Install and Use Workday Digital Assist Overview

This Quick Reference Guide (QRG) is designed to walk **All Users** through installing and using Workday Digital Assist. Workday Digital Assist is an add-on extension that allows you to access up-to-date Quick Reference Guides and helpful Workday process tips. By the end of this QRG, you will be able to determine if you already have the Workday Digital Assist extension, install the Workday Digital Assist extension if you do not already have it, and utilize the Workday Digital Assist assistance features.
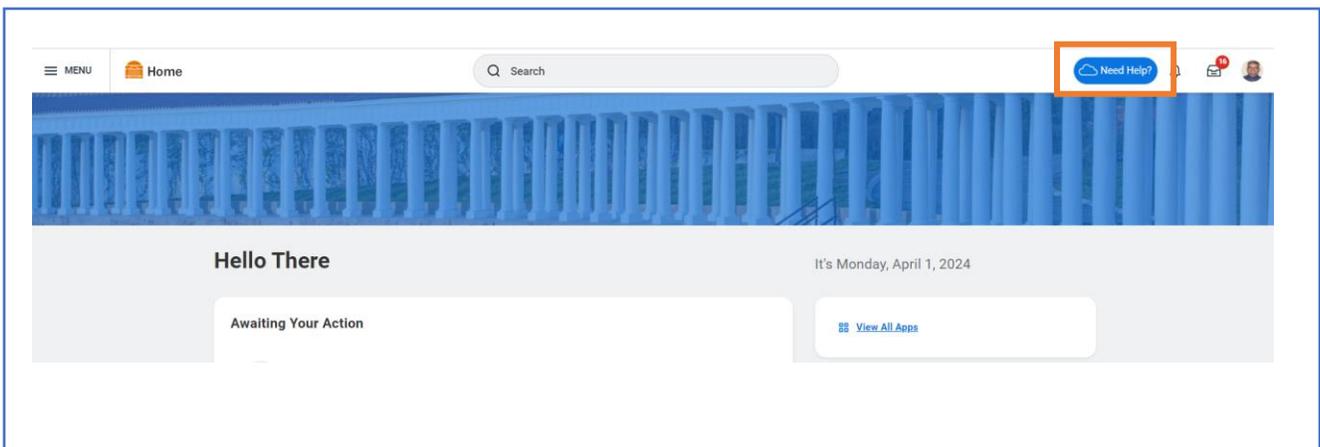
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Procedure: Determine if the Workday Digital Assist extension is installed

On the **Workday Home** screen:

1. Look to see if you have the blue **Need Help?** icon on your Workday home screen. If the **Need Help?** icon is present, the Workday Digital Assist extension is already installed on your computer. If it is not present, follow the next procedure to install the extension onto your computer.
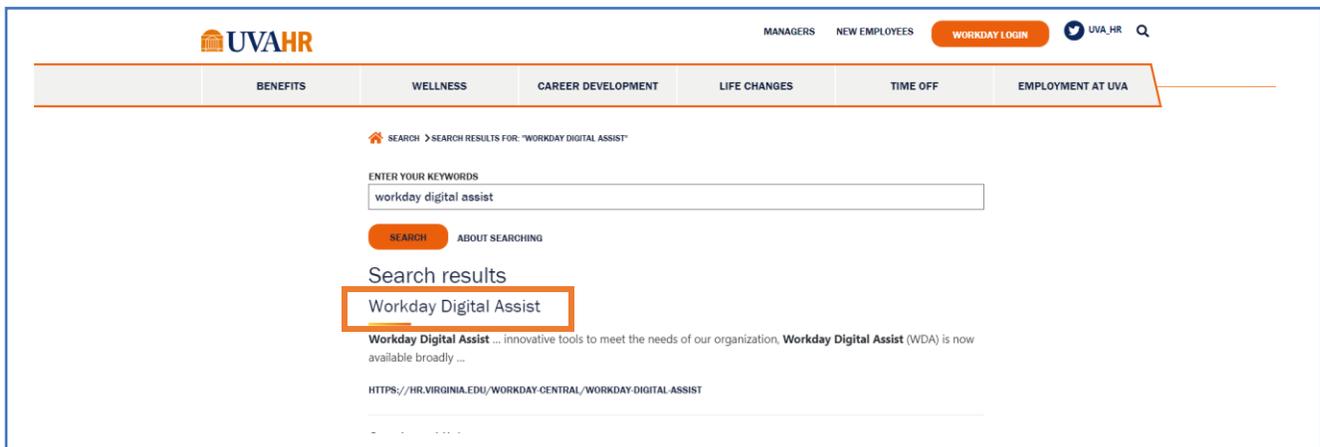
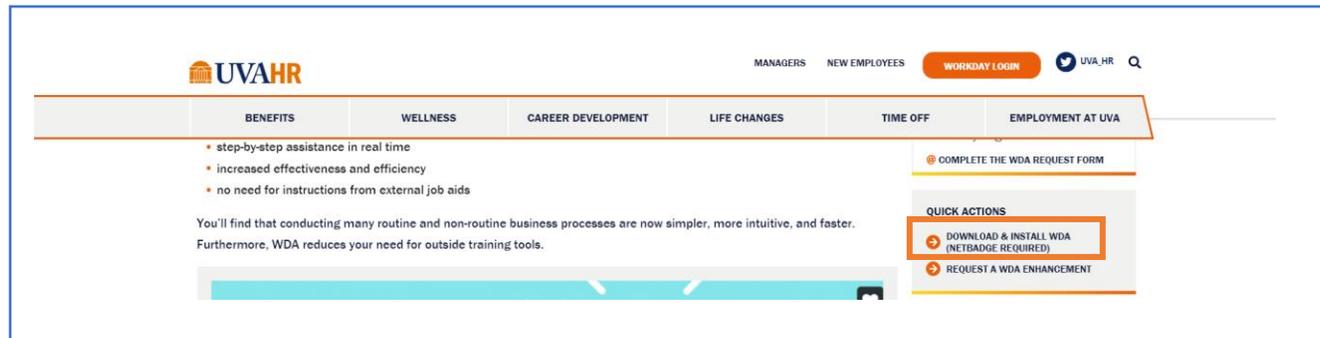## Procedure: Install the Workday Digital Assist extension

