Workday Reporting

Workday Reporting provides **real time**, **drillable data** where you can have everything in one place. There are various types of reports that you can in order to find the information that you need. As you navigate through reports, check out the following resources and information to help set you up for success!

Resources to Get You Started

There are numerous training related resources available for finance reporting. These resources are in the form of stand-alone training, quick reference guides (QRG), and part of Finance Instructor-Led and Self-Paced Courses. Pleas see below for some resource highlights:

Workday Reporting Course – This self-paced course provides an in-depth overview of Workday Reports & Dashboard features and offers best practices when running reports. This course also contains a UBI to Workday Reports crosswalk for you to reference.

Reports Quick Reference Guides – Quick reference guides (QRGs) provide step by step guidance for Workday Finance reports. These QRGs can walk you through how to **access**, **view**, and **run reports and dashboards** and cover topics such as General Reporting Functionality, Fiscal Admin Dashboard, and Grant Admin Dashboard. The full list of published QRGs and resources can be found on the UVA FST Training Page under the Workday Reporting section.

UBI to Workday Reports Crosswalk – This crosswalk lists the most used finance reports in University Business Intelligence (UBI) Reporting and maps them to reports that are most like them in Workday.

Did You Know?

Spotlight Reports provide a list of custom and standard reports that support different functions. This is a one stop shop to view all reports related to one area. To start, you can search "spotlight" to see a list of all spotlight reports. The **Fiscal Administrator Persona Spotlight Report** is one example that provides useful reports to all generalist finance users.

Popular Workday Reports

Please note *that some of these reports may be restricted by security role.*

- Fiscal Administrator Persona Spotlight Report
- FDM Reference – [Provide worktag type e.g.,, "FDM Reference - Cost Center"]
- Spend Detail Report
- General Ledger Details
- Find Journal
- Find Expense Reports (also check out Find Expense Report)
- Find Subrecipients
- Worker Costing Allocation Information – Payroll
- Find Purchase Orders
- Find Supplier Invoices (Also check out Find Supplier Invoice)

Have a reporting related question or want to learn more?
Check out the Reports & Dashboards Office Hours as they are held every Tuesday from 3pm – 4pm throughout the month of August.

What's New for Workday Reports

You asked and we heard your requests for new reports and enhancements! Check out **what's newly added** to Workday Reports. *If you have a new report or enhancement request, please send a note to* askfinance@virigina.edu *with the description and details.*

New Enhancements to Workday Reports

- **Find Expense Report** – Custom report to replace standard Find Expense Reports
- **Alert – Credit Card Transactions Not Expensed** – Added prompts for Cost Center & Hierarchy as well as included Employee Name in the report
- **Find Supplier Invoice** – Custom report to replace standard Find Supplier Invoices; adds prompts for Cost Center & Hierarchy as well as Worktags
- **Account Certification Dashboard** – Added links to references and related reports
- **Miscellaneous Fixed Asset Report** – Numerous minor changes to layouts and fields

New Reports Added to Workday

- **Details for Account Certification** – New report bringing together more elements to support the Account Certification process, including:
  - Combines Revenue, Expense, and Transfer ledger items
  - Payee name/ID for Payroll transactions
  - ISD
- **BP in Process Monitoring** – New report can be filtered to see all finance BPs awaiting action or approval
- **Positions without Costing Allocation** – Identify positions within a Cost Center/Cost Center Hierarchy that do not have Costing allocation set up