



Overview:

This job aid provides step-by-step guidance on how to navigate reports and dashboards in Workday. In addition, it provides a listing of reports often used by managers. Depending on your role, you may have additional reports available to you.

This Job Aid includes:

- [Common Reports for Managers](#)
- [Accessing Reports](#)
- [Executing Reports](#)
- [Save Report Filters](#)
- [Sort, Filter, and Export Reporting Data](#)
- [Use Notify Me Later, My Reports, and Process Monitor](#)

Common Reports for Managers

The listing below provides commonly used reports by managers:

1. **All Worker Time Off Report** – Includes future time off requests to assist managers with scheduling
2. **Time Off by Period** – Assists managers in answering team member questions regarding their PTO balance.
3. **Time Off Balance** – Highlights team members' Time Off balance, including PTO and sick time. This report also highlights carryover or PTO time forfeited during the period.
4. **Headcount** – Provides visibility into filled/unfilled positions and active/inactive direct reports.

Access Reports

You can access data and reports in multiple ways:

1. **Search bar** → If you already know the report name, type the name of the report in the **Search** bar.

Note: If you type the name of a report into the search bar and nothing comes up then you might not have the necessary security to run/view the report or the report itself is named differently.



Workday Reporting

Audience: Manager

Q headcount

- Headcount & Open Position Analysis Report
- Headcount Analysis Report
- Headcount Analysis for My Organizations Report

2. **Team Applications** → Host information and provide dashboards to help manage your direct reports. (e.g., My Team)

Menu

Apps Shortcuts

- My Team Management
- My Team
- Team Time
- Team Time Off
- My Team's Work

Actions

- Business Title Change
- Manage Succession Plan
- Edit Job Requisition
- Edit Job
- More (4)

View

- My Org Chart
- Timeline
- Headcount
- Organization Directory
- My Leadership Roles
- More (22)

3. **Dashboards Application** → The Dashboards application collects the most relevant information about a specific business process on one screen. (e.g., Team Absence or Team Time)

Menu

Apps Shortcuts

- Team Absence

Team Absence

Tasks

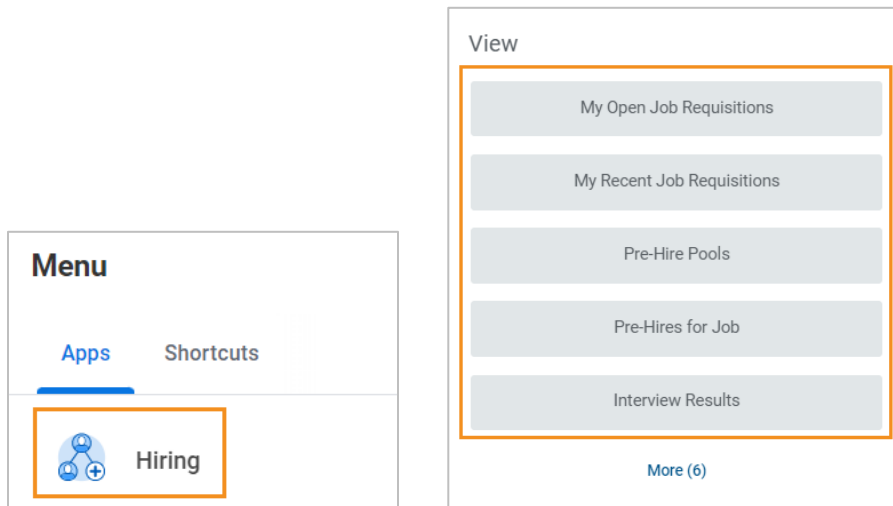
- Team Absence Calendar >
- Time Off & Leave Calendar >
- Return Worker from Leave >
- More (4)