1. In a separate browser, go to the [UVA HR website](#).
2. Click on magnifying glass in the upper right portion of the screen.

3. Type Workday Digital Assist into the Search field.
4. Select Workday Digital Assist from the Search results.

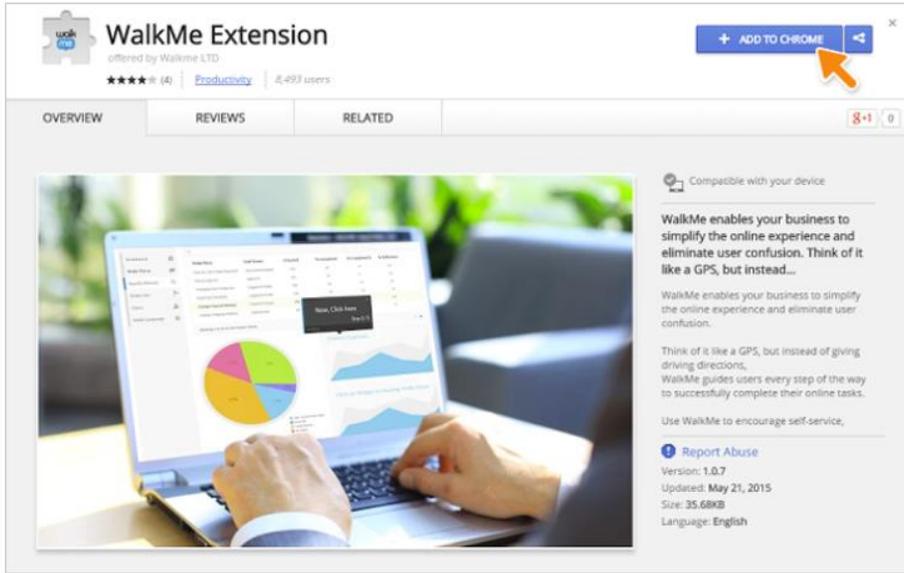5. Click on Download & Install WDA (Netbadge Required) in the Quick Actions section on the right.

6. Follow the instructions on the WalkMe Extension screen:
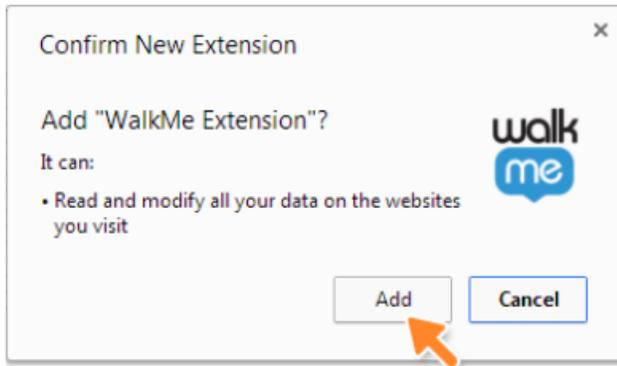   - Click Download Extension

