

This job aid outlines the various ways that you can search in Workday. It also provides some tips and tricks to get the most out of Workday Search.

GLOBAL SEARCH

Workday makes it easy to search for people, tasks, reports, and business data using the Search box.



For example, to find a worker, enter their name into the Search box, and then press Enter on your keyboard. From the search results, navigate to the Categories list and select People to filter the results to only display workers in your organization. Use search categories to filter your search for more specific results.

Keep in mind that searches find exact matches. If you misspell the search text, likely no results will return. Workday Search also favors complete word matches over partial word matches, so that search results match the term you enter more closely. If you search using partial names or terms, the results may not display partial matches, depending on data volume. For example, if you search for “Alex,” the results may not display the name “Alexander.”

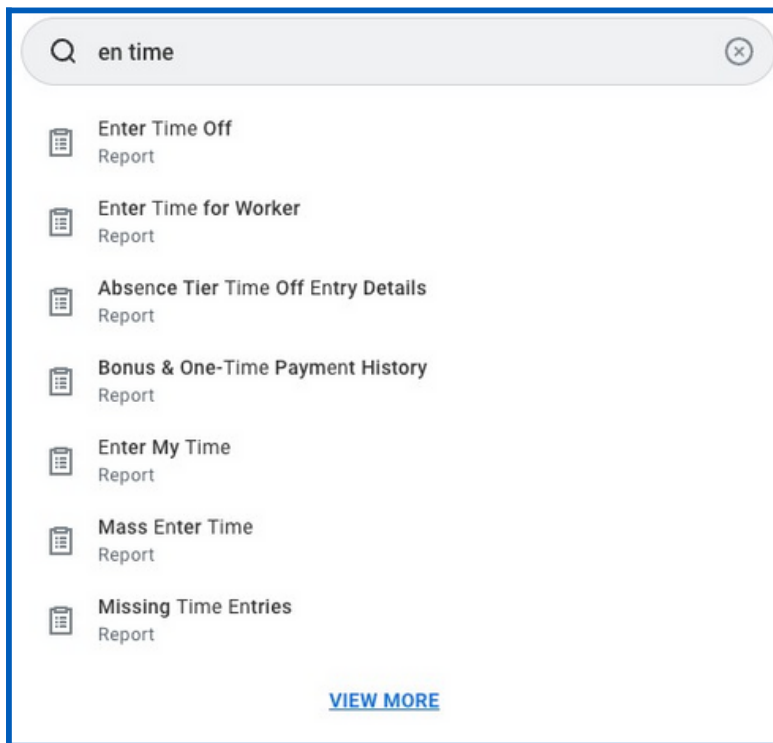
Though complete word matches are favorable, you can also use a partial search to find your results. For example, if you want to find the Maintain Candidate List Assignment task, you can use the search string “main can lis.” Though this method is still effective, it may not be a best practice for all search types where Workday may return multiple results.

Search prefixes restrict the search results to a particular type of Workday object. Search prefixes are lowercase letters, followed by a colon (:). For example, “bp:” returns all business process definitions. To return a list of all search prefixes available to you, enter a question mark (?) in the Search box and then press Enter.

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Global Search Auto-Suggest displays suggested results as the first type-ahead result. It also displays loading animations when type-ahead is fetching results. To view all results, select the View More button on the search results page.



Search results are configurable by selecting the Configure Search button on the search results page.

RECENT SEARCHES

Workday saves your recent search results and queries for convenience. The five most recent searches display, helping you access these items faster. You can clear the results by selecting Clear in the Search box pull-down.

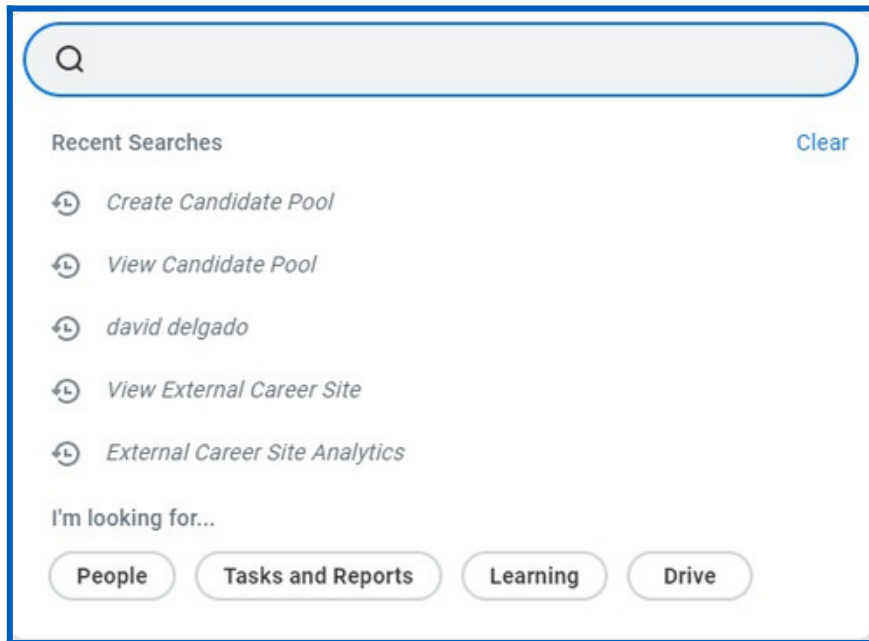
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SEARCH CATEGORIES


