

Navigate Workday for iPad



Note: The Workday mobile web user experience now closely mirrors the desktop web user experience. The design of mobile web will differ due to responsive design. This change does not impact the mobile app experience.

From the Home page, you can swipe up and down to scroll through available worklets. Use the Settings  icon to navigate your app settings:

1. Select a menu item for more information.
2. Tap **Close** to return to the Home page.

Customize Your Home Page

You can rearrange the order of worklets on your Home page.

3. Touch and drag icons to their desired position. The Edit Home page menu appears at the top of the screen.
4. Rearrange icons as desired and select your desired background color.
5. Tap **Save**.

View Your Inbox

The Inbox is your personal activity stream. It includes Actions and Notifications such as Approvals, To Dos, and status notifications that are sent to you by your organization's business processes. You can filter Actions by clicking filter pull-down.

From the Inbox worklet:

1. Swipe right to reveal Actions and Notifications.
2. Tap the **Actions** or **Notifications** tab to access the corresponding information.
3. Select an item to view more details.

Access Your Workday Drive (W:Drive)

The Workday drive (W:Drive) is a virtual drive where you can store your scheduled and shared reports and access them from your iPhone and iPad.

From the Home page:

1. Tap the **W:Drive** worklet.
2. Tap **More Reports** and filter your search by Business Object or Report Tags. You can also search for reports created within the last "X" number of days.
3. Tap **Done**.

Change Your Password

From the Home page:

1. Tap the **Settings** icon.
2. Tap **Change Password**.
3. Enter your Current and New Password.
4. Verify your New Password.
5. Tap **Done** to apply the change.

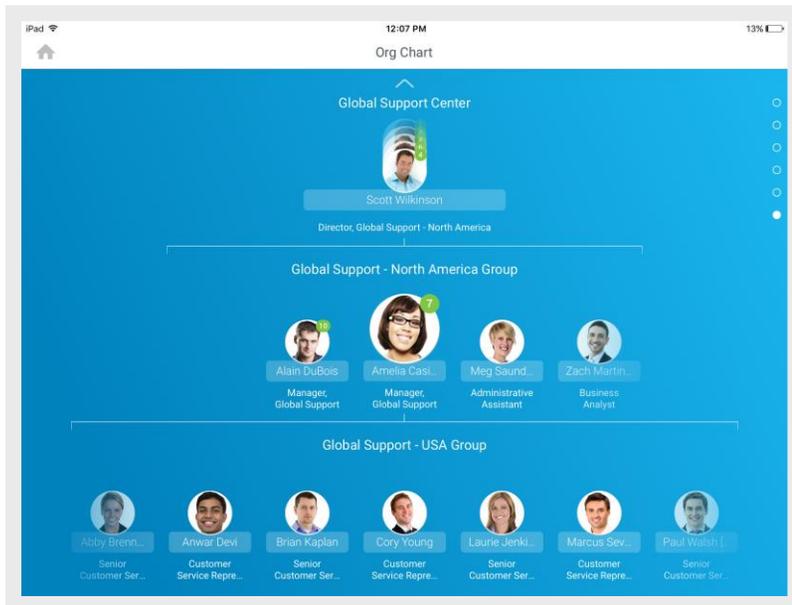
Sign Out

From the Home page:

1. Tap the **Settings** icon.
2. Tap **Sign Out**.

Navigate the Org Chart

The Org Chart helps you identify where you and others fit into the overall structure of your organization. It displays your position within the department, as well as those of your teammates. Within the Org Chart, you can navigate the structure of your department and company by tapping on individuals or groups.



From the Org Chart worklet:

1. Scroll up or down to see how groups and individuals are connected within the organization.
2. Tap an individual's image to view their Profile page.
3. Tap the **Back** arrow  to return to the chart.

