

Reports in Workday

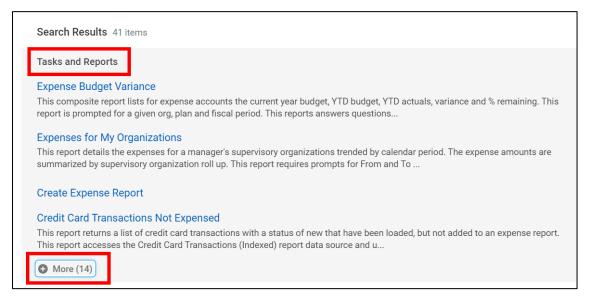
Workday provides numerous **Standard Reports** which can be adjusted to fit the enduser needs. These reports can be exported to Excel in order to work with the data or can be filtered and saved within Workday. Reports appear on **Dashboards** using live data which can be drilled into. This provides the end user with real-time, accurate data to assist with the completion of business processes and data analysis. There are also **Custom Reports** by Functional Area within Workday that have been configured based on MSU specific needs and business processes.

How to Access Standard Reports

1) From the Search field, search keywords or the name of the report.



2) Under the *Tasks and Reports* section, locate & click the name of the report to be run. **Note:** Select **More** to expand the list of search results.



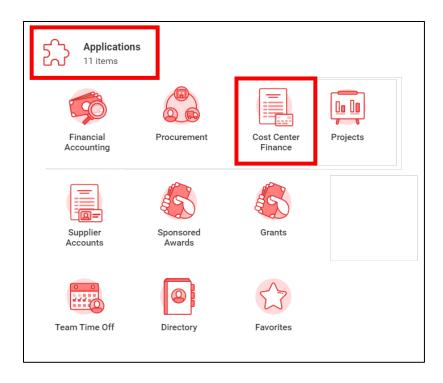
3) Depending on the report, enter parameters if applicable. For example, when running the **My Expense Reports** report, the report can be filtered down by Expense Report Status. Or, this field can be left blank to show all expense reports within the specified date range.

Expense Report Status			:=
Report Date On or After	09/13/2019 📄		
Report Date On or Before	11/13/2019 💼		
My Expense]	
My Expense Expense Report Status	e Reports		
		:=	
Expense Report Status	search Approved Canceled Draft	:=	
Expense Report Status Report Date On or After	search	:=	

4) Click **OK** to view report

Access Reports Related to Functional Area

1) From the Homepage, under the Applications section, click the **Application** icon related to the functional area. For this example, we will access the reports related to the **Cost Center Finance** which will be used by Requisitioners



2) On the right- side of the screen, under **Reports**, is a list of reports related to this functional area that are frequently used in relation to business processes. **Note:** Click **More** in the Reports list to expand and view the full list of reports available.

	Tasks	
	Create Requisition	>
	Create Supplier Invoice	>
ē	Reports	
	R081 Find Suppliers for Requester	>
	R204 Requisition Lifecycle	>
	R002 Operating Budget Variance for Organization	>
	More (6)	
D	Links	
	Bank of America Works	2

Using Workday Reports

You can easily manipulate the information that displays in your selected report, including filtering the information and exporting the list to Excel. You can also choose to have the report exported as a .pdf so that you can print it out.

Exporting a Report to Excel

1) From within the report, in the upper right corner of the report, click on either one of the two **Excel** icons.

Note: If you click on the top icon, you will get the entire header of the report. If you click the bottom icon, you will only get the header row of the report.

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Include (Cash Sales	No				
17 items						տեւ
						100 LL L -
Payment	Transaction ID	Payment Date	Customer	Payment Status	Application Status	100 [11] E *

2) The entire report exports into an Excel worksheet. If it displays as minimized on the Task Bar at the bottom of the screen within the browser, click the Excel icon to open the file.

