Reporting Functionality in Workday

Quick Reference Guide

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 Workday reports.

When running reports in Workday, it is important to understand how it 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 web page for more information and the steps to request access.

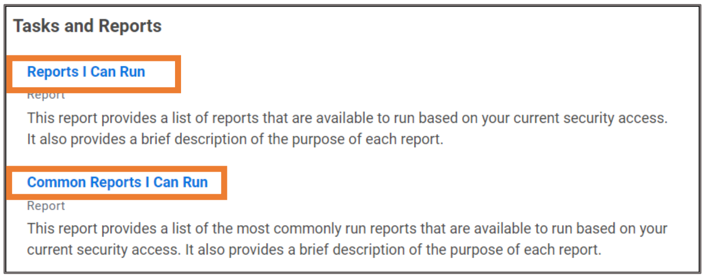
Table of Contents

Access a List of Reports from Workday Search

You can view all reports that your role's security permissions allow. If you do not have access to a report needed for your position, discuss this with your manager. Access to most of the Workday Finance reports requires the **Finance Reporting Viewer** role. This role may be automatically assigned to you based on your other security roles. If you do not have this role, you can request it through System Access Requests.

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 you select this report, a Prompts screen displays allowing you to specify criteria to filter and narrow down your report output. Leave the prompts blank and click **OK** to view a complete list of reports.
   - Select **Reports I Can Run** to view a list of all reports available to you based on your security role.



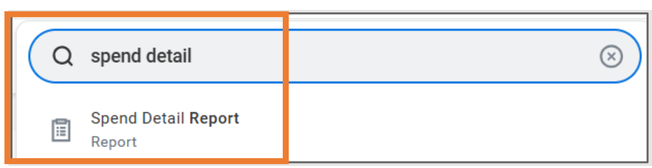
3. Review the list of reports and their corresponding descriptions. Select the **hyperlinked report** you would like to run.

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 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 for the **Spend Detail Report.**



NOTE	If you do not know the specific report to run, you can: • Search for **key terms** that are relevant to that report in Workday, such as "expense" or "fund balance" to list reports that include these terms. You can apply similar logic to other report searches. • Start your search with the word **Find.** Many reports in Workday start with the word **Find** (e.g., Find Budget Amendments, Find Purchase Orders, etc.). • Consult the [UBI and Workday Reporting Inventory]() for a curated list of commonly used reports. The inventory also includes UBI reports.

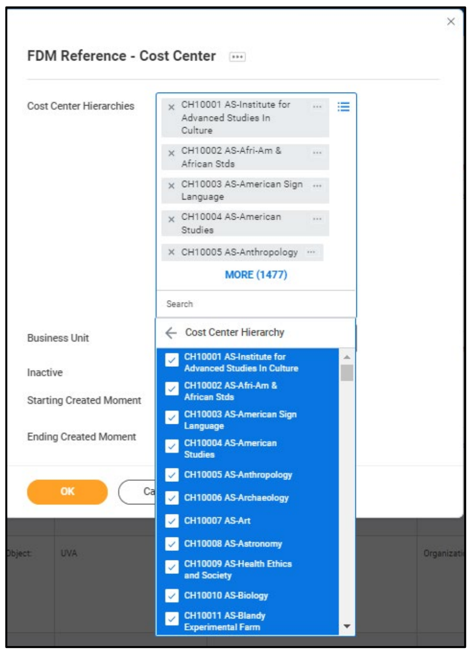
NOTE	If you are an approver, remember to approve transactions in a timely fashion. To view all tasks that you need to review or approve, you can run the report "**Processes Awaiting My Action.**" This report shows what tasks you need to act on and how many days it has been since initiation.

On the **Report Prompts** window:

2. 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.

HINT

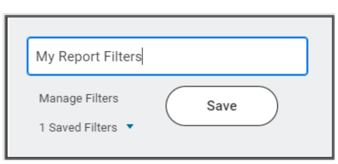
Did you know? When clicking into a field category, if you would like to select all options in the drop-down list, press **Ctrl** + **A**, then **Enter.** If you want to deselect all options, press **Ctrl** + **A** then **Enter** again. You can apply this logic when filtering on a report column as well.



NOTE

Save Prompts – If you will use the same parameters to run a specific report frequently, save your selections as a filter. That way, instead of manually selecting your parameters each time you run the report, you can simply select your saved filter. This option may not be available for certain reports.

