

# Workday Help: Create Cases, Create Help Articles, Access Help Cases Workspace

## Purpose

To guide employees, managers, and case administrators through the use of the Workday Help module for submitting support cases, managing help articles, and accessing the Help Cases Workspace.

## Overview

The **Workday Help** module is a centralized support system that enables users to:

- Submit and track help cases
- Access HR and Workday instructional articles
- Manage and resolve cases efficiently
- Create and publish help articles

This module streamlines issue resolution and ensures quick access to support resources.

## Step-by-Step Instructions

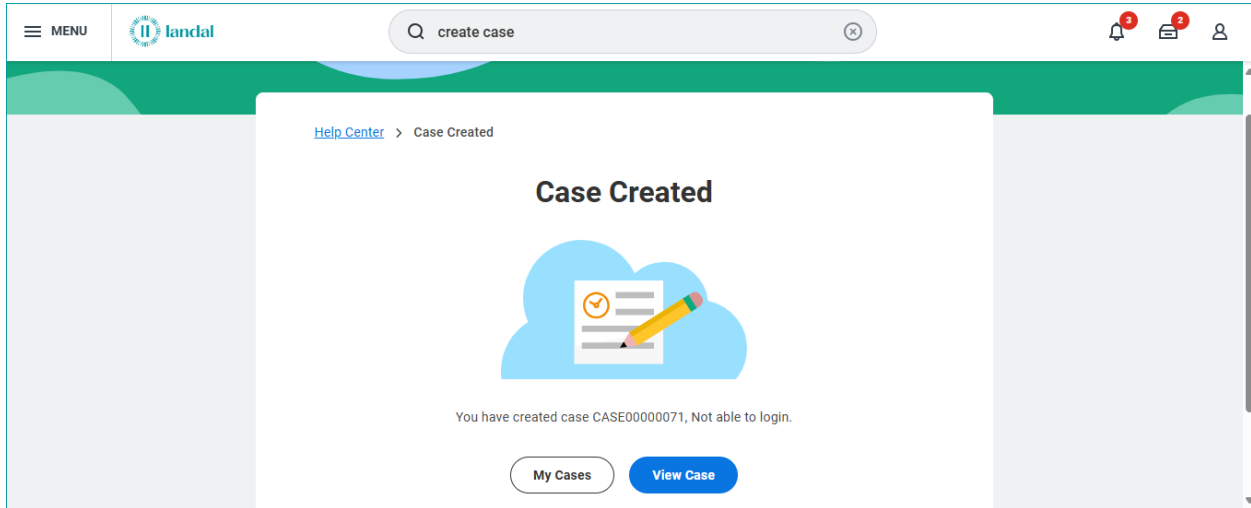
### Part 1: Create a Help Case (for Self)

#### Step 1: Access Help Center

- Click **Help** from the left-side menu on the homepage.
- Alternatively, type **Create Case** in the **Search bar**.

#### Step 2: Fill in Case Details

- Enter:
  - **Case Type**
  - **Case Title**
  - **Detailed Description**
- Optionally, add an **attachment** (e.g., screenshot).
- Click **Create Case**.



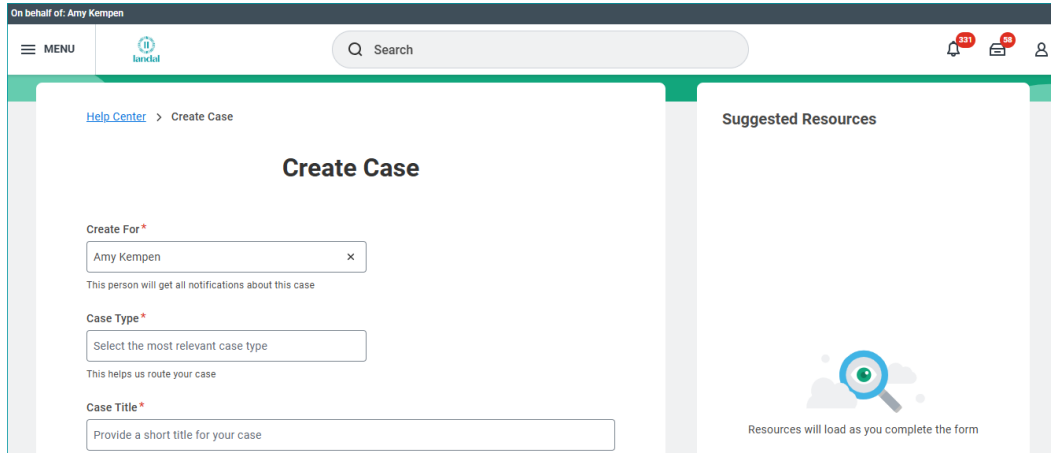
## Part 2: Create a Help Case (for Employee)

### Step 1: Access Help Center

- Click **Help** from the left-side menu or use the **Search bar**.

### Step 2: Fill in Case Details

- Enter:
  - **Create For** (select employee)
  - **Case Type**
  - **Case Title**
  - **Detailed Description**
- Optionally, add an **attachment**.
- Click **Create Case**.



