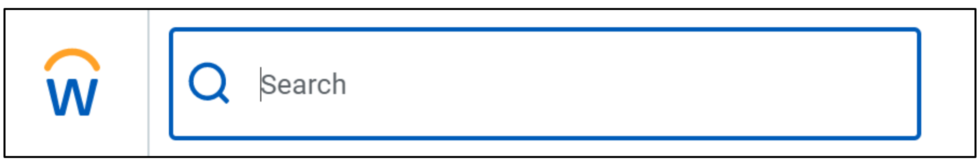
Workday: Reports Overview

Reports in Workday

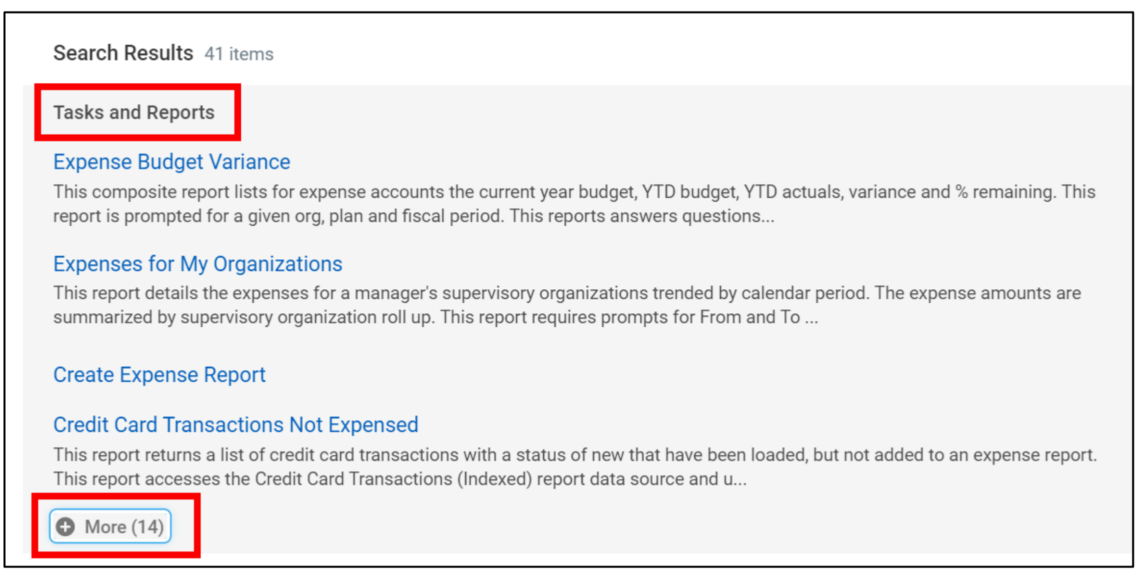
Workday provides numerous **Standard Reports** which can be adjusted to fit the end-user needs. These reports can be exported to Excel in order to work with the data or can be filtered and saved within Workday. Reports appear on **Dashboards** using live data which can be drilled into. This provides 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

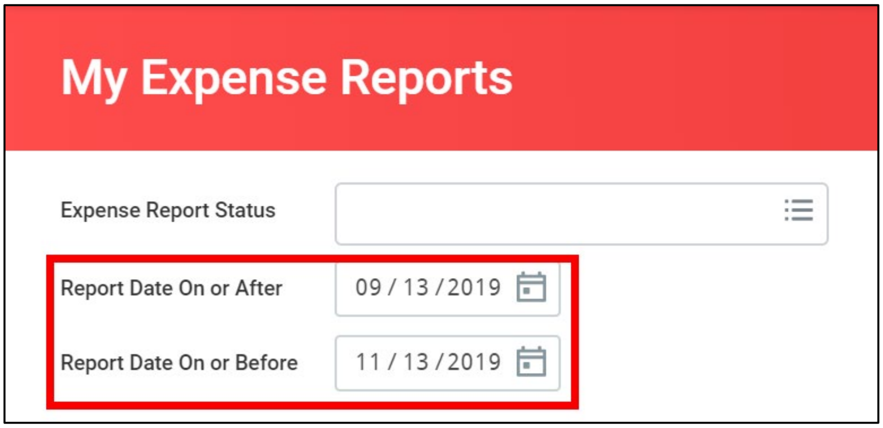
1) From the **Search** field, search keywords or the name of the report.