Workday enables you to use categories to search for specific items and filter results, reducing the number of out-of-context search results. If a user does not have security access to a particular category, Workday will not list the category in the Search box pull-down. Also, the search categories are not configurable. Selecting a category adds the option to the Search box as a search criterion. This added search criteria filters search results.

Additionally, users can add a search category to the Search box by keying the category name followed by a colon (:). Workday adds used categories to the Recent Searches result.



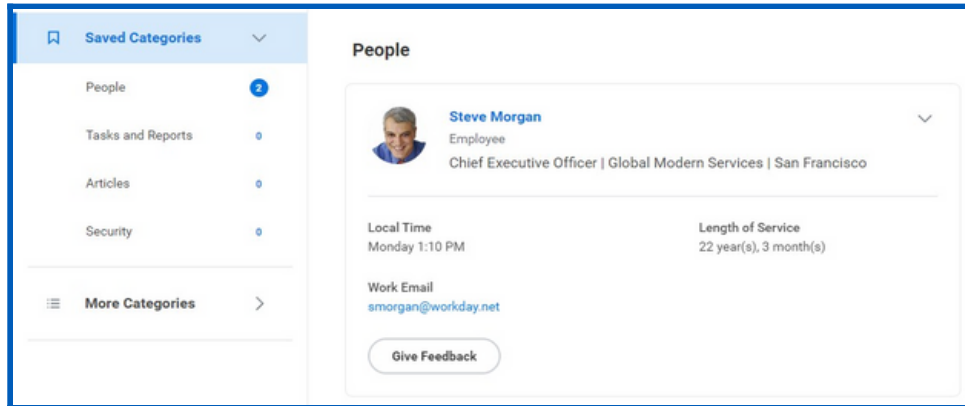
WORKER SEARCH

You can quickly find an active worker in global search, reports, and prompts. From the Search box, you can search for a worker by first name only. Workday sorts the results by relevance, first showing all workers with a matching first name.

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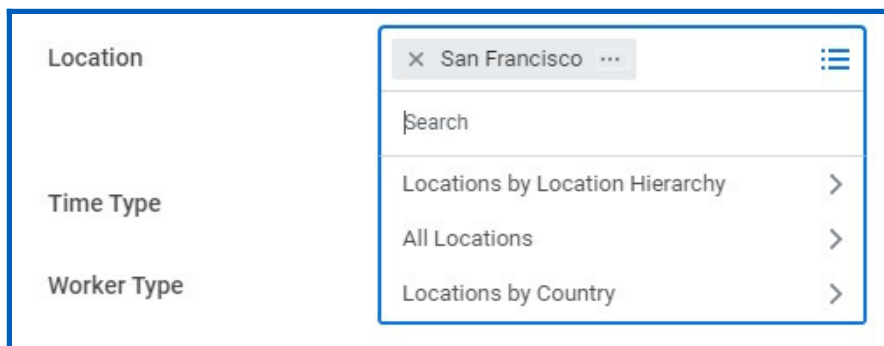


After searching for a worker, their photo, business title, supervisory organization, and location display. This identifying information makes it easy to confirm you have found the correct person.



PROMPT SEARCH

With prompt search, you can search directly in a prompt.



There are two ways to use this search type:

1. Use the hierarchy provided in the prompt until you find what you are looking for.
2. Enter a search term and the system searches against the data that is applicable to that selection.

To make your search most effective:

- Use specific searches, similar to global search.
- Avoid general terms such as “find” and “work.”
- Search for custom IDs, available to power users, for the quickest results.
- Use the first two letters to jump directly to results and then press Enter on your keyboard. Selecting anywhere outside of the prompt deletes the search.