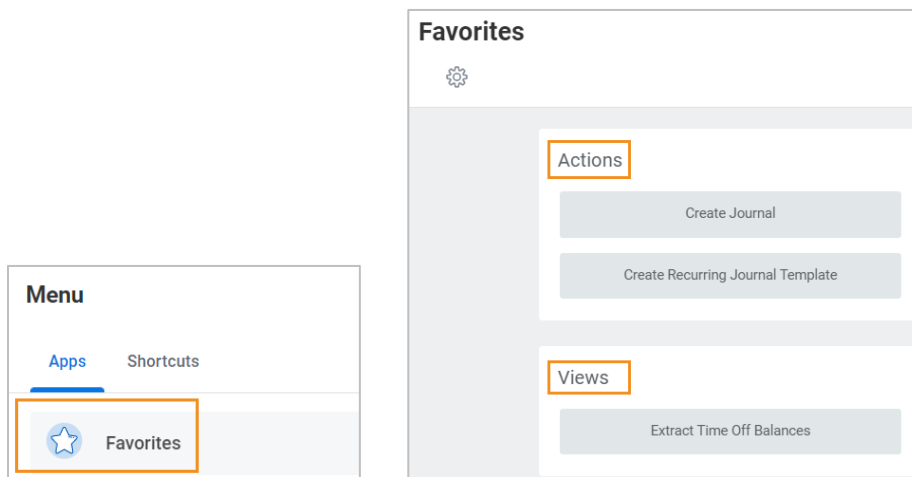
Workday Reporting

Audience: Manager

4. **View Menus** → Applications with **View** menus offer quick access to process-specific data (e.g., Hiring worklet displays requisition and position reporting).



5. **Favorites Application** → Like bookmarks, this is a custom application you can add to your **Home** page to store your commonly initiated tasks (Actions) and reports (View).



Executing Reports

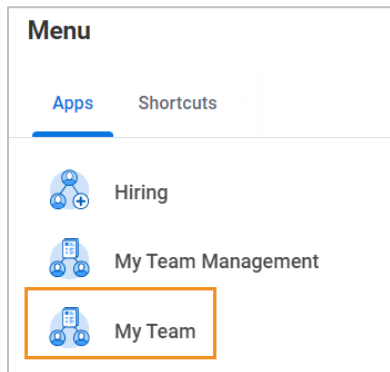
There are many types of reports you can access within Workday. These reports are typically listed in the View column of worklets/apps located in the Apps section on the Global Navigation Menu. The below information provides an overview of the different actions you can take on a report.



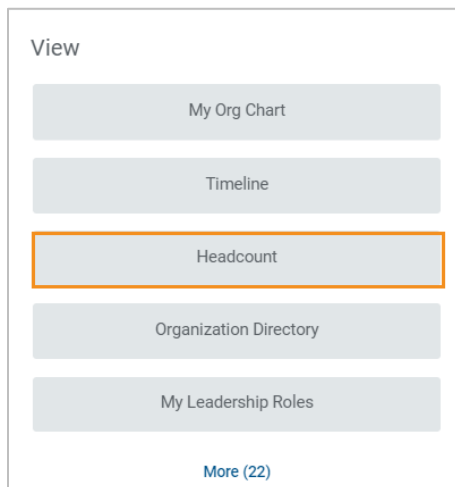
Workday Reporting

Audience: Manager

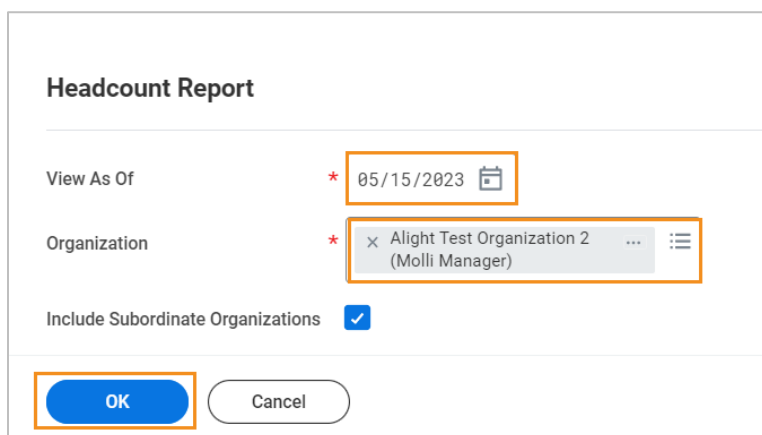
1. Select a worklet or dashboard from the Global Navigation menu.



