

Reporting Functionality in Workday Overview

This QRG is designed to walk **Workday users** through the report functionality in Workday. By the end of this QRG, you will be able to run, view, and navigate data within reports using Workday’s various functionalities.

When running reports in Workday, it is important to understand how this differs from UBI Reporting. Workday Reporting provides real time, drillable data where you can have everything in one place. Conversely, UBI Reporting is not real-time (the data is as of the day prior to when you are running it), but allows you to work with large amounts of data and offers flexibility to customize reports. **To access UBI**, please refer to the [University Business Intelligence: Get Started](#) page that contains guidance and steps.

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Access List of Reports from Workday Search

You can view all reports that your role’s security permissions allow. If you do not have viewing access to a report needed for your position, discuss this with your manager. If this request needs to be escalated, you can submit a service desk request for your security permissions to be reviewed.

On the Workday home screen:

1. Type **Can Run** in the Workday search bar and press **Enter**.
2. From the search results, the most common options available are as follows:
 - Select **Common Reports I Can Run** to view a list of the most common reports based on your security role. When selecting this report, you will navigate to a screen with multiple prompts that allow you to specify criteria to filter and narrow down your report output.
 - Select **Reports I Can Run** to view a list of all reports available to you based on your security role.
 - Select **UVAFST Custom Reports I Can Run** to view a list of all custom reports tagged with UVAFST that are available based on your security role. This excludes Adaptive, Hoover, and EDW reports.

Tasks and Reports

Common Reports I Can Run
 This report provides a list of the most commonly run reports that are available to run based on your current security access. It also provides a brief description of the purpose of each report.

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 This report provides a list of reports that are available to run based on your current security access. It also provides a brief description of the purpose of each report.

UVAFST Custom Reports I Can Run
 Lists all custom reports that the user has access to run that are tagged with UVAFST. Excludes Adaptive, Hoover, and EDW reports.

3. Review the list of reports and their corresponding descriptions. Select the **hyperlinked report** you would like to run.

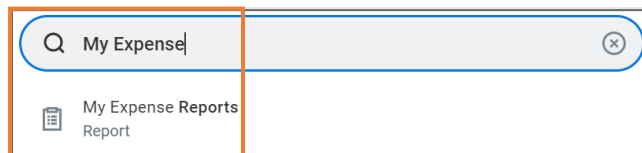
NOTE

- Depending on your role and security permissions, you can also search for the **Fiscal Administrator Persona Spotlight Reports** report to view a list of custom reports tagged with “Persona: Fiscal Administrator.” This curated list includes the reports most commonly used by Fiscal Administrators and similar roles.
- You can also perform a generic search for **Spotlight** in the Workday Search bar to display a list of all the available Spotlight Reports. Spotlight Reports provide a list of custom and standard reports that support different functional areas. Spotlight reports provide a one stop shop to view reports related to a specific functional area (such as, Accounts Payable and Customer Accounts).

Access Specific Reports from Workday Search

On the **Workday Home** screen:

1. Type the name of the specific report in the search field and select the report. For this example, we will search **My Expense Reports**.



NOTE

If you do not know the specific report to run:

- You can start your search with the word **Find**. Reports in Workday commonly start with the word **Find** (e.g., **Find Budget Amendments**, **Find My Expenses**, etc.).
- You can also start by searching **key terms** that are relevant to that report in Workday. For example, if you type **Expense** in the search field, **My Expense Report** is listed in the Search Results. You can apply similar logic to other report searches.

If you are an approver, remember to approve transactions in a timely fashion. To view all tasks that you need to review or approve, you can run the report “Processes Awaiting My Action.” The report shows what tasks you need to act on and how many days it has been since initiation.


On the **Report Prompt** window:

- Enter the information required for each field to customize the report to match your specific needs. The available prompts will vary from one report to another.

Did you know? When clicking into a field category, if you would like to select all options in the drop-down list, press CTRL+A, then Enter. If you want to deselect all, press CTRL+A then Enter again. You can apply this logic when filtering on a report column as well.