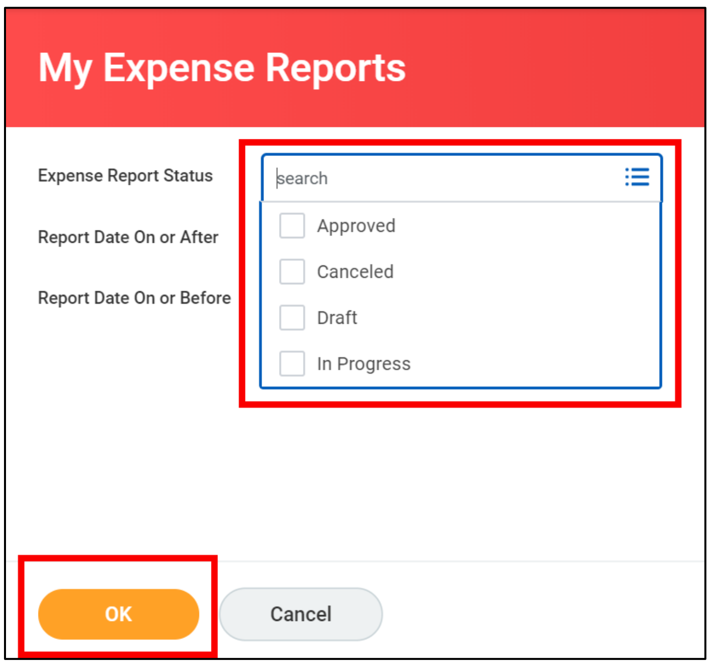


2) Under the *Tasks and Reports* section, locate & click the name of the report to be run. **Note:** Select **More** to expand the list of search results.



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.