Search for Employees by Name

From the Home page:

1. Tap the **Search** icon.
2. Enter the name of the employee you want to find in the Search field. The results display.
3. Select the search result that matches your search. The individual's profile page displays.
4. Tap **Overview** to see information about an individual's skills, experience, and education. You can continue to tap across the other profile categories to review Personal Notes, Feedback, and Contact Information for this individual.
5. Tap the **Related Actions**  to see additional actions you can perform from this screen.

Update Your Profile Photo

From your profile:

1. Tap the **Picture** above your name.
2. Select **Camera** to take a new photo. Optionally, you can select **Choose from Library** to use an existing photo from your iPad.

Attachments can be imported from supported native apps using the **Import Attachment** option.

3. Take the photo.
4. Tap **Retake** or **Use Photo** when you are satisfied with the image you captured. A submission screen confirms that your photo has been sent for approval.

Change Your Contact Information

From the Home page:

1. Tap your **profile photo** to open your Profile page.
2. Tap the **Related Actions**.
3. Tap **Personal**. The Personal menu displays.
4. Select **Change Contact Information**. The Change Contact Information window displays.
5. Tap the **Edit** icon  next to the information you want to change, and make your edits.
6. Tap **Done** to close the window.
7. Tap **Submit**. A confirmation page displays.

Enter Expense and Submit Expense Report

Use the Expenses worklet to track expenses, upload receipts, and submit expense reports.

From the Expenses worklet:

1. Tap **New Expense**.
2. Tap the **Camera** icon to take a photo or choose an existing photo of your receipt.
3. Enter an Amount, Date, and any other supporting information for the expense.
4. Tap **Done**.

Repeat previous steps to add any other expense items you want to report. When all expense items are added, you can submit an expense report from the Expense worklet:

5. Tap **New Expense Report**.
6. Include the Company, Cost Center, and Region.
7. Tap the **Additional Worktags** prompt. Add information your organization may require, like Location and Project.
8. To add a Project, tap **Project** from the Additional Worktags prompt.
9. Select your **Project** > **back arrow** icon > **back arrow** icon > **Close**.



Note: The amount of projects you can choose for your expense report may vary per your organization's configuration. An inactive (closed) project will not appear in available projects.

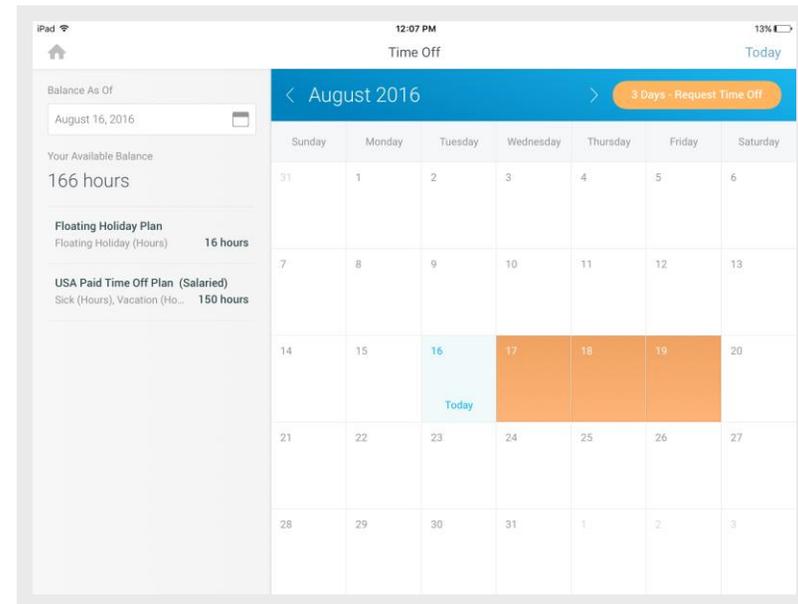
10. Tap **Done**.
11. Swipe right to Tap **Add Expense**.
12. Tap **Existing Expenses**. You can also choose to add more expenses in this step by tapping **New Expense**.