Save Prompts – You may use the exact same criteria to run the same report frequently. Instead of manually selecting your filter criteria when you run this report, you can **Save** your prompt values to prevent entering the same information each time. This option may not be available for certain reports.

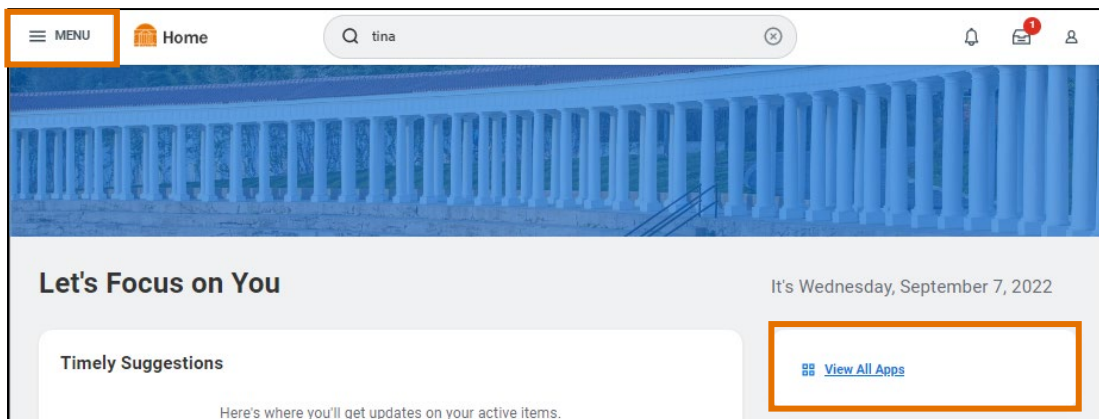
3. Click the **OK** button.


 NOTE	<p>If your report includes a large volume of data, you will see a pop-up notification asking if you would like to be notified when the report is ready. Select the Notify me Later option and continue with other work. Once the report is ready, you will receive a Notification in Workday.</p> <p>If preferred, you can stay on the page and wait for the report to load.</p>
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Access Reports from Workday Applications & Shortcuts

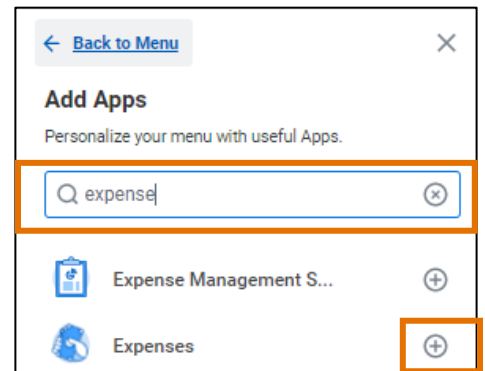
On the **Workday Home** screen:

1. Click the **View All Apps** section on your Workday Homepage or the **Menu** button on your Workday toolbar.

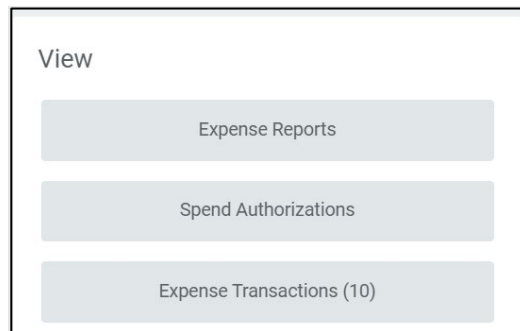


 NOTE	<p>If you do not see the worklet that you need on your Workday home screen, continue through this section to add to your Applications.</p>
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2. To add an application or shortcut, navigate to the appropriate tab (**Apps** or **Shortcuts**).
3. On the tab, click the **Add Apps** or **Add Shortcuts** button.
4. In the menu search, type a key term or the name of the application or shortcut. For example, you might search ‘**Expense**’ to add the ‘**Expenses**’ application. For shortcuts, you may want to search ‘**Spotlight**’ to add your favorite spotlight report.
5. Click the **(+)** to add the app or shortcut.
6. To see these new changes, click **Back to Menu**.



