

Workday®: Best Practices for Building With The End-User Journey in Mind

Starting the Process

There are three primary ways that users start processes in Workday®:

1. From the Search Box (preferred method)
2. From the homepage
3. From the Inbox (not recommended)

Pro-Tip: *We recommend starting processes from the Search Box when possible.*

Error Looping

Workday® has great error handling, so you do not need to add complex logic to handle errors. Instead, you can use a *Wait For* condition to assess when the user reaches the next page.

Note: in rare cases it might make the balloon to disappear. In that case we do use an Error Handling Group.

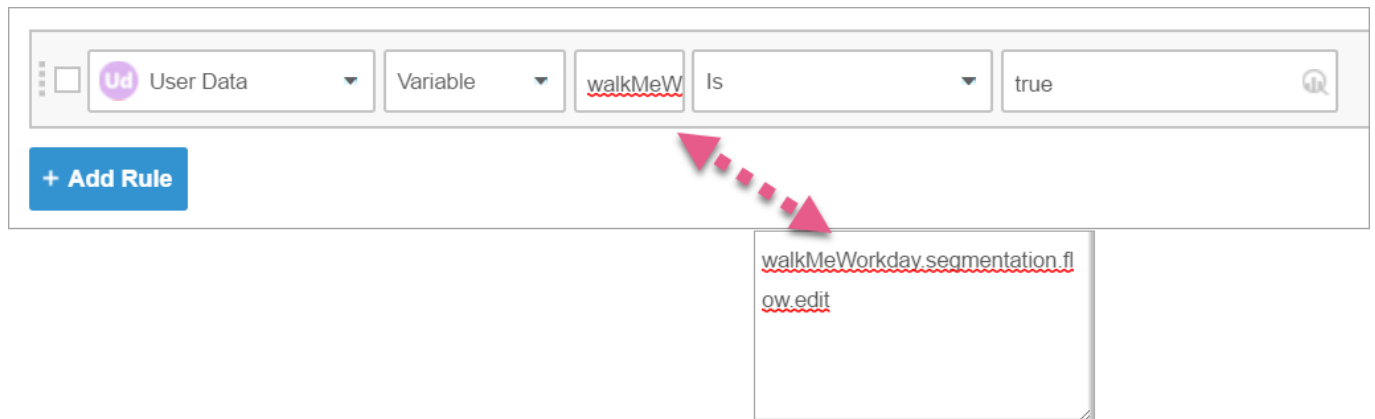
Twins Method — Forms

Forms in Workday® have two modes:

1. **View mode**
2. **Edit mode**

You can identify their mode according to a page identifier - `walkMeWorkday.segmentation.flow.edit`

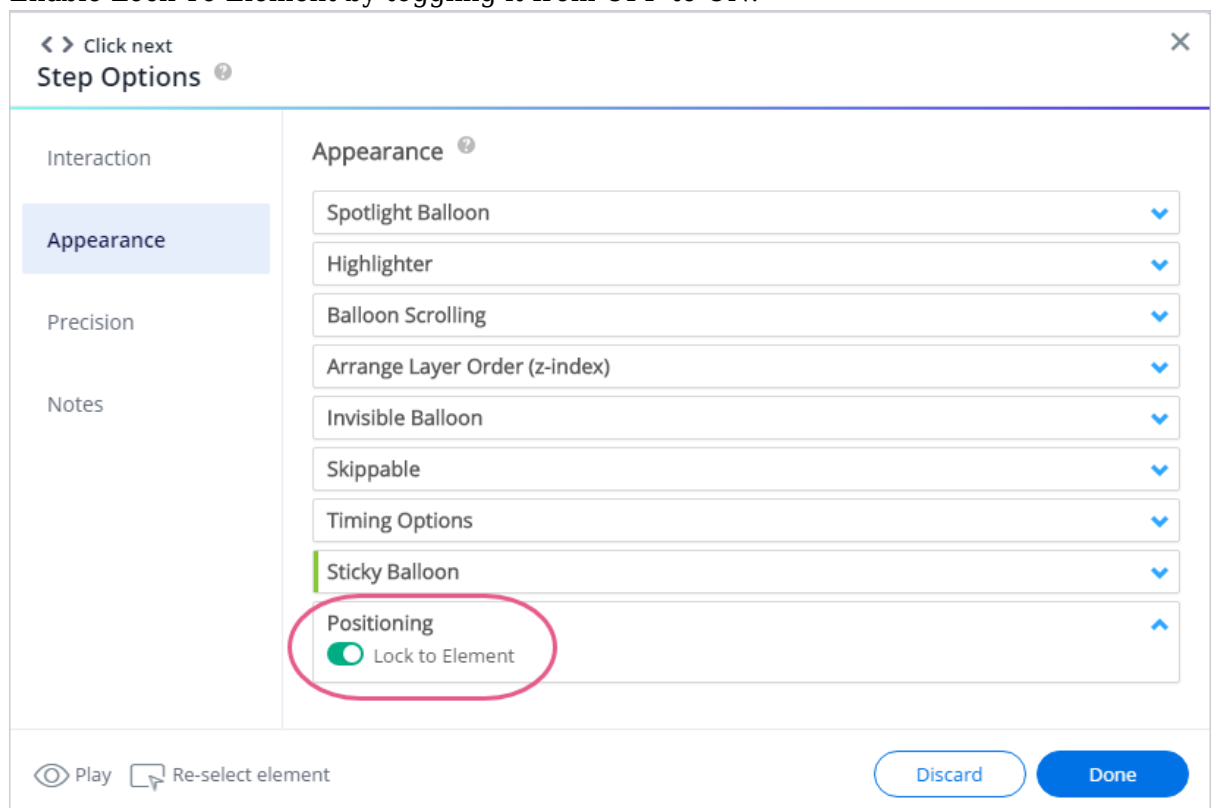
This is a variable we use to identify whether a form is in *Edit* mode or *View* mode. This is how we use it:



Pro-Tip: Elements in a form change according to the forms' mode. For this reason, we usually try to avoid building balloons in a form, and opt to use SmartTips instead.

If you have to build inside a form, please use the following best practice, dubbed by WalkMe as the "Twins Method:"

1. Capture the outer element (the element you select without entering the form), and define it as follows:
 1. Enable Lock To Element by toggling it from OFF to ON:



2. Set the precision to *High*:

Click SUPPORT

Step Options

Interaction

Appearance

Precision

Notes

Precision

Element Grade

Level:

Type

Default

Identify by Text

support

jQuery Selector

Bypass

Ignore Text

Ignore ID

Ignore Position

Precision Level

Level: High

Play

Re-select element

Discard

Done

3. Don't enable "Strong Pin."
2. Capture the inner element (the element present after clicking the form) and define it as follows:
 1. Capture the input element along with the name of the field:

Where will this person be located after this change? *

X New York

Do you want to use the n

Click here

Click to add text

+ Add Note

Continue on:

Next

T