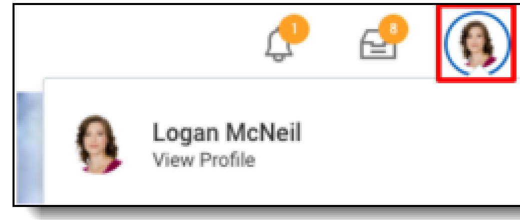
Tools and Navigation

This Quick Reference Guide will highlight key areas of the Workday system such as, the **Related Actions** and **Profile** icon, **Error** and **Alert** messages, and **Guided Tours**. You can also use this document to guide you through step by step instructions on how to complete tasks that are relevant to: **Related Actions** and the **Profile** Icon, **Error** and **Alerts** messages, Guided Tours, Changing Account Settings and How to Configure Worklets.

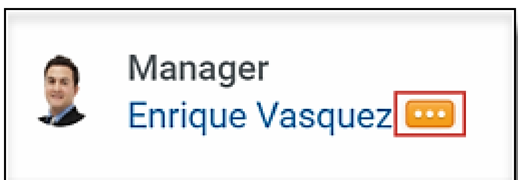
Related Actions and Profile Icon

The **Profile** icon contains links to the Home page, My Account, and Favorites. Workday Documentation can also be accessed by clicking the Documentation link. Click your **Profile** icon in the upper right corner to access your profile.

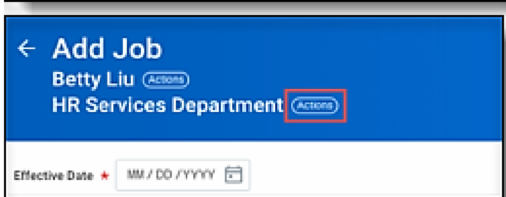


Related Actions display next to an object when they can be used to access other relevant actions. For example, the Related Actions next to your name accesses tasks, reports, and data related to your worker record (like changing your emergency contacts).

There are three common types of Related Actions that can be seen in the following images:

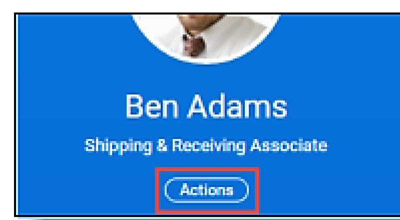


Related Actions may appear when hovering your cursor next to a business object or link.



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

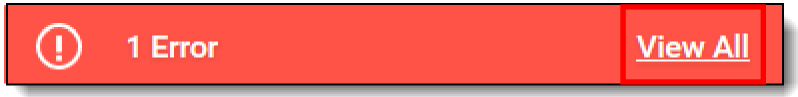
Related Actions may appear when viewing tasks and reports in the header.



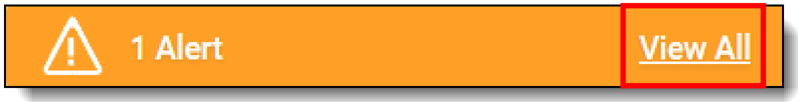
Additional Information: For more in-depth training, with step by step instructions and videos, visit iLearn Oregon. For system issues, please contact Workday.help@oregon.gov

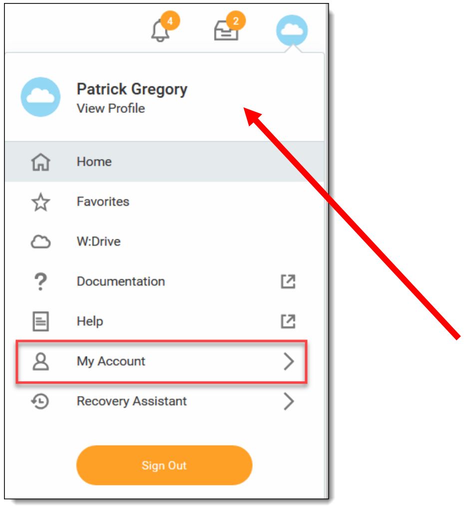
Error and Alert Messages

Error messages display in red and can be clicked on to view error explanations. When an error message is received, you will not be able to continue with your task until the error is corrected. Clicking **View All** will display the error message, identifying specific field(s) where information is missing, entered incorrectly, or in conflict with a rule.



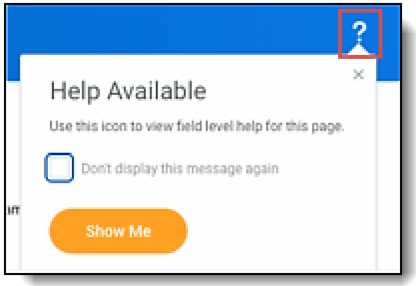
Alert messages display in orange and can also be clicked on to view alert notifications. Alerts notify you of potential problems on a screen, but do not prevent the task from being completed. By clicking **View All**, the alert will display the location of missing or problematic information within the task, report, or business process.





Guided Tours

Product tours provide contextual and informative text to guide you through a task with field-level tool tips. This text is only available for certain tasks. To activate a product tour, click the question mark in the top-right corner.



Change Account Settings

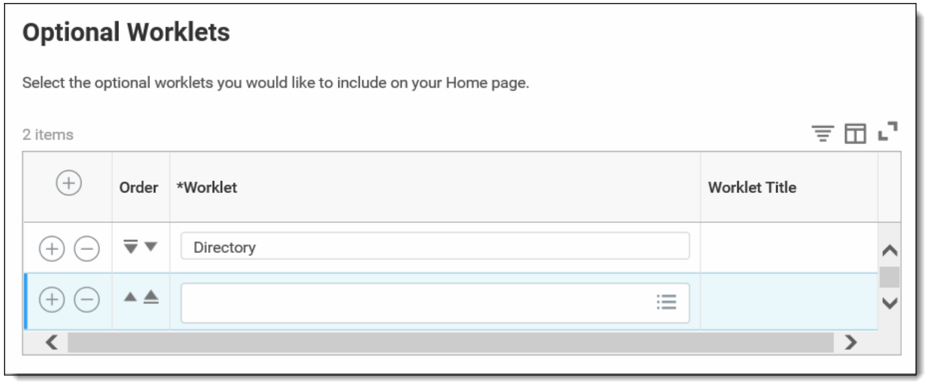
You can easily change your account settings in Workday. Click the **Profile** icon in the right corner and then select **My Account**. From here, you can change your password, account preferences, and manage your account's challenge questions. You can also do this to switch accounts if you are a delegate.

Additional Information: For more in-depth training, with step by step instructions and videos, visit [iLearn Oregon](). For system issues, please contact [Workday.help@oregon.gov]()

Manage Worklets

Additional worklets can be added to your Home screen.

Step 1: From your Home page, click the **Settings** icon in the upper right corner. The Configure Worklets screen displays.



Step 2: Under *Optional Worklets*, click the **Add Row** icon to add a new worklet.

Step 3: Click the **Prompt** icon to select from the list of existing worklets.

Step 4: Click the **Remove Row** icon to remove a worklet from the dashboard.

Step 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.

Step 6: Click **OK** and **Done**.