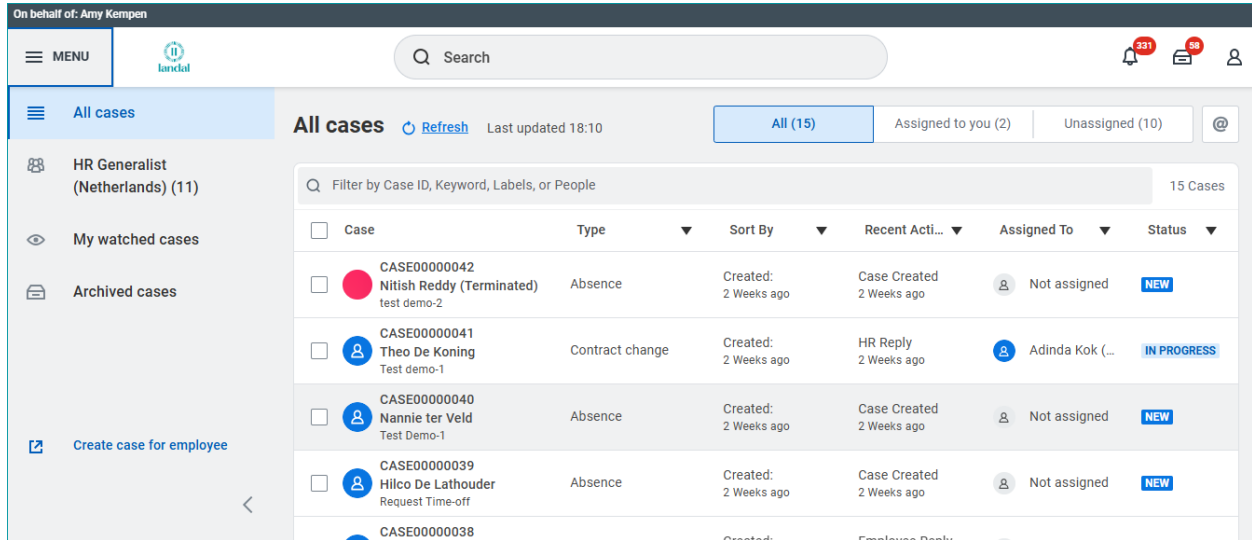
### Part 3: View Help Cases Workspace

#### Step 1: Navigate to Workspace

- Click **Help Case Workspace** from the left-side menu.

#### Step 2: Filter and View Cases

- View all open cases.
- Use filters to sort by:
  - **Type**
  - **Status**
  - **Assigned to you**
  - **Group**



## Part 4: Manage Help Cases

### Step 1: Open a Case

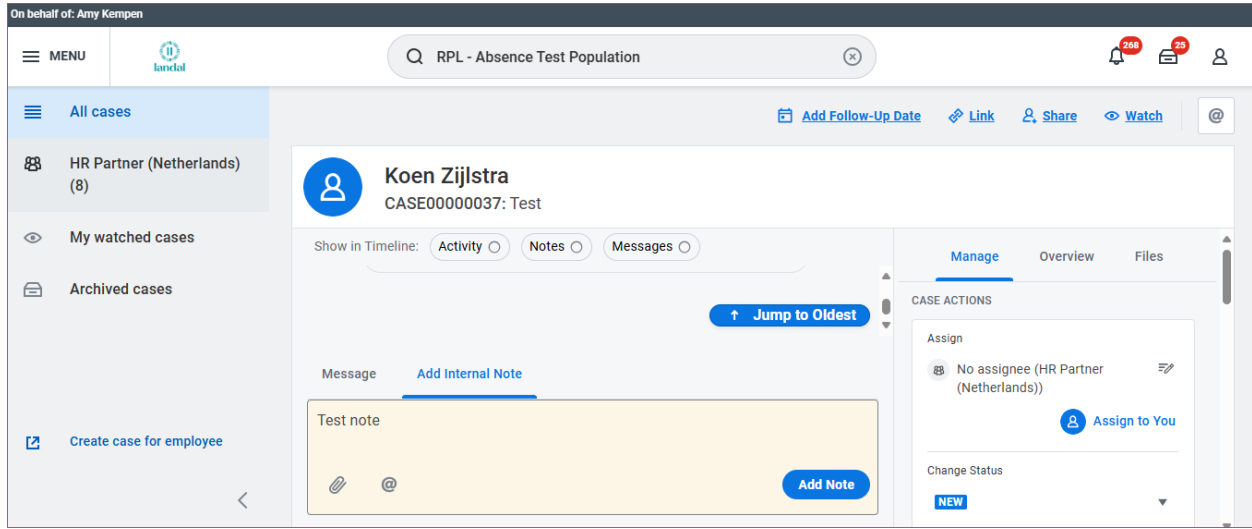
- Click on a case to view details.

### Step 2: Use Messaging and Notes

- Use **Add Template** or type a message.
- Add **Internal Notes** to tag colleagues.

