

Workday Documentation Basics

Product Summary

December 17, 2025



Contents

How to Use Workday Documentation Update..... 3

Find Information.....5

Reference: Additional Resources..... 7

Video: Workday Documentation Overview.....8

Machine Translation Disclaimer Test New update.....8

How to Use Workday Documentation Update

Welcome to our documentation. We recommend that you use Chrome for Windows and macOS because some features don't work well with other browsers.

The Workday Documentation offers these features:

Feature	How It Works
Navigation	- Click the Workday logo or Workday Documentation on the top left of any page within our documentation to access the home page. - When you want to drill into a section of content, select the caret icon next to the text instead of the text itself. Example: From the home page, when you select Human Capital Management, select the caret icon next to Worker Information to get to the next section level. - Use the breadcrumbs above any topic title to orient yourself within the documentation, especially after navigating to a topic from your search results. - Navigate through a book by clicking the previous and next topic links at the bottom of each topic. - Some Workday guides require log in credentials to view the content. When you click a link to one of these guides, Workday prompts you to log in. For access, contact your HR or IT administrator.
User Type	We organize content on the Home page by these user types: - Administrators: How to configure, implement, and use Workday. This content requires you to log in to view it. - Users: How to use Adaptive Planning, Strategic Sourcing, Peakon Employee Voice, and more. - Developers: Access to Workday Extend and API resources. Some of this content requires you to log in to view it.
Topic Types	We deliver most of our content within these topic types: Setup Considerations: Overview of a product or feature for you to use to assess configuration options and plan the work needed to set up the functionality.

Feature	How It Works
	• Tasks: How to set up and use a product or feature. • Concepts: Background information about what you need to know to complete tasks. • References: Reference material that supports Workday usage. • Examples: Step-by-step instructions for how to accomplish a specific goal in Workday. • FAQs: Answers to questions we've frequently received through Workday Community, Customer Support cases, and more. • Troubleshooting: Describes problems, possible causes, and their resolutions for a product or feature. • Use Case: Describes a complicated process or task with a diagram or a video.
Search and Filter	• Search with exact phrases, wildcards, or operators across all publications. • Use facets to narrow your search results. • To learn more about how to search our content, see Find Information.
Multilingual	You can display content in your preferred language by selecting the globe icon at the top of the documentation home page. When you select a language other than English, we display all of links that the English home page has, but we add a globe icon next to the links that have content translated in the language you selected. You can also search in different languages.
Download and Print	You can download and print our content in either of these ways: • Click Download PDF at the top of a topic to download the entire book the topic is in. Print all or specific topics from the downloaded file. • Use your browser functionality to download or print specific topics as a PDF file.
Links	• Find additional information linked in the Related Information section at the end of a topic. • Click cross-book links to view content located in another book. • Click links with an external icon (a blue box with a white arrow) for content outside of our documentation.

Feature	How It Works
Provide Feedback	• Send feedback directly to Workday's documentation team by responding to the Was this helpful? prompt at the bottom of a topic. • We recommend including your feedback details, name, and email so that we can respond to your feedback or query.
Glossary	• Access the full glossary from all books to view Workday-specific terminology. • Click any linked glossary terms from within a topic to view its definition. • View hover-text definitions for glossary terms in English content.

Find Information

You can use these advanced search options to find more relevant information within the Workday Documentation:

- Search in your preferred language, where available.
- Search for [exact terms](#).
- Search for [exact phrases](#).
- Search with [wildcards](#).
- Search with [comparison and boolean operators](#).
- Refine your search results using facets.

When you search:

- Workday Community, the search results include all Community content, such as articles, and Administrator Guide content.
- From within the Workday Documentation site, you won't see results from the Workday Community.

Search for Exact Terms

Search Query	Example
Use the + sign before the desired term to search for exact matches.	When you search for <i>+performance</i> , the results only include topics containing that exact word. The results exclude topics with variants such as <i>performed</i> or <i>performing</i> .
You can combine exact terms with normal terms in the same query.	When you search for <i>employee +performance engineering</i> , the results include topics with variants of <i>employee</i> and <i>engineering</i> but only exact matches for <i>performance</i> . The results exclude topics with <i>performance</i> variants such as <i>performed</i> and <i>performing</i> .