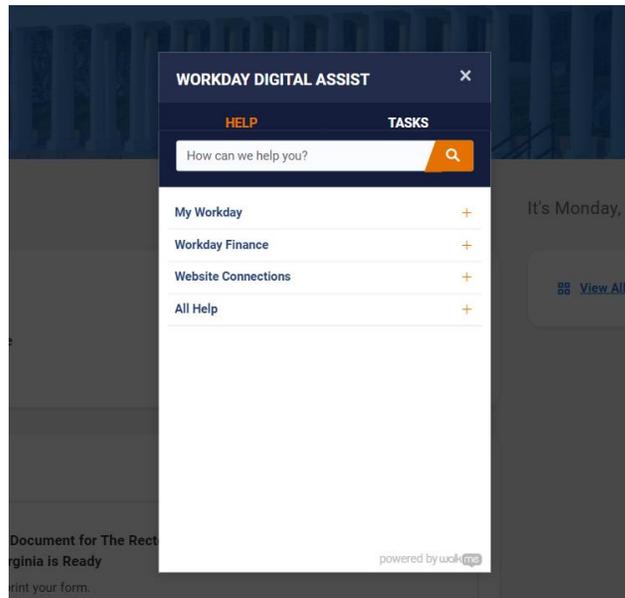- Click "+Add to Chrome"

- Click Add

7. Return to your Workday screen and refresh the screen. The **Need Help?** icon should appear.
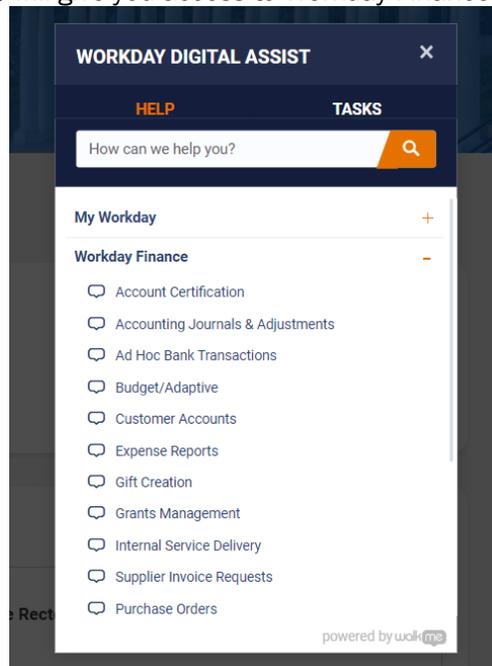
Procedure: Utilize the Workday Digital Assist features

<u>Quick Reference Guides</u>

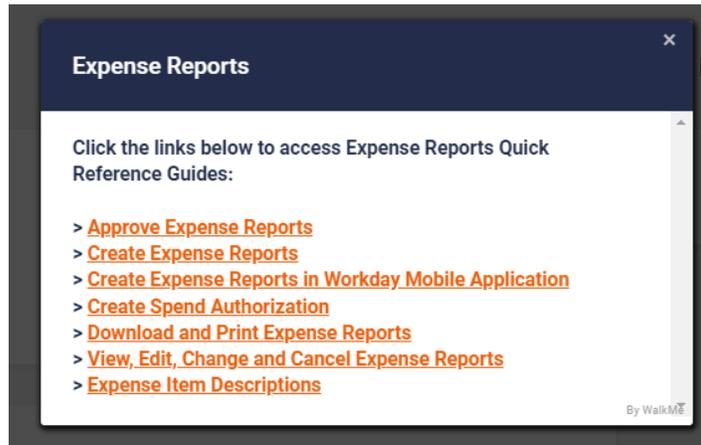1. Click on the **Need Help?** icon. The Workday Digital Assist menu will appear.

- **My Workday** will give you access to UVA HR functionality Quick Reference Guides.
- **Workday Finance** will give you access to Workday Finance Quick Reference Guides.

2. Click on an individual topic area to see available Quick Reference Guides, for example, Expense Reports:

Expense Reports

Click the links below to access Expense Reports Quick Reference Guides:

> **Approve Expense Reports**
> **Create Expense Reports**
> **Create Expense Reports in Workday Mobile Application**
> **Create Spend Authorization**
> **Download and Print Expense Reports**
> **View, Edit, Change and Cancel Expense Reports**
> **Expense Item Descriptions**

By WalkMe

Workday Process Tips

- The Workday Digital Assist extension also gives you access to the helpful quick tip icons that have been put in place on various Workday task screens. Clicking on the **?** icons will provide you with a helpful tip on that field.

Connect to Supplier Website

Requester	Jack S Jensen
Company	The Rector & Visitors of the University of Virginia
Currency	USD
Requisition Type	Choose Standard unless you need a contract signed or central buyer's assistance
Deliver-To	Carruthers Hall > Floor 01 > 149A OFFICE
Ship-To	1001 Emmet St N Charlottesville, VA 22903-4833 United States of America
Gift	
Grant	
Designated	
Project	