7. Select the recently added application or shortcut to navigate to the appropriate report. For this example, we will click **Expenses**. You may see different prompts or windows displayed to access the appropriate report.

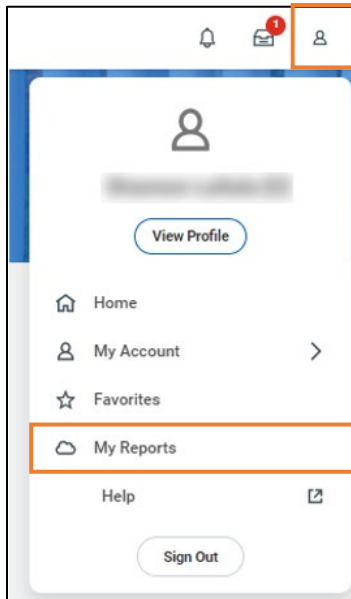


Access Reports from My Reports

Customized reports may be assigned to you and will appear in your **My Reports** list. Use the following steps to access these reports.

On the **Workday Home** screen:

1. Select your profile icon.
2. Select **My Reports**.



On the **My Reports** screen:

3. Select the **hyperlinked report** you would like to run.

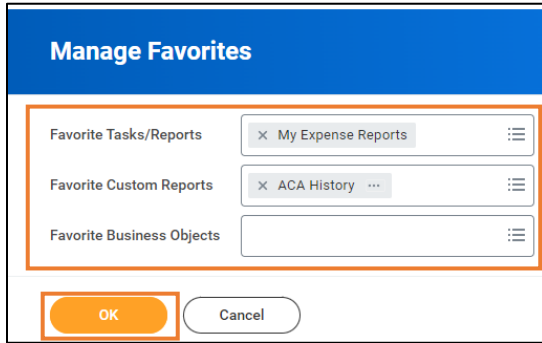
Add & Manage Favorites for Reports

On the **Workday Home** screen:

1. Type **Manage Favorites** in the Workday search bar and select the task.

On the **Manage Favorites** screen:

2. Enter the following fields:
 - **Favorite Tasks/Reports** – Search the specific non-custom report that you want to favorite. You can also search a key term (e.g., “report”) to view a list of available reports that can be added to **Favorites**.
 - **Favorite Custom Reports** - Search the custom report that you want to favorite. You can also click into the search bar to scroll through all the available custom reports that can be added to **Favorites**.
 - **Favorite Business Objects** – Leave this field blank.
3. Click the **OK** button.

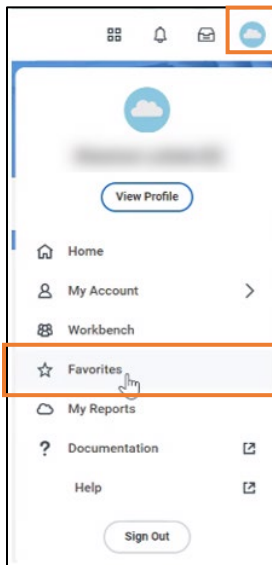


On the **Manage Favorites** screen:

4. Click the **Done** button.
5. To view your recently added favorites, navigate back to the **Workday Home** page.

On the **Workday Home** screen:

6. To access Favorites, select your **profile icon** and select **Favorites**.



On the **Favorite Reports and Tasks** screen:










7. Select the **report** you want to view. You can navigate through the different tabs to view other reports that you favorited.




You can manage **Favorites** by selecting the **Favorites Worklet** in your Workday Applications. Follow the corresponding steps in the [Access Reports from Workday Applications](#) to add the worklet to your home screen.

Review Report Functionalities

The table below describes the various report functionalities available in Workday. Each function displays via icons when viewing a report. Not all functions (icons) are available for all reports.