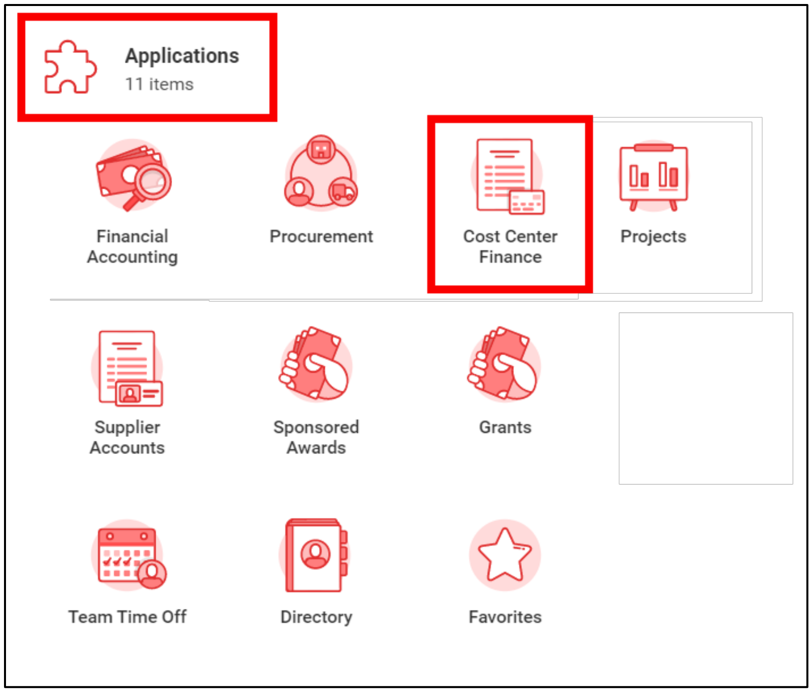




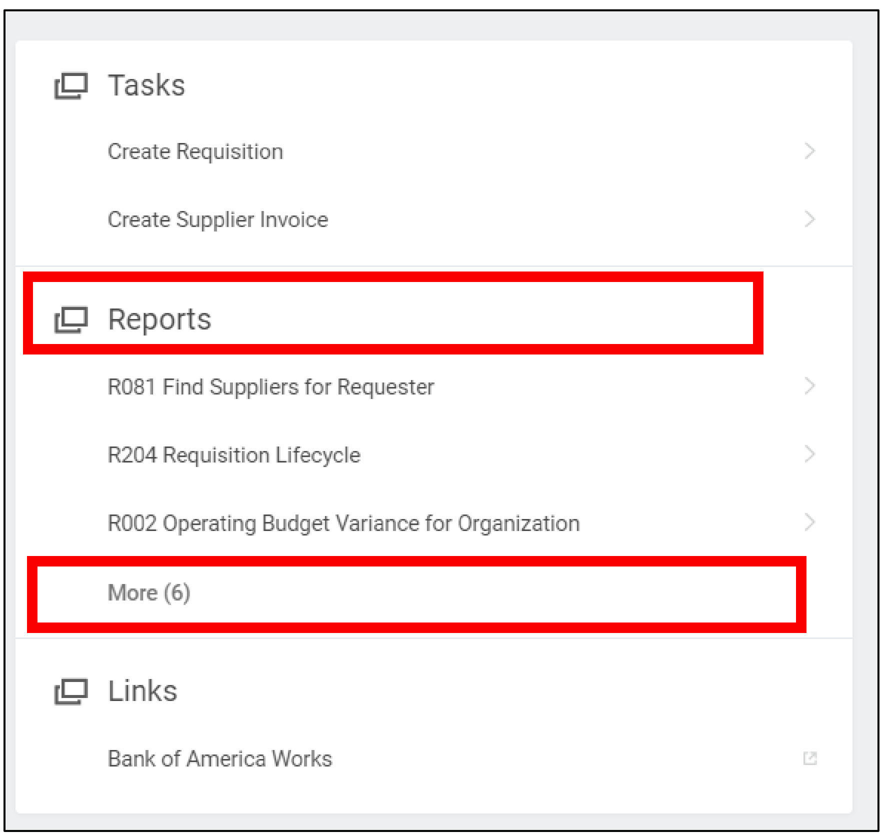
4) Click **OK** to view report

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.