### Step 3: Update Case Info

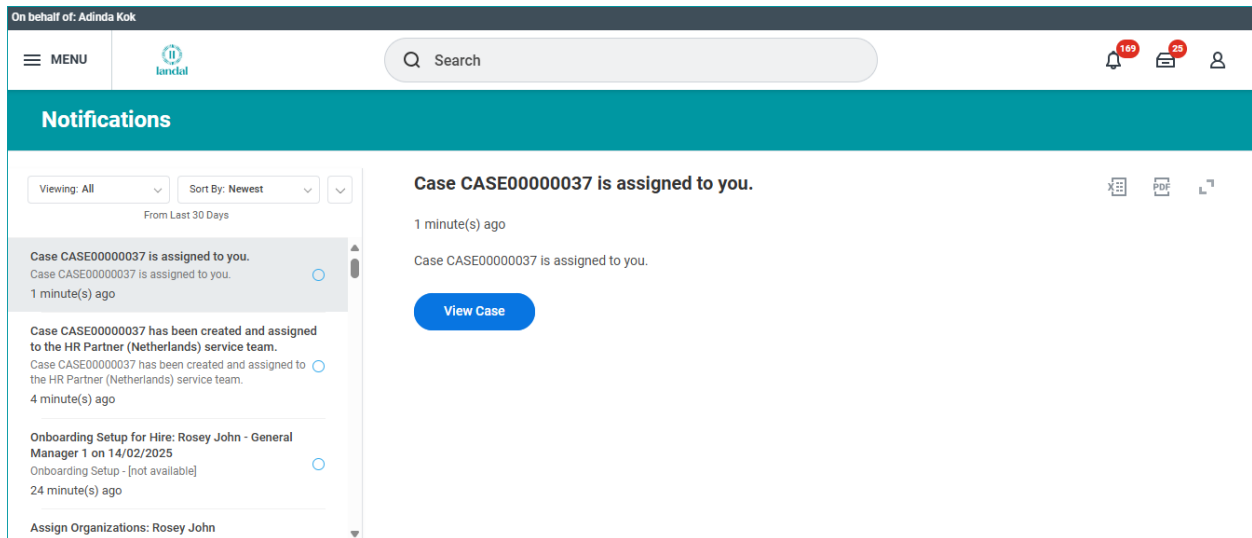
- Assign to **Team** or **Assignee**
- Change **Status**, **Type**, **Add Flag**, or **Label**
- Scroll to view creator's personal info (e.g., location)



## Part 5: Notification of Assigned Case

### Step 1: Check Notifications

- Click the **Notification Bell** icon.
- Click **View Case** to open the assigned case.



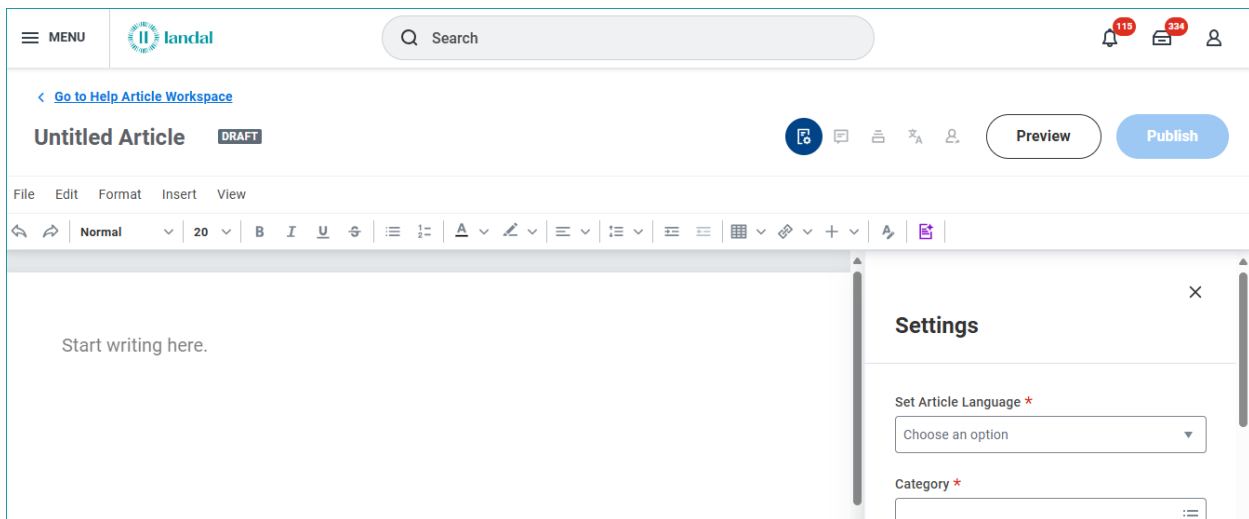
## Part 6: Create Help Articles

### Step 1: Access Help Articles Workspace

- Click **Help Articles Workspace** from the left-side menu.

### Step 2: Create and Publish

- Click **Create New Article**
- Enter:
  - **Title**
  - **Content** (with formatting)
  - **Settings** on the right panel
- Click **Preview**, then **Publish**



### Note:

- **Find Answers** section will include HR policies and Workday instructions at go-live.
- Articles and cases can be accessed via the **Search bar**.
- Case creators receive notifications when cases are assigned or updated.
- Internal notes are not visible to the case creator.