2. In the View column, select a **Report**.



3. Enter the report **Criteria**. Click **OK**.





Workday Reporting

Audience: Manager

- Review results. Numbers in blue are links that can be clicked, to drill down into additional details.

Headcount Report [Alight Test Organization 2 \(Molli Manager\)](#) [More] [Print] [PDF]

View As Of: 05/15/2023
Include Subordinate Organizations: Yes

Workers | Positions

Workers 1 item [Grid] [List] [Filter] [Sort] [Refresh] [Print] [PDF]

Organization	Workers	Active Employees	Inactive Employees	Contingent Workers
Alight Test Organization 2 (Molli Manager)	41	41	0	0
Total:	41	41	0	0

Save Report Filters

If you run a report frequently, some reports allow you to save your preferred criteria setting for future reports.

- Complete search criteria, as necessary.

Find Journal Lines

Company	* <input type="text" value="x MCC Mobile County Commission"/>
Year	* <input type="text" value="x 2023"/>
Period	* <input type="text" value="x Q1"/>
Ledger	<input type="text"/>

Extract Time Off Balances

Company	<input type="text" value="x MCC Mobile County Commission"/>
Location Address - Country	<input type="text"/>
Worker Types	<input type="text"/>
Employee Type	<input type="text"/>
Contingent Worker Type	<input type="text"/>
Worker	<input type="text"/>



Workday Reporting Audience: Manager

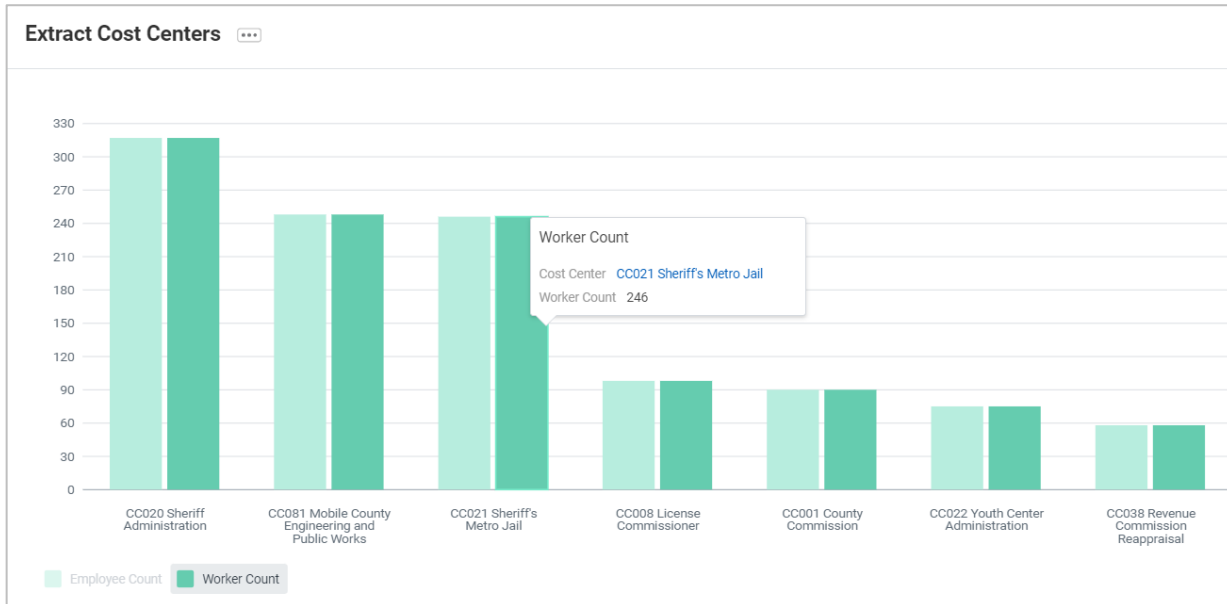
2. Scroll down to the gray filter area at the bottom and enter a filter name. Click **Save**. Then click **OK** to run report.