- Select your filter values (parameters).
- Type a name for your "filter" at the bottom of the Prompts window, then click **Save.**



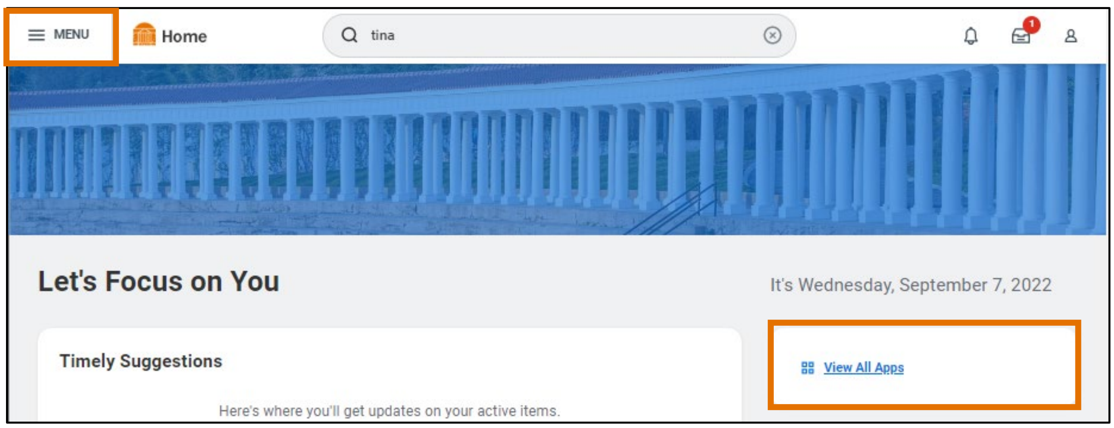
3. Click the **OK** button.

NOTE	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. If preferred, you can stay on the page and wait for the report to load.

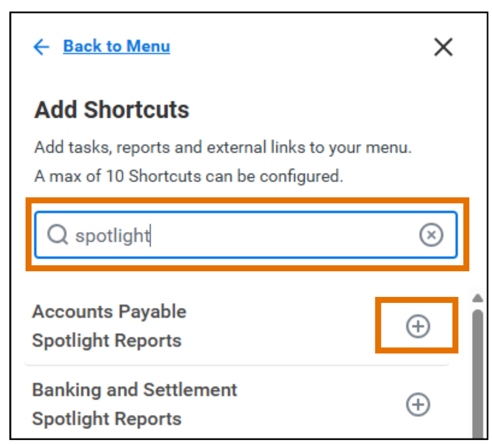
Access Reports from the Workday Menu or Shortcuts

On the **Workday Home** screen:

1. Click the **View All Apps** link on your Workday Homepage or the **MENU** button on your Workday toolbar.



2. To add an item, navigate to the **Menu** or **Shortcuts** tab.
3. On the tab, click the **Add** (or **Add Shortcuts**) button.
4. In the **Search** bar, type a key term or the name of the option. For example:
   - For the Menu, you might search '**Fiscal Admin'** to add the Fiscal Admin Dashboard.
   - For shortcuts, you might search '**Spotlight**' to add your favorite spotlight report(s).
5. Click the **(+)** to add the item.
6. To view the changes, click **Back to Menu**.
7. Select the recently added Menu or Shortcut item to navigate to the appropriate report. Different prompts or windows may display to access the desired report.

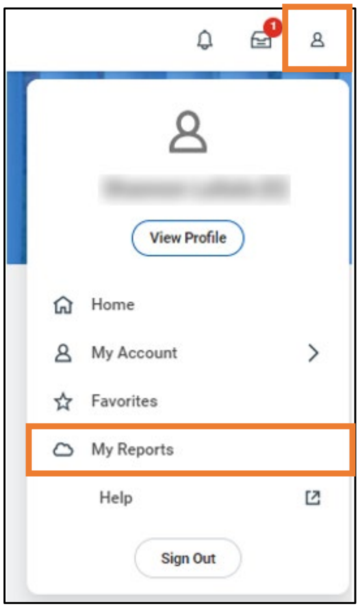


Access Reports from My Reports

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 picture.
2. Select **My Reports.**



On the **My Reports** screen:

