

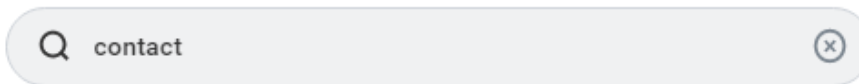
Getting

Started: Set People Experience Search Preferences Employee

SET UP PEOPLE EXPERIENCE SEARCH (PEX SEARCH) PREFERENCES

With Workday's new release (2022R1-March), a more intuitive search feature has been implemented to increase efficiency and optimize search functionality for a more personalized experience. Search tips are also provided to enable a specific search category.

1. For example: Enter contact in the search bar and click **Enter**.



Workday will return the search results in the main page under the appropriate headings based on the Saved Categories and will provide Saved Categories and More Categories options on the left-hand side of the main page.

A screenshot of the Workday interface showing search results for 'contact'. On the left, there is a sidebar with 'Saved Categories' (People: 0, Tasks and Reports: 12) and 'More Categories'. The main content area is titled 'Tasks and Reports' and lists several items: 'Contact Information' (Report), 'Add Emergency Contact' (Report), 'Change Contact Information' (Report), 'Change My Emergency Contacts' (Task), and 'Change My Home Contact Information' (Task). At the bottom of the main content area is a button that says 'View All 12 Tasks and Reports'.

The **Saved Categories** group represents priority and most often searched items. The More Categories group provides less utilized groups and the returned items associated. The Saved Categories and More Categories each provide the group label of items returned and the number of items in each group. The current groups selected in the Saved Categories are selected by default. The Saved Categories and More Categories can be optimized to search

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on categories more often searched and the categories can be prioritized. To configure the groups in each searchable category, click on the Configure Search option at the bottom left-hand side of the main page. The **Configure Your Search** pane will display.

Configure Search

Configure Your Search ✕

Drag and drop to reorder both lists.

Saved Categories

What are the categories you would like to search first? (Minimum of 1)

- ⋮ People
- ⋮ Tasks and Reports

More Categories

What are the categories you do not want to show?

- ⋮ Recruiting
- ⋮ Projects
- ⋮ Assets
- ⋮ Banking and Settlement
- ⋮ Expenses
- ⋮ Financial Accounting
- ⋮ Grants
- ⋮ Procurement
- ⋮ Revenue
- ⋮ Inventory
- ⋮ Organizations
- ⋮ Student
- ⋮ Learning
- ⋮ Drive

Save

Cancel

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- To add a category to the Saved Categories group, use the mouse to drag and drop the categories from More Categories to Saved Categories. For example, click on **Expenses** in More Categories and drag it to the Saved Categories group and release the mouse button to drop the category in the Saved Categories group.

Saved Categories

What are the categories you would like to search first? (Minimum of 1)

- ⋮ People
- ⋮ Tasks and Reports

More Categories

What are the categories you do not want to show?

- ⋮ Recruiting
- ⋮ Projects
- ⋮ Assets
- ⋮ Banking and Settlement
- ⋮ Expenses
- ⋮ Financial Accounting

Saved Categories

What are the categories you would like to search first? (Minimum of 1)

- ⋮ People
- ⋮ Tasks and Reports
- ⋮ Expenses

- To remove a category to the More Categories group, use the mouse to drag and drop the categories from Saved Categories to More Categories. For example (see next image on next page), click on **People** in Saved Categories and drag it to the More Categories group and unclick the mouse button to drop the category in the More Categories group.

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Saved Categories

What are the categories you would like to search first? (Minimum of 1)

- ⋮ People
- ⋮ Tasks and Reports
- ⋮ Expenses

More Categories

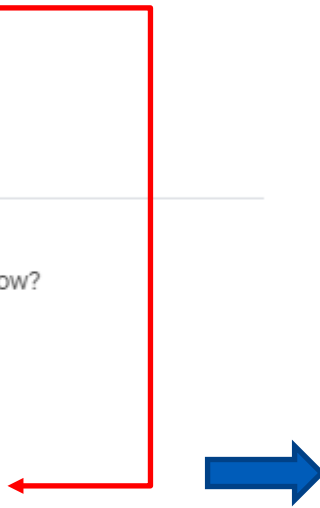
What are the categories you do not want to show?

- ⋮ Recruiting
- ⋮ Projects
- ⋮ Assets
- ⋮ Banking and Settlement
- ⋮ Financial Accounting
- ⋮ Grants
- ⋮ Procurement

More Categories

What are the categories you do not want to show?

- ⋮ Recruiting
- ⋮ Projects
- ⋮ Assets
- ⋮ People
- ⋮ Banking and Settlement
- ⋮ Financial Accounting
- ⋮ Grants
- ⋮ Procurement



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- To organize the groups within the Saved and More Categories, drag and drop each group to prioritize the search results in each category. For example, in the Saved Categories, reprioritize Expenses to be first in the results and in the More Categories, reprioritize **Projects** to display results below the **Banking and Settlement** group.

Saved Categories

What are the categories you would like to search first? (Minimum of 1)

☰ Tasks and Reports

☰ Expenses



Saved Categories

What are the categories you would like to search first? (Minimum of 1)

☰ Expenses

☰ Tasks and Reports

More Categories

What are the categories you do not want to show?

☰ Recruiting

☰ Projects

☰ Assets

☰ People

☰ Banking and Settlement

☰ Financial Accounting

☰ Grants



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More Categories

What are the categories you do not want to show?

- ⋮ Recruiting
- ⋮ Assets
- ⋮ People
- ⋮ Banking and Settlement
- ⋮ Projects
- ⋮ Financial Accounting
- ⋮ Grants

5. Click **Save**.



Note: To view items returned in the More Categories search, click the arrow next to the More Categories header to expand the search results.