A screenshot of the Workday filter interface. At the top, a text input field contains 'Q1 Journals'. Below it, there are two buttons: 'Manage Filters' and 'Save'. Under 'Manage Filters', it says '0 Saved Filters'. At the bottom of the interface, there are two buttons: 'OK' and 'Cancel'.

A screenshot of the Workday filter interface. At the top, a text input field contains 'MCC Time Off Balances'. Below it, there are two buttons: 'Manage Filters' and 'Save'. Under 'Manage Filters', it says '0 Saved Filters'. At the bottom of the interface, there are two buttons: 'OK' and 'Cancel'.

Sort, Filter, and Export Reporting Data

1. Reports may display results with a graphical representation.
 - a. Hovering over the colored bars/wedges will display more information about that population.
 - b. Clicking on the bars/wedge allows you to view details and/or drill into that subsection only.



2. Reports may display results in a table format.
 - a. Clicking the tag, printing to PDF, and/or exporting to Excel to filter, sort, and reorder columns icons will allow you to manipulate how the reports appear on screen.
 - b. Clicking the column headings of the data will allow you to filter or sort the data by choosing a filter condition.

Workday Reporting Audience: Manager



Extract Cost Centers ...

174 items

Cost Center	Reference ID	Company Restrictions	Cost Center Code	Subtype	Included by Organizations
110 Treasury - Special Gas Excise	CC_Treasury_Special_Gas	↑ Sort Ascending ↓ Sort Descending			All Agency Cost Centers
709 Worker Compensation Agency - Treasury	CC709	Filter Condition * is			All Agency Cost Centers
721 Petty Cash Recording Fees	CC721	Value * <input type="text"/>			All Agency Cost Centers
722 Treasury - License Commissioner	CC722	<input type="button" value="Filter"/>			All Agency Cost Centers
725 Individual Redemption	CC_Ind_Redem				All Agency Cost Centers
751 Sheriff's Requisition	CC751	MCT Mobile County Treasurer	751	Cost Center	All Agency Cost Centers

Name	Icon	Description
Sort		Click any column header to open the sort pop-up. <ul style="list-style-type: none"> • Select Ascending or Descending. • Once a sort is applied, click the column header again and select Remove Sort to cancel sorting.
Expand/ Collapse		Click Chart icon to select a different type of chart. Note: Chart types include pie, column, bar, line, etc.
Export to Excel		Click xls icon to export the report data to Excel.
Filter data		Click Filter icon to view filter options.
Grid Preference		Click Grid icon to view/edit column (grid) options.
Full Screen Mode		Click Toggle icon to toggle the report to fill screen.
Print		Click Printer icon to print the report.
Related Actions		Click Related Actions button to display available actions within a report.

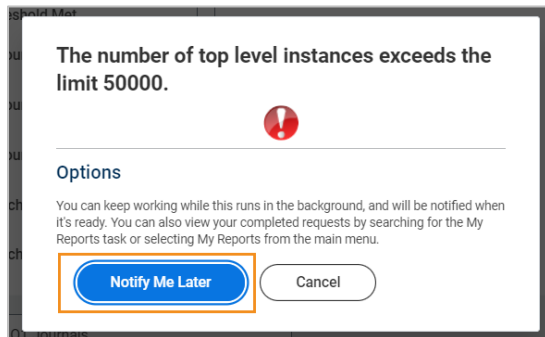
Use Notify Me Later, My Reports, and Process Monitor

When running larger reports, sometimes it takes additional time for results to display. Workday will notify you once the report run is completed.

