

Workday Documentation Basics

Product Summary

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How to Use Workday Documentation

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

We provide Guides documentation by product area for these audiences:

- Administrators: How to plan for releases, as well as configure, implement, and use Workday products. We deliver this content in product-specific guides, and you need 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.

Note: If you have questions about how to use Workday for personal tasks as an employee, such as setting up your payroll deductions, please consult your employer's guidelines or contact your Workday administrator.

You can view quick links and overview videos on the Home page, and access Workday product and platform information from the Guides page.

The Workday Documentation site offers these features:

Feature	How It Works
Navigation	• Click the Workday logo or Workday Documentation in the header or Home from the menu to access the documentation home page. • In Guides content, to drill into a section of a book, select the caret icon next to the text instead of the text itself. Example: In the Human Capital Management book table of contents, 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.
Products	We organize content on the Guides page by product areas.
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

Feature	How It Works
	configuration options and plan the work needed to set up the functionality. • 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. While on the Home or Guides pages, a globe icon displays next to the links for translated content if there is a mixed language experience. 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 an individual topic in PDF format.
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.

Find Information

You can use Workday Documentation AI Generated search result to find content in Guides and the Release Center only. The results provide summaries of concepts, tasks, and other information from the links referenced in the citations below the summary. You can turn AI Generated search on and off, as well as give us feedback on the results.

You can also use Workday Community's AI Generated Search. Results include all Workday-authored Community content, including Knowledge Base articles, and training materials, along with Workday Guides, Help Center, and Release Center content. Results don't include discussions or questions, answers, user group posts, contributed solutions, ideas, or training

You can use these search options to find 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.

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=tax	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.

Related Information

Examples

[Workday Community: Search Tips for the Workday Community](#)

Video: Workday Documentation Overview

Watch this video (2:09) to learn about how to use our documentation. We recommend expanding the video to full screen for the best viewing experience.

Additional Resources

In addition to the information we provide in Workday Guides and the Release Center, you might find these resources helpful:

Resource	Description
Case Management	Workday case management system. Named Support Contacts can use this page to make general inquiries and log cases.
Training Support	Information on requesting and purchasing training.
Implementation Partners	Directory of our Professional Services partners.
Release Center	Release notes and other resources about 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.

Talk to Us About Workday Documentation

We love to hear from Workday Documentation users about your experience. This article describes the multiple ways you can connect with us to share your thoughts.

Get Involved

We are always looking for ways to improve the content experience for our users. See [Configuration and How-To Resources](#) to learn how about the content we publish to help you through set up and configuration of Workday functionality. Share your feedback by:

- Joining the [Workday Content Crew](#) user group. We host demos and share best practices related to how to use Workday Documentation to help you prepare for feature releases. When considering documentation changes, we solicit feedback from the user group for their preference. Lastly, the Content Crew is a great forum to collaboration with your peers about Workday's Documentation resources and how they use it to help them in their day-to-day work.
- Emailing us at doc.feedback@workday.com to let us know your concern or what you're thinking.
- Sending feedback related to a specific topic from the [Workday Documentation site](#). Each topic offers the ability to submit detailed feedback.
- Submitting feedback about the AI Generated search summary and results about their relevance and usefulness.

We recommend you bookmark doc.workday.com for easy access. Thank you for partnering with us!

Translation Disclaimer

The Administrator Guide, certain Workday sites, and the user interface for certain Products might be displayed in languages other than the default English version. These translations might be provided through AI and machine translation. Content generated through machine translation might contain inaccuracies. The English default version remains the controlling version. All warranties related to translations, including accuracy and reliability, are hereby expressly disclaimed.