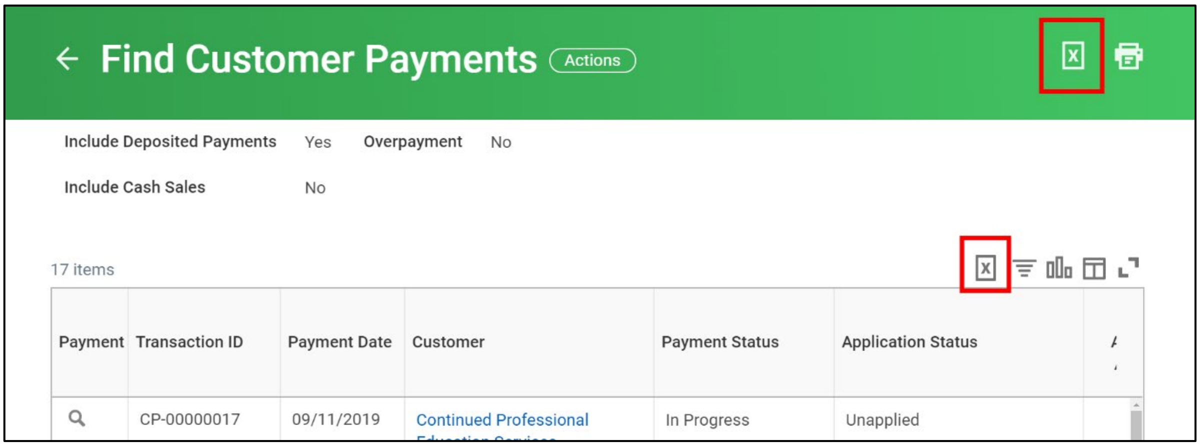


Using Workday Reports

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

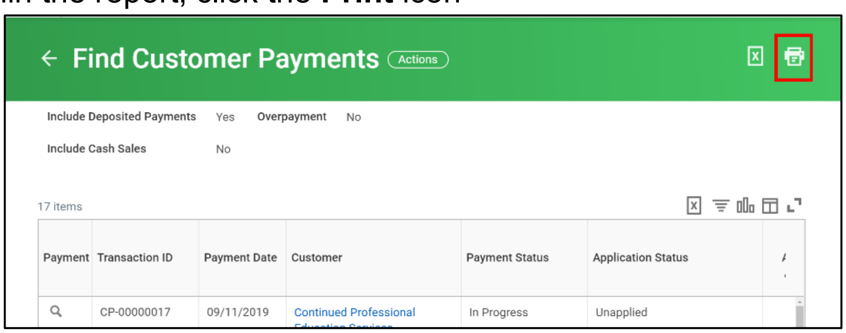
1) From within the report, in the upper right corner of the report, click on either one of the two **Excel** icons.
   Note: If you click on the top icon, you will get the entire header of the report. If you click the bottom icon, you will only get the header row of the report.



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

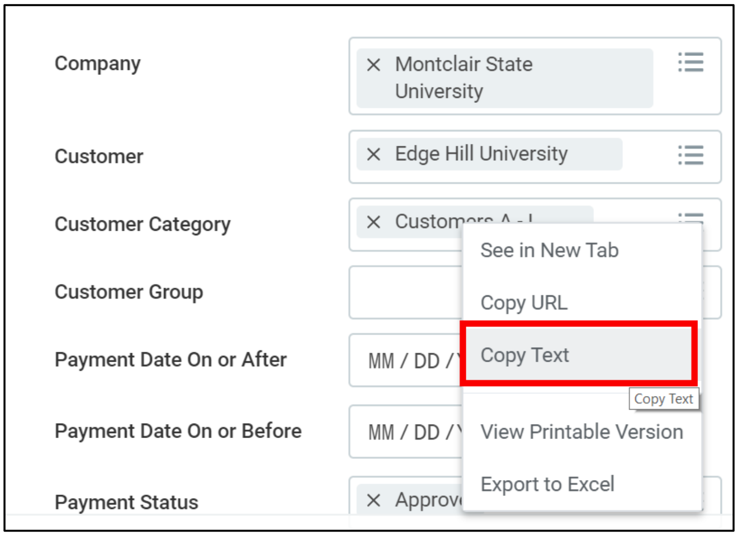


2) Workday exports the report as a .pdf. If it displays as minimized on the Task Bar, click the .pdf icon to open the file.

