the upper left corner.*
   - ⓘ An action remains in an inbox until the action is completed.

# Inbox Archive

To see completed or previously initiated tasks, including approvals:

1. Click the inbox icon in the top right of the screen.
2. Click the **Archive** tab.
   - Click **Sort by** > **Newest on Top**/**Oldest on Top**
   - To see archived items over 30 days old, click the rightmost down-arrow then **View More Processes**.
   **Note:** *When you want to return to the home page, click the UR logo in the upper left corner.*

# Notification

Notifications alert you to important information but do not require action.
1. To view **Notifications**, click the bell icon in the top right corner of the screen.
2. To manage your notifications:
   - Click **Viewing** > **All**/**Unread**
   - Click **Sort By** > **Newest on Top**/**Oldest on Top**.

# Search Bar

The search bar is a quick method to find data, people, or tasks.

When using search, less is more. Try searching on a partial word, or partial name. Workday does not recognize misspelled words.
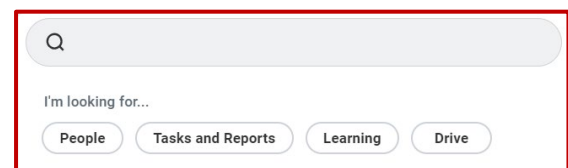
To filter your search after a search attempt, select from the list of **Categories**, e.g., All of Workday. You can also filter in the initial search by clicking on the related button for People, Tasks and Reports or Drive

# Worker Profile

Your Worker Profile contains detailed information such as your personal information, compensation, job title, etc.

1. To access your worker profile, click the cloud icon (or your photo) in the upper right corner of the screen.
2. Click **View Profile**.
3. To see options, click **Actions** then hover over an action, e.g., Personal Data.

You can also view another worker's profile to find useful information such as work contact details and team organizational charts.

1. Type a name into the search bar.
2. Click the name.
3. Click **Email** to view their work contact details.
4. Click **Team** to view their team organization chart.
   - Scroll to view the entire organization.
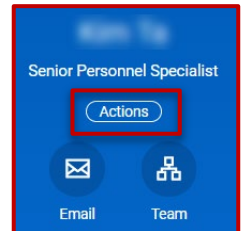
# Navigations Tips

Below is a list of useful icons you can use in Workday:

| Icon | Description | Icon | Description |
|------|-------------|------|-------------|
| | **Related Actions** opens a menu of options | | **Options** to perform actions related to the page |
| | **Edit** | | **Edit** |
| **\*** | **Required field** | | **Save changes** |
| | **Favorite** | | **Export to excel** |
| | **Print** | | **Expand** or **full screen** |
| | **Filter** | | **Grid view** |
| | **List view** | | |

## Error and Alert Messages

Error and alert messages appear when updating information:

- **Error** messages are red and indicate that the task cannot complete until the error is resolved.
- **Alert** messages are orange and notify you of important information but do not prevent the task from being completed.