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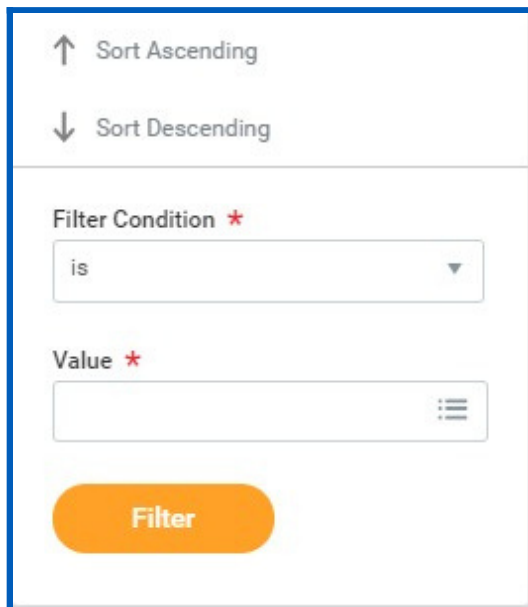


SEARCH REPORTS

There are two main use cases for using Search reports: a filter use case and a search use case.

FILTER USE CASE

Use the filter functionality when you want to find something manually. For example, if you are searching for a specific inventory item, you can use the filter to narrow the search by manufacturer. Then, filter by part type to further reduce results.



The screenshot shows a search filter interface. At the top, there are two options: 'Sort Ascending' with an upward arrow and 'Sort Descending' with a downward arrow. Below these is a section for 'Filter Condition *' with a dropdown menu currently showing 'is'. Underneath is a 'Value *' field, which is currently empty and has a menu icon on the right. At the bottom of the interface is an orange button labeled 'Filter'.

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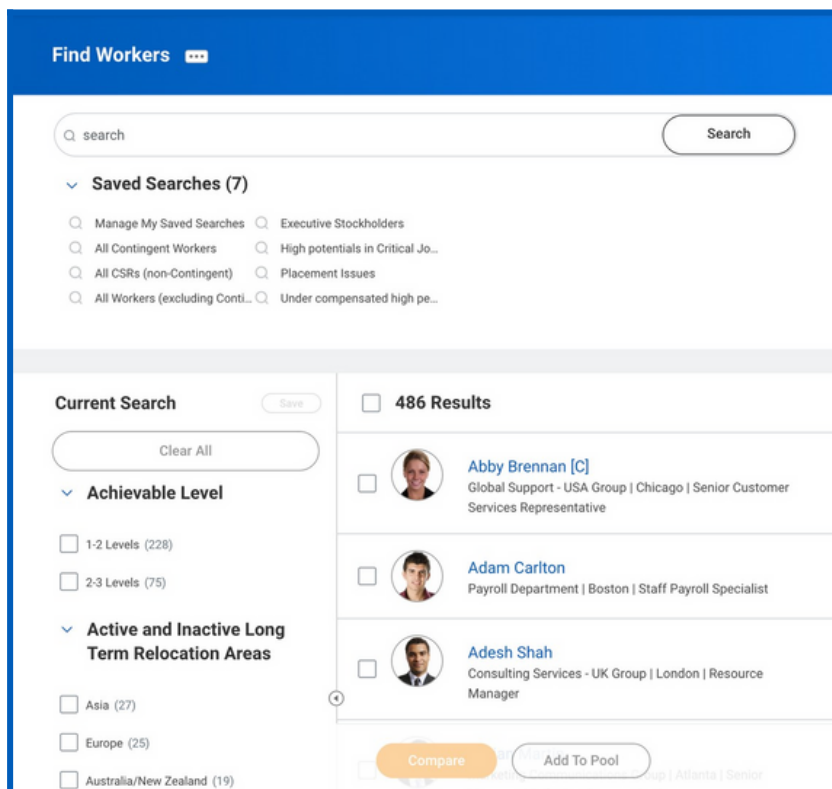
SEARCH USE CASE

If you only have a general idea of what you are looking for, use Find reports to help you narrow down your search. For example, if you are looking to fill an open position with someone internally and they need to meet specific criteria, use the Find Workers report. You can search for employees by city, skillset, cost center, and so on. You can also use the search field within the report to tailor your search results using different types of search methods.

These include:

- Boolean search – (sales OR marketing) AND manager
- Phrase search – “marketing manager”
- Exact Match – specificmail@workday.com

You can save faceted searches for later use.



From the search results, select a link for more information or initiate an action from the object's Related Actions.