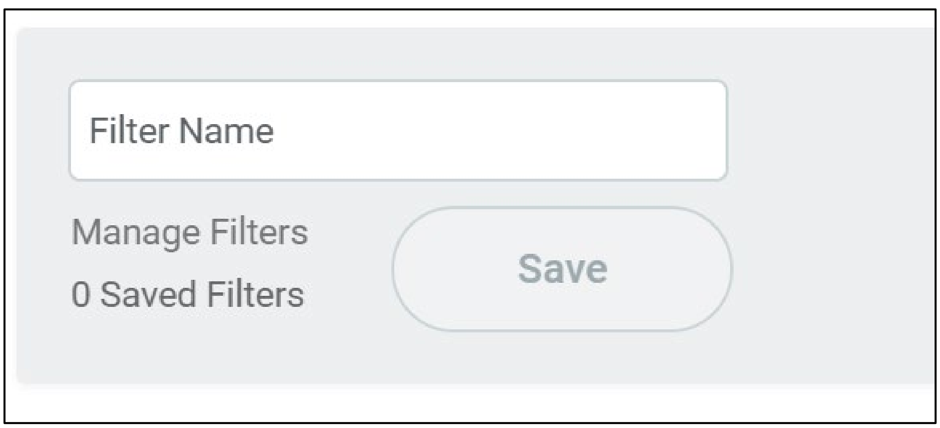
Saving a Favorite Filter

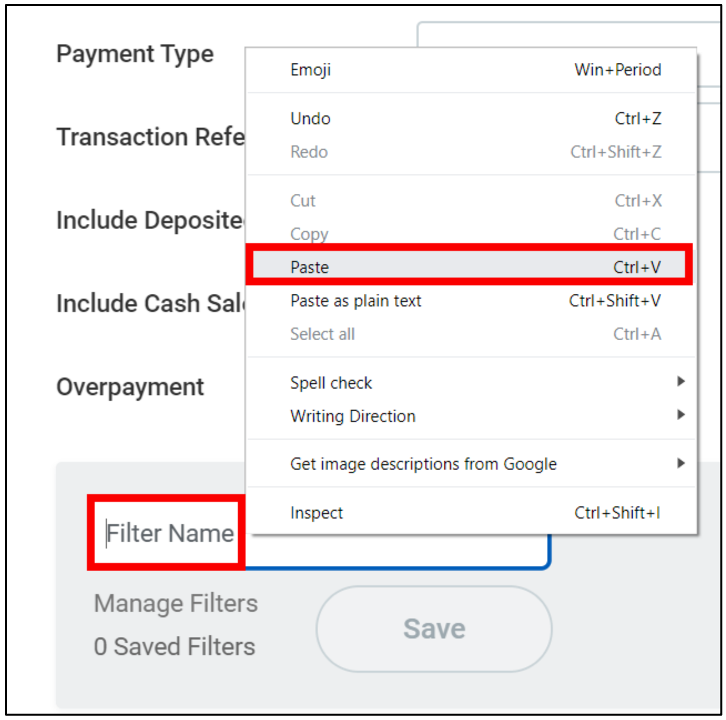
If you repeatedly run reports using the same filter data, you can save the filter setting in order to save time.

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.**

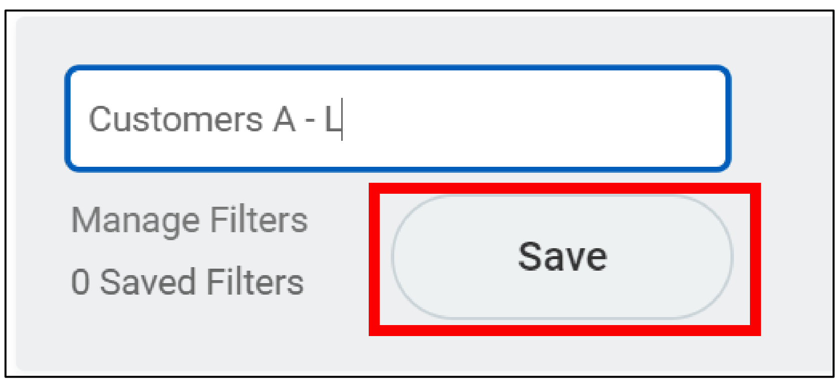


2) Scroll to the bottom of the page (DO NOT run report), and in the **Saved filters** section, right click the cursor into the **Filter Name** field and select **Paste**.



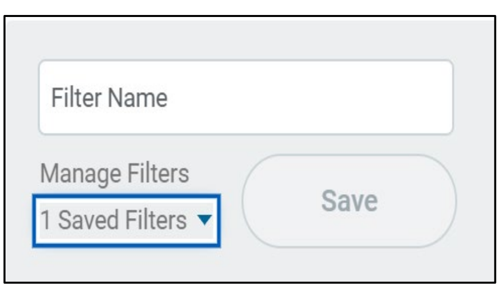


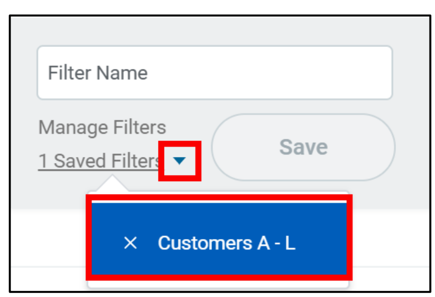
3) Click the **Save** button.



