Workday – Basics

Search in Workday - Employee

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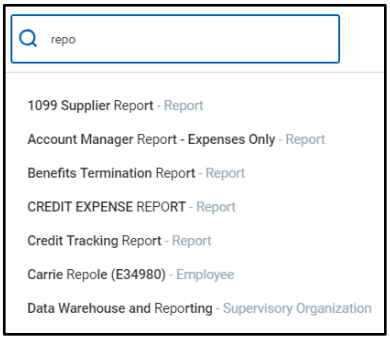
=Warning *=Timesaver* *=Note*

About Search

The Search function allows you to easily locate people, organizations, tasks, reports and more and is available on every page. If you are not sure where to find information in a particular worklet, you can type the task name or report you are looking for in the **Search** box.



Workday's Search box is intuitive and predicts results. As you type, Workday begins to filter your request and offers several of the most common search results in a drop-down menu.

Search in Workday

1. In the **Search** box, enter information you wish to locate, e.g., a person's name, task, or a report name.

TIMESAVER: You do not need to enter an entire name, task, or report.

2. Select on one of the results from the drop-down list or press **Enter** or **Return** on the keyboard to display the full search results on a new page.

NOTE: The search results will only provide viewable information per your security level.

Expand Your Search

When using the Search Bar, the search results may not always return the information for which you are looking. For example, if you want to locate a specific purchase order and you enter the purchase order number in the Search Bar, Workday would not find the purchase order unless you change a setting for your account to search *All of Workday*.

1. From your Home page, select **My Account** (your name or picture in the top-right corner) and select **My Account**.
2. Select **Change Preferences**.
3. In the **Search Preferences** section, select the **Preferred Search Category** field and select **All of Workday**.
4. Select **OK** at the bottom of the window.
5. Select **Done** at the bottom of the window.
6. Sign out and back in to Workday in order for this feature to take effect.

Use Related Actions

When the **Related Actions** icon Actions or ••• displays next to an object, you can take action or complete tasks related to that object. Available actions depend on your security level. Most employees can use the Related Actions functionality to view data and accomplish tasks related to their own employee record, such as requesting time off. Many of these tasks can also be accomplished within the worklets on your **Home** page.