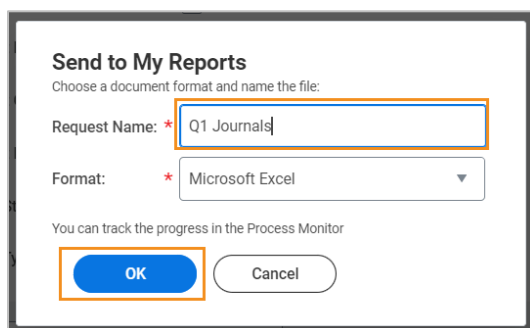


Workday Reporting Audience: Manager

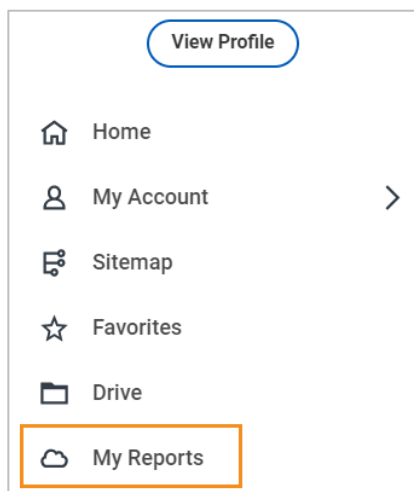
1. When the report data is not immediately returned, a pop-up box displays with an option to notify you once the report is generated. Click the **Notify Me Later** button.



2. In the **Request Name** field, type a filename that will help you identify the report. If you do not edit this field, it will default to My Report. Click the **Format** dropdown to choose Excel or PDF. Click **OK**.



3. Click the profile icon → **My Reports**

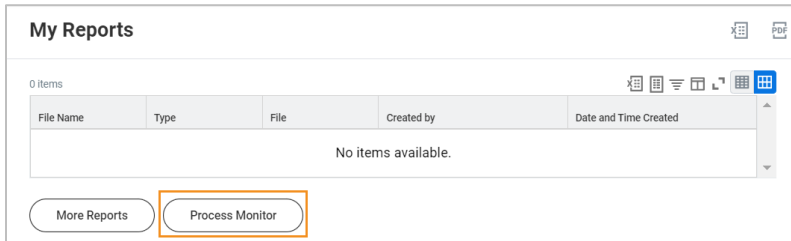




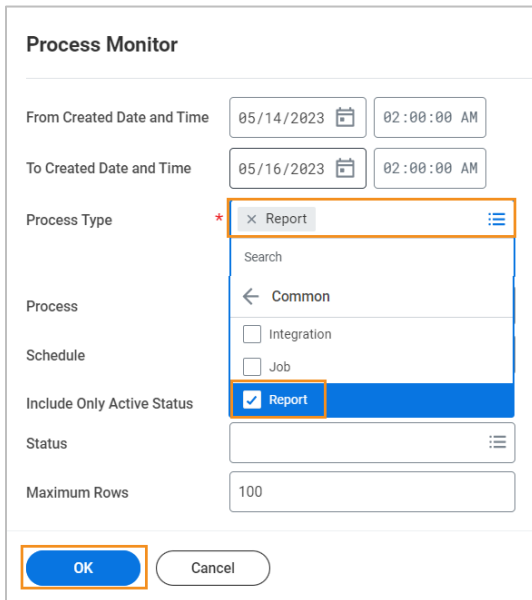
Workday Reporting

Audience: Manager

4. Click the **Process Monitor** button to view the progress of a report that is currently running.



5. From the **Process Type** menu, choose **Report**. Click **OK**.



6. Here, you can see the **Percent Complete** for each report and access the report once it has reached 100% completion. If the report is still processing, click the **Refresh** button to get updated completion percentages.