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

Add & Manage Favorites for Reports

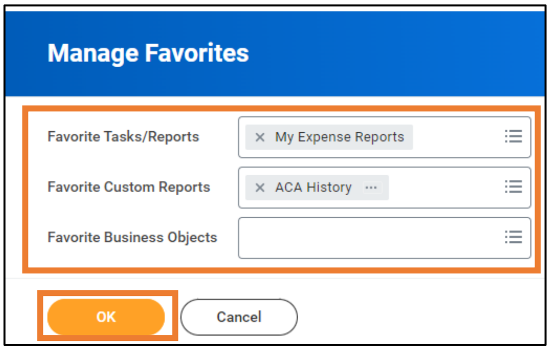
On the **Workday Home** screen:

1. Type **Manage Favorites** in the Workday search bar and select the task (or select your **Profile** picture > **Favorites** > **Manage Favorites**).

On the **Manage Favorites** screen:

2. Enter the following fields:
   - **Favorite Tasks/Reports** – Search the specific non-custom report that you want to add as a 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 for the custom report you want to add as a favorite. You can also scroll through the list of available custom reports that can be added to **Favorites.**
   - **Favorite Business Objects** – Leave this field blank.

3. Click the **OK** button.

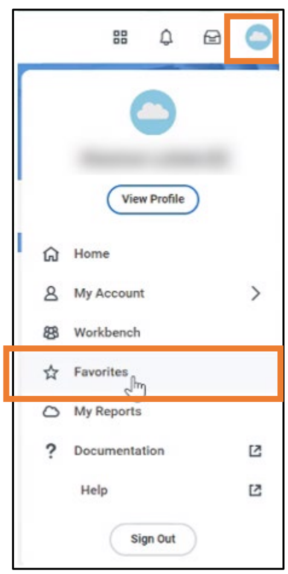


On the **Manage Favorites** screen:

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** picture and select **Favorites.**



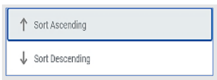
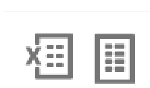
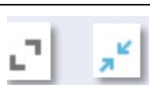
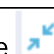
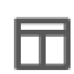
On the **Favorite Reports and Tasks** screen:

7. Select the **report** you want to view. You can navigate through the different tabs to view other reports that you added to your favorite lists.

	You can also manage **Favorites** by using the **Favorites app.** To add this app to your list of apps in your Menu, follow the steps in [Access Reports from Workday Menu or Shortcuts]().

Review Report Functions

The table below describes functionality available for reports in Workday. Each function displays via an icon when viewing a report. Several of the icons display at the top right of 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. Click a column header to access the sort function.
	**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 can be used to return to the Prompts window to change the search criteria for the report. Clicking this icon will open the Prompts screen and retain any previous selections.
	**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: a) **Freeze** a column, by dragging the column name to the freeze pane. You can only freeze one column at a time. b) **Hide** a column by deselecting its checkbox. c) **Reset** your table view by clicking on the reset button. d) **Reordering** is accomplished by dragging columns to a specific order. e) Select **Apply** to apply changes.

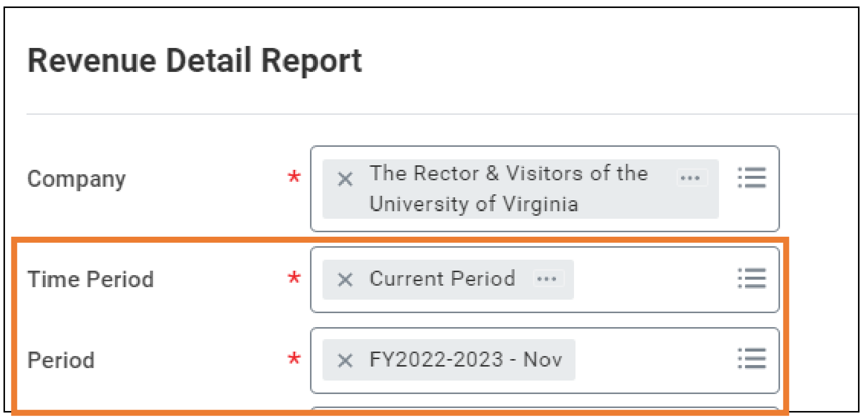
	If you filter the report from within the report itself to reduce the data and then export it, it will still export ALL the rows returned in the original request. To export a subset, you will need to run the report again by selecting the **Change Selection** icon to restrict your data.

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 *in relation* 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.



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.
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.