Workday Reporting
Audience: Manager

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

The listing below provides commonly used reports by managers:

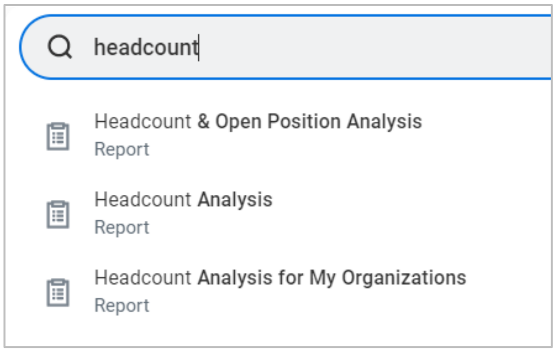
1. ***All Worker Time Off Report*** – Includes future time off requests to assist managers with scheduling
2. ***Time Off by Period*** – Assists managers in answering team member questions regarding their PTO balance.
3. ***Time Off Balance*** – Highlights team members' Time Off balance, including PTO 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

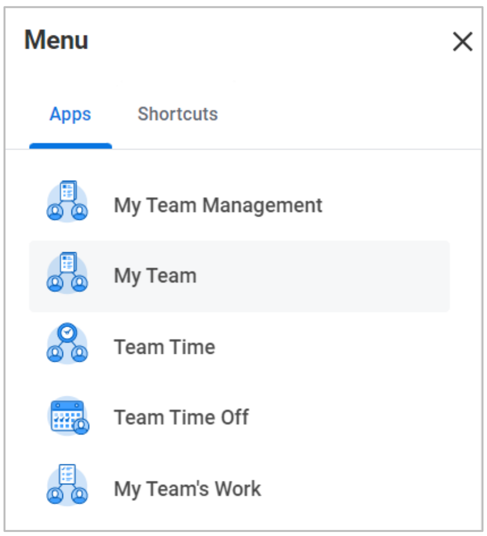
You can access data and reports in multiple ways:

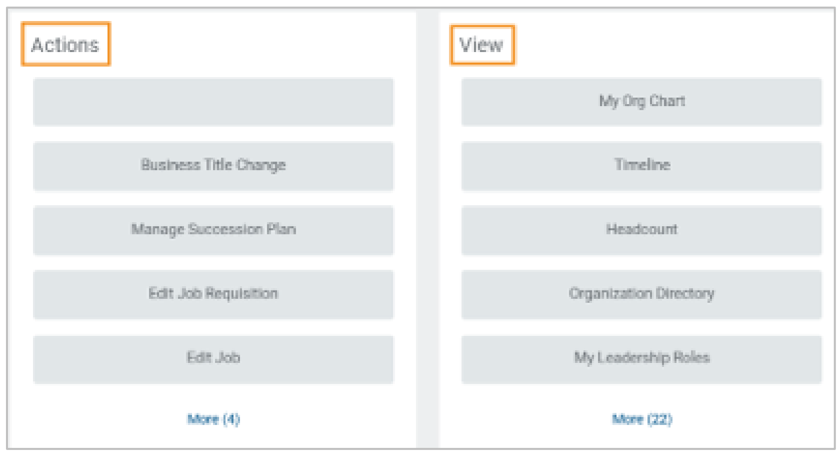
1. **Search bar →** If you already know the report name, type the name of the report in the **Search** bar.

   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.

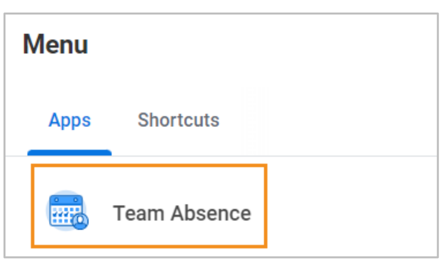


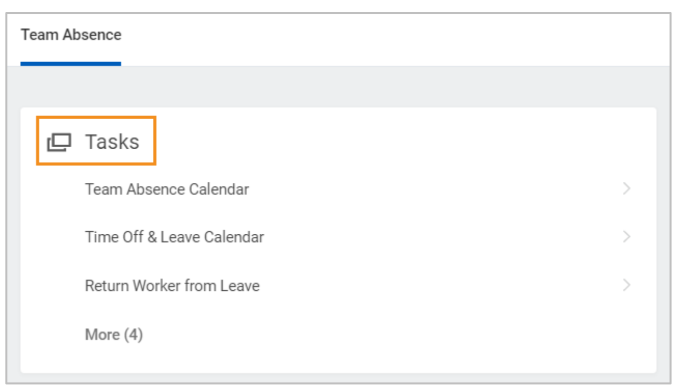
2. **Team Applications →** Host information and provide dashboards to help manage your direct reports. (e.g., My Team)