The newly saved filter appears in the **Saved Filters** list.

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

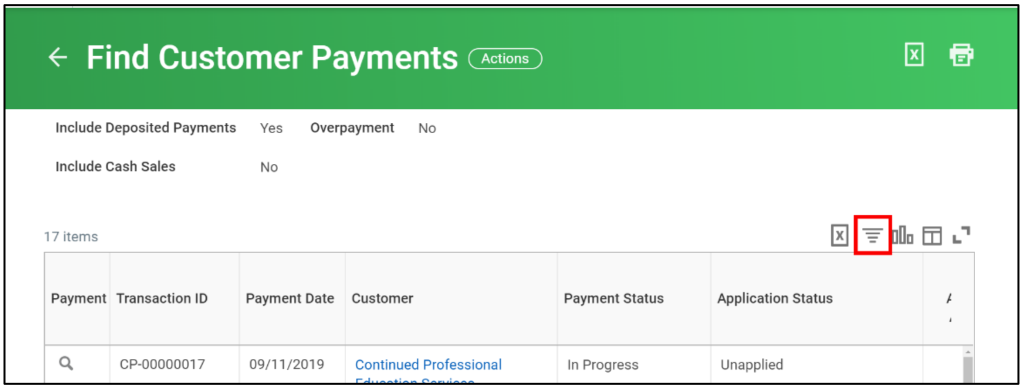




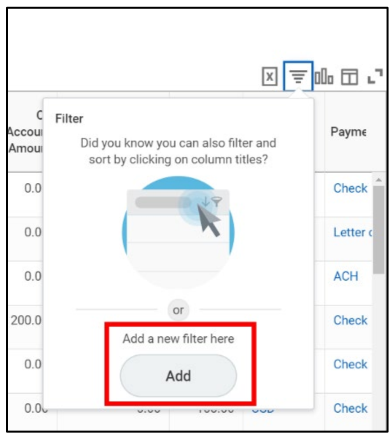
Filtering a Report

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.

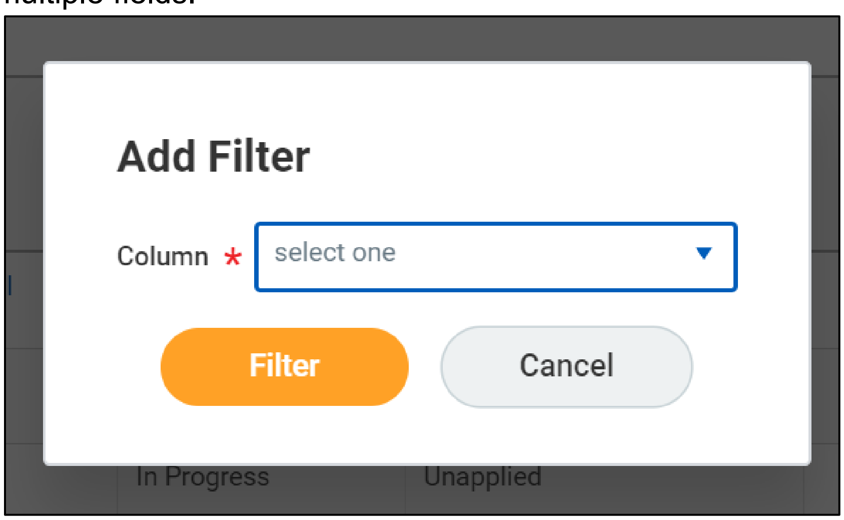
1) From within the report, click the **Filter** icon.



2) Click **Add**.