Note:

- Matches aren't case-sensitive

- Matches are sensitive to accented characters. You may want to combine exact terms with normal terms when searching languages that use accents, such as French or Spanish.
- The pound sign (#) has the same effect as the plus sign (+).
- You can't combine **wildcard** characters (* and ?) with exact terms (+) in the same search query.

Search for Exact Phrases

Search Query	Example
Use quotation marks to search for exact phrases.	" <i>Change Job business process.</i> "
Combine search terms in quotes with other terms outside the quotes.	When you search for <i>setup</i> "time tracking", the results include topics that contain the word <i>setup</i> and the phrase <i>time tracking</i> . The results don't include topics that contain <i>time</i> and <i>tracking</i> separately.
Use any 1 of the contiguity operators between keywords for which you want to find contiguous occurrences only. All of these characters have the same effect: • () • ..' • /\ • _-	The search for <i>tax_form Canada_Revenue_Agency</i> is the same as " <i>tax form</i> " " <i>Canada Revenue Agency</i> ".

Search with Wildcards

Use wildcard characters (* and ?) to expand your search variability. Wildcards are useful if you are unsure about exact spelling or unfamiliar with a functionality.

Search Query	Example
Use an asterisk (*) at the end of the desired term to search for words that begin with that term.	When you search for <i>micro*</i> , the results include terms such as <i>Microsoft</i> , <i>microphone</i> , or <i>microprocessor</i> .
Use the question mark (?) at the end of a term or within a term to search for words that include any characters in place of the question mark.	When you search for <i>gr?y</i> , the results include terms such as <i>greyor gray</i> .

Note:

- You can't use an asterisk (*) in the middle of a term. Instead, use the question mark (?).
- You need to include at least 2 characters before a wildcard. This means that you can't begin a search query with a wildcard.
- Search results only include the first 32 wildcard terms found alphabetically by default. Increasing the maximum number of results can cause performance issues.

Search with Comparison and Boolean Operators

You can use operators in search queries to refine your results:

Operator	Type	Example Search Query	Results
=	Comparison	@title= <i>tax</i>	Topics that contain <i>tax</i> in their titles.

Operator	Type	Example Search Query	Results
==	Comparison	@title=="Enterprise Search"	Topics with <i>Enterprise Search</i> as the exact title only.
<>	Comparison	@title <> "Enterprise Search"	Topics that have the title field defined and don't contain <i>Enterprise Search</i> in their title.
AND	Boolean	expense AND report	Topics that contain both <i>expense</i> and <i>report</i> .
OR	Boolean	expense OR report	Topics that contain either <i>expense</i> or <i>report</i> .
NOT	Boolean	expense NOT report	Topics that contain <i>expense</i> and don't contain <i>report</i> .
NEAR:[number]	Boolean	expense NEAR:5 report	Topics in which <i>expense</i> and <i>report</i> are no more than five words apart.

Note: Boolean operators are case sensitive. When you write them in lower case, Workday treats them as normal search terms.

Filter Search Results

You can use these facets to filter your search results:

- Publication: Use to find content in a specific publication.
- Product: Use to find content associated with a specific Workday offering.
- Using Workday: Use to further filter by functionality within a product.

Workday updates your results every time you use the facets. You can:

- Use facets to search without entering a term in the search box.
- Click the magnifying glass in the search bar without entering a search term, and select the relevant facets.

Reference: Additional Resources

In addition to the information we provide in the Administrator Guide, What's New in Workday report, and Service Update Notes, you might find these resources helpful:

Resource	Description
Customer Center	Workday case management system. Named Support Contacts can use this page to make general inquiries and log cases.
How to Request Training Support	Information on requesting and purchasing training, including how to find your training coordinator.
Implementation Partners	Directory of our Professional Services partners.

Resource	Description
Release Preparation Center	Resources on features, testing, adoption planning, and other release information.
Tenant Refreshing	Information on the tenant refresh process. To read about sandbox refresh exemptions, click here .
Workday Touchpoints Kit	Overview of the Workday Touchpoints Kit, including information on how to get access to and benefit from the kit.

Video: Workday Documentation Overview

Watch this video to learn about how to use our documentation. We recommend expanding the video to full screen for the best viewing experience.

Machine Translation Disclaimer Test New update

Some content in this site has been translated using machine translation. Machine translation is not perfect and the controlling version is the English version of those contents. Any discrepancies or differences created in the translation are not binding and have no legal effect.