13. Choose the pre-existing expenses you want to include in the report by tapping the **checkmark** next to each expense item you have saved.
14. Tap **Done**.
15. Tap **Review**.
16. Review your expense items for accuracy and correct any errors, then tap **Submit**. A confirmation screen shows your expense report has been routed for approval.

Request Time Off

The Time Off worklet displays your time off balances and time off details. You can also use it to request time off.

1. Tap the **Time Off** worklet.
2. Select the days you want to request for time off. Tap a highlighted day to deselect it.



3. Tap **Request Time Off**.
4. Select the **Time Off Type**. The Review Time Off screen displays.
5. (Optional) Tap a day to adjust the number of hours you request off each day. If necessary, you can enter a comment with this change. Tap **Delete Day** if you need to remove a day from this screen.
6. Tap **Submit**. A confirmation displays. Your request is routed to your manager for review and approval.

Enter Time Worked

Use the Time Tracking worklet to enter time or to check in/out.

From the Time Tracking worklet:

1. Tap **Enter Time**.

2. Tap a day of the week for your time entry. You can also use the Auto-fill feature to automatically fill out your time based on the time you entered in a previous week.
3. Confirm the **Time Type**.
4. If selecting a Project, select the **Time Type** prompt: ☰ > **Project**, **Project Phase**, and/or **Project Task** (if required).



Note: A worker must be assigned to an active project in order to bill time against it. A worker can add the project, project phase, and/or project task based on your organization's configuration and requirements. You may be able to use the Auto-fill feature from the Enter button if your time is identical to the prior week.

5. (Hourly) Tap and select the **In** and **Out** time and your **Reason** from the prompts.
6. Select any additional information your organization requires, including Cost Center, Job Profile, Waived Meal/Break, and Division.
7. (Non-hourly) Tap the **Hours** field, and select the amount of time you worked.
8. Enter any additional information.
9. Tap **OK**. If incorrect, an error message will display.
10. Repeat the process to enter additional blocks of time for the day/week, as needed.
11. Tap **Submit** when you are ready to send your hours for approval.
12. Tap **Submit** to confirm that the reported hours are accurate and to authorize payment. You will see any approval that is needed once submitted.

Enter Time Worked (Hourly Employees)

From the Home page:

1. Tap the **Time Tracking** worklet.
2. Tap **Enter Time**. The Enter Time calendar displays.
3. Select the Time Type.
4. If selecting a Project, select the **Time Type** prompt: ☰ > **Project**, **Project Phase**, and/or **Project Task** (if required).



Note: A worker must be assigned to an active project in order to bill time against it. A worker can add the project, project phase, and/or project task based on your organization's configuration and requirements. You may be able to use the Auto-fill feature from the Enter button if your time is identical to the prior week.

5. Tap the **Add Row** icon for a day of the week to enter a time block. The Enter Time window displays.
6. Tap the **In** field and select the time you started working.
7. Tap the **Out** field and select the time you stopped working.
8. Enter any additional required information.
9. Tap **OK**.
10. Repeat the process to enter additional blocks of time for the day/week, as needed.
11. Tap **Submit**. The details of your entered time displays for your review. You may also provide any comments.

12. Tap **Submit** again to send your hours for approval. Any issues or warnings regarding the entered time will display.

Add Personal Notes

Use Personal Notes to store important information about a worker. Only you will be able to see the personal note.

From a worker's Profile page:

