



REPORT STREAMLINING 



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1

UBI Financial Analysis & Reporting Apps 2.0

2

Workday Report Catalog – Usage Review and Recommendation



UBI FINANCE 2.0

- **UBI 2.0**

- Managing app performance & data volume
- Updated User Experience
- Consistency (Design/Fields/Formulas)
- Optimizing code and UI for future maintenance

- **Timeline**

- New apps available June 25
- Change Management & User Assistance* Summer 25
- Governance Plan Summer 25
- Selected 1.0 apps retired Sept 25

**Personal and Custom/Shared Sheets in retired apps will need to be recreated in the new apps*

- **New apps (Round 1)**

- Workday Ledger Details (FY22, FY23-24, FY24-25, FY25-26)
- Financial & Managerial Reporting (inc BvA & FB)

- **To be retired** (Round 1)**

- WD Journal Lines
- WD Journal Lines Actuals
- WD Journal Lines Inc Statement
- WD Financial Reporting
- WD Budget vs Actuals
- WD Fund Balances
- WD NACUBO Function Analysis

***Apps not listed here will continue to be available and will be reviewed and evaluated in Round 2 later in FY26*

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YTD Dashboard

Navigation: Overview | Information | Journals | Analytics | Details | Dictionary

Users creating Journals
325,57%
Users creating Transactions

Q1 Amount	Q1 Count	Q2 Amount	Q2 Count
341.6M	78,26k	341.6M	78,26k
383.1M	644.2k	383.1M	644.2k

Operating Expenses (PTYD vs PTD)

Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)
Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)

Net Sales

Net Income

YTD Expense
29.45M

of Manual Journals, Transfers, Accts Pay, PMA/PTYD vs PTD

Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)
Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)

of Expense Reports (PTYD vs PTD)

Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)
Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)

of Supplier Invoices (PTYD vs PTD)

Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)
Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)

of YTD Expense by Journal Source

Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)
Operating Expenses (PTYD vs PTD)	Operating Expenses (PTYD vs PTD)

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WORKDAY FINANCE REPORTS

- Core set of common reports for end users
- Enhance report definitions
- Usage Analysis
- Spotlight Catalog Review
- Timeline
 - Analysis & Recommendations May 25
 - Reporting Library/Catalog Revisions June-July 25
 - Communications July-August 25

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