Icon	Function	Description
	Sort	Sorting is a process of arranging data in a meaningful order (i.e., in Ascending or Descending order) to analyze information more effectively.
	Filter	Filters can be used to narrow down data and view only required information in the report. Select Add Filter to add customized filter parameter(s) to narrow down search results. You can also click on the column header to filter specific data.
	Charts	Charts can be used to convert data from a table format to a chart format or vice-versa.
	Change Selection	Change Selection is used to customize your reports and charts. The options will vary depending on the type of data and how it is displayed. You can also use the Change Selection icon to change the search criteria for the report.
	Download/Print	Download a report in PDF or Excel format. Once you export and download the report, you can easily print it by selecting the print icon for the downloaded document.
	Toggle Full Screen view	You can use  to open full screen view or use  to close full screen view.
	View/Edit Grid Preferences	You can use this icon to: <ol style="list-style-type: none"> Freeze a column, by dragging the column name to the freeze pane. You can only freeze one column at a time. Hide a column by deselecting its checkbox. Reset your table view by clicking on the reset button. Reordering is accomplished by dragging columns to a specific order. Select Apply to apply changes.

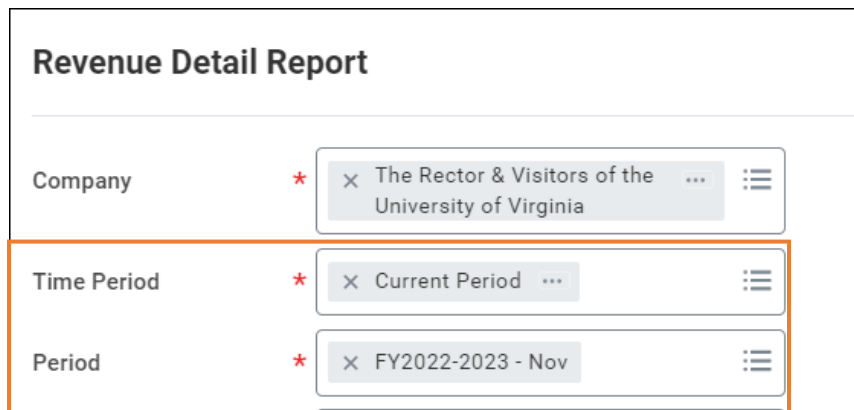
 If you use the filters in the report itself to reduce the data and then export it, it will still export ALL the rows returned in the original request. To export a subset, you will need to run the report again by selecting the **Change Selection** icon to restrict your data.

Select Time Period Filters

Many reports include the **Time Period** and **Period** filters on the Prompts window. These two filters work together to indicate the time frame for reviewing data in the report. In many cases, you may not need to change the default values unless you are looking for data for a different time frame.

Filter	Description	Example
Time Period	Select the time period you want to view the data <i>in relation</i> to the Period selected.	Current Period
Period	Select the “as of period” or “reference point” for reviewing your data.	FY2022-2023 – Nov

The above example would display results for November in fiscal year 2022-2023. If *FY2022-2023 – Sep* was selected instead of Nov, then the report would display results for September for fiscal year 2022-2023.



The screenshot shows a 'Revenue Detail Report' interface. It features three filter fields: 'Company' (set to 'The Rector & Visitors of the University of Virginia'), 'Time Period' (set to 'Current Period'), and 'Period' (set to 'FY2022-2023 - Nov'). The 'Time Period' and 'Period' fields are highlighted with an orange border.

Additional Examples

If you select...	Then....
Time Period: Current Period YTD Period: FY2022-2023 - Sep	Data from July through Sep for fiscal year 2022 – 2023 displays. Workday pulls fiscal year to date data as of Sep 22-23.
Time Period: Last 4 Periods Period: FY2022-2023 - Nov	Data for Aug, Sept, Oct and Nov for FY 2022-2023 displays. Workday pulls the last 4 periods of data as of Nov 22-23.