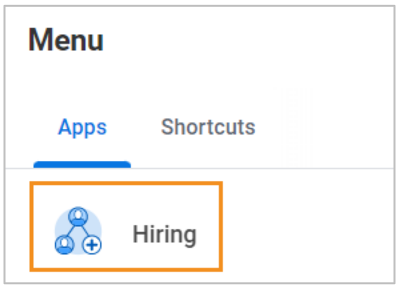


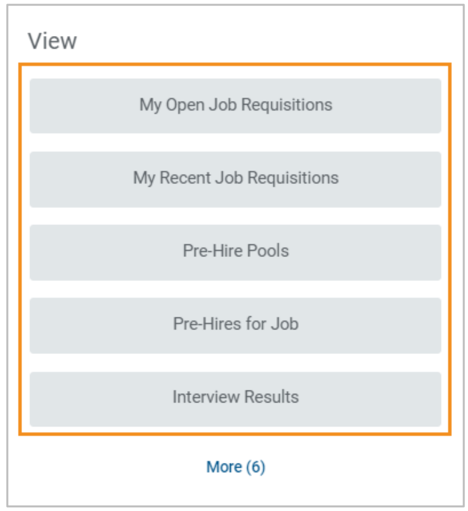
3. **Dashboards Application →** The Dashboards application collects the most relevant information about a specific business process on one screen. (e.g., Team Absence or Team Time)



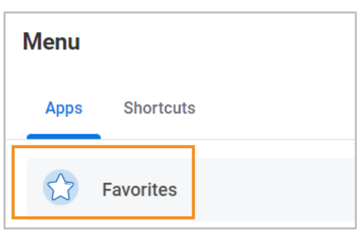


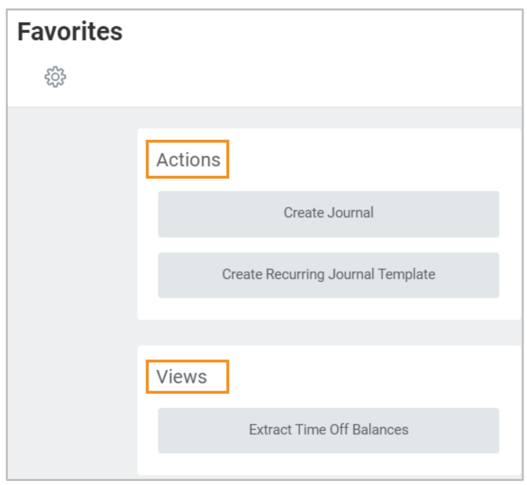
4. **View Menus** → Applications with **View** menus offer quick access to process-specific data (e.g., Hiring worklet displays requisition and position reporting).





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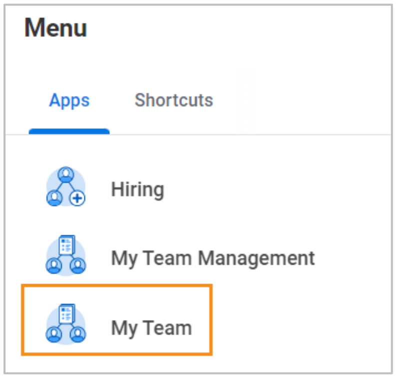
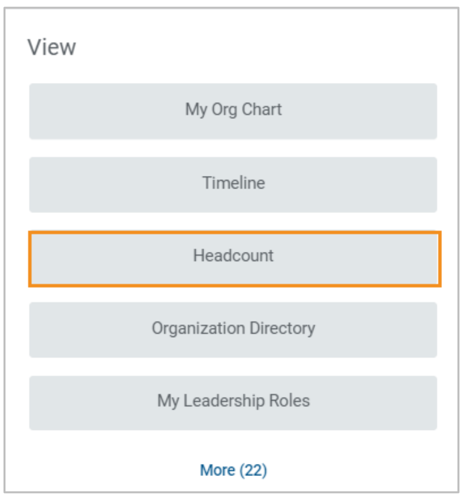
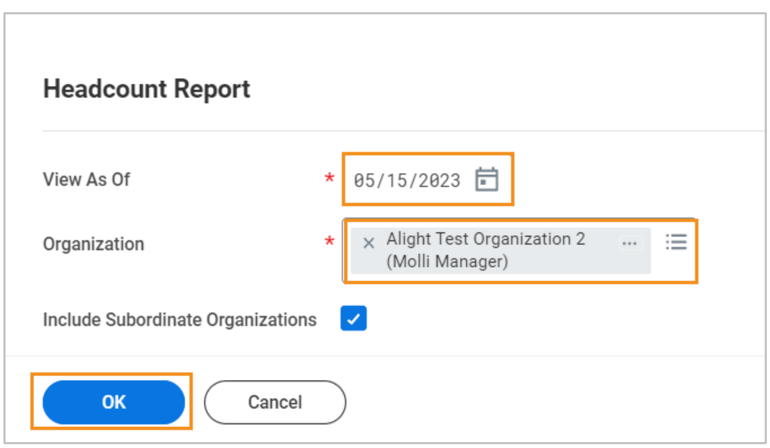
1. Select a worklet or dashboard from the Global Navigation menu.