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



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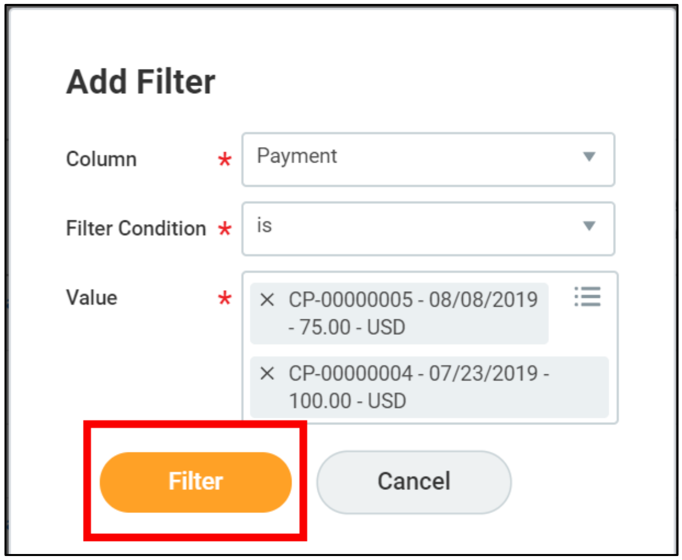
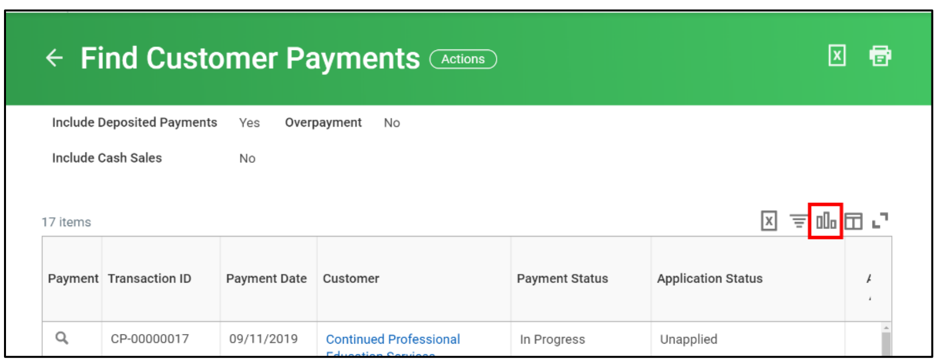
4) After selecting the filter criteria (for this example we used Payment), click **Filter**.



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

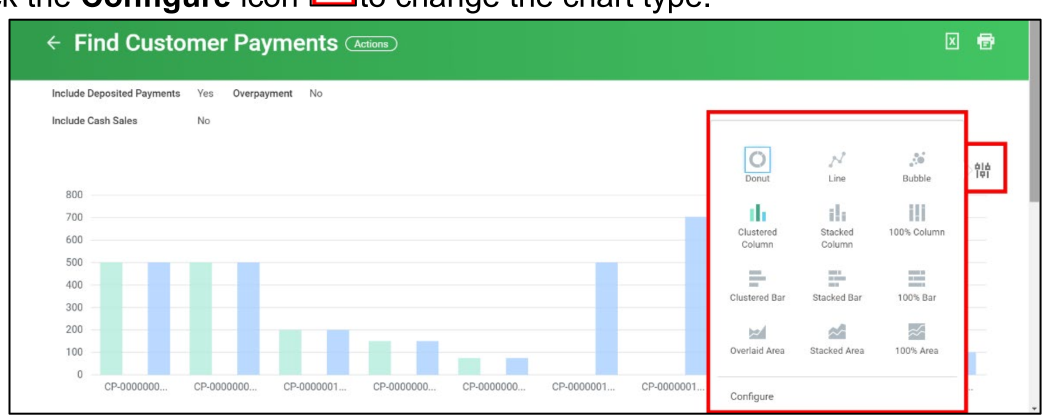
Adding a Chart to a Report

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



A default chart is displayed above the report.

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



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