1. Tap **Personal Notes**.
2. Tap **Add**. The Add Note screen displays.
3. Type your note.
4. Tap **Done**.

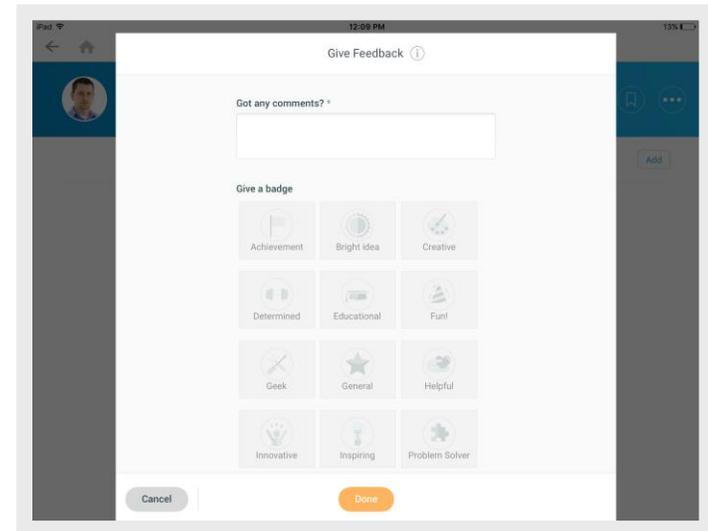
You can view the Personal Note any time from the individual's Profile page.

Provide Feedback

Anyone can provide feedback. With feedback, you can share your experiences or thoughts about another individual with others in your organization.

From an individual's Profile page:

1. Tap **Feedback**.
2. Tap **Add**.
3. Enter your comments.



4. Select a badge that best represents your comment.
5. Tap **Done**. Your feedback displays on the individual's Profile page for everyone to view.

Managing Notebooks

Notebooks provide users with an easy way to group worker profiles and reports for quick reference. You can have up to 10 active notebooks.

Create a Notebook

From within a report or worker profile:

1. Tap the **Notebooks** icon .

2. Tap **Create** to add this item to a new Notebook. Or, select a Notebook from the list to add to an existing Notebook.
3. Enter a name for your Untitled Notebook. The Notebook name appears in the list of Notebooks with a checkmark confirming that this report or worker profile is included in this notebook.

Remove an item

1. Tap the **Notebooks** icon.
2. Tap the **checkmark** to deselect the item from a Notebook or multiple Notebooks.

Share a Notebook

From the Notebooks worklet:

1. Tap the **Share** icon  under a Notebook.
2. Tap the **Share With** field to select the workers you want to share your notebook with, or tap **Search** to search for a specific worker's name, or browse the lists below. Individuals will need to have the appropriate security permissions to access the content in the shared notebook.
3. Tap the **checkmark** next to the worker's name.
4. Tap **Done**.

Review Talent Cards

A Talent Card is a one-page summary about a worker that includes information such as Job Profile History, Work Experience, Languages,

Awards, Training, Performance Ratings, Succession Plans, etc. Use it for discussions, planning, and more.

From the Team worklet:

1. Select an employee. Their profile page displays.
2. Tap **Overview**.
3. Scroll down to **Talent & Performance**.
4. Tap **View Talent Card**. If the employee does not have a Talent Card, tap **Load Talent Card**.



Note: You can print a Talent Card if you have access to an AirPrint printer.

Review Dashboards for Managers

From the Home page, tap the **Dashboards** worklet. From here, you can access all of the reports you access from the Workday desktop application.

My Team for Managers

From the Home page:

1. Tap the **Team** worklet. Your direct reports display.
2. Tap a direct report to display their profile.
3. Tap the **Related Actions** to access any of the following:

Field	Description
Personal	Change Contact Information.
Talent & Performance	Add a Personal Note, Get Feedback, or Give Feedback.
Job	Change Job, Change Job Location, or Terminate
Compensation	Request Compensation Changes, One-Time Payments, or Stock Grants
Save to Contacts	Add contact information to your iPad contacts.

4. Tap the **Back** arrow in the top-left corner to return to the Team page. From the menu that appears below your name, select any of the following:

Field	Description
Team Members	The default setting showing your direct reports.
Stats	Cross-comparison view of team by business title, retention, loss impact, years of service, and more
Calendar	Team events such as birthdays, anniversaries, and scheduled time off
Compensation	Reports and resources for reviewing team compensation information
Talent & Performance	Reports and resources for reviewing talent and performance information
Employee Reviews	Performance data access by employee and status in the evaluation process. Review of completed performance reviews