Printing a Report

1) From within the report, click the **Print** icon

Include	Deposited Paymen	ts Yes Over	payment No			
Include	Cash Sales	No				
17 items					x =	
17 items					X =	┉╓╷
	Transaction ID	Payment Date	Customer	Payment Status		
	Transaction ID	Payment Date	Customer	Payment Status	X =	

2) Workday exports the report as a .pdf. If it displays as minimized on the Task Bar, click the .pdf icon to open the file.

Saving a Favorite Filter

If you repeatedly run reports using the same filter data, you can save the filter setting in order to save time.

1) When selecting the parameters of a report, once a field has been completed, hover the cursor over the field, **right click** and select **Copy Text**.

Company	X Montclair State
Customer	× Edge Hill University ∷
Customer Category	X Customore A - I
Customer Group	Copy URL
Payment Date On or After	MM / DD / Copy Text
Payment Date On or Before	MM / DD / View Printable Version
Payment Status	× Approv

2) Scroll to the bottom of the page (DO NOT run report), and in the **Saved filters** section, right click the cursor into the **Filter Name** field and select **Paste**.

Filter Name		
lanage Filters Saved Filters	Save	

Ра	yment Type	Emoji	Win+Period
т		Undo	Ctrl+Z
Ira	ansaction Refe	Redo	Ctrl+Shift+Z
	hude Demosite	Cut	Ctrl+X
Inc	lude Deposite	Сору	Ctrl+C
		Paste	Ctrl+V
Inc	lude Cash Sal	Paste as plain text	Ctrl+Shift+V
		Select all	Ctrl+A
Ov	erpayment	Spell check	
		Writing Direction	
		Get image descriptions from Google	9
	Filter Name –	Inspect	Ctrl+Shift+I
	Manage Filters 0 Saved Filters	Save	

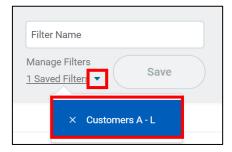
3) Click the **Save** button.

Customers A - L		
Manage Filters 0 Saved Filters	Save	

The newly saved filter appears in the Saved Filters list.

4) Click the down arrow to expand/view/use saved filters.

Filter Name	
Manage Filters	
1 Saved Filters 🔻	Save



Filtering a Report

Once a report has been run in Workday, you may want to focus on some specific data. You can filter the displayed information of a report based on data within the report.

1) From within the report, click the **Filter** icon.

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17 items					X	┉ ☶ ╴
	Transaction ID	Payment Date	Customer	Payment Status	Application Status	<mark>010 ⊞ -</mark> "

2) Click Add.

	X	· 00 🗆 •
C Accoui Amoui	Filter Did you know you can also filter and sort by clicking on column titles?	Payme
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0.0	K	Letter o
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200.0	or Add a new filter here	Check
0.0	Add	Check
0.0		Check

3) Select the item to filter the report from the dropdown menu. **Note:** Filters can be applied to multiple fields.

Add Filter
Column \star select one 🔹
Filter Cancel
In Progress Unapplied

4) After selecting the filter criteria (for this example we used Payment), click Filter.

Column	*	Payment	•
Filter Condition 🔸		is	▼
Value 🔸		× CP-00000005-08/08/2019 - 75.00-USD	≔
		× CP-00000004 - 07/23/2019 - 100.00 - USD	

The report automatically displays the data based on the filtered criteria.

Adding a Chart to a Report

1) From within the report, click the **Expand/Collapse Chart** icon.

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17 items					X =	┉ ๓ ╴
Payment	Transaction ID	Payment Date	Customer	Payment Status	Application Status	4
Q	CP-00000017	09/11/2019	Continued Professional	In Progress	Unapplied	-

A default chart is displayed above the report.

2) Click the **Configure** icon to change the chart type.

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nclude Cash Sales	No	-			1
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400		-	And a second sec	An and a second se	-
300		Clustered Bar	Stacked Bar	100% Bar	
200		1	~	~	
100		Overlaid Area	Stacked Area	100% Area	-
0					
CP-0000000	CP-0000000 CP-0000001 CP-0000000 CP-0000000 CP-0000001 CP-0000001	 Configure			-

3) Additionally, click the **Configure** link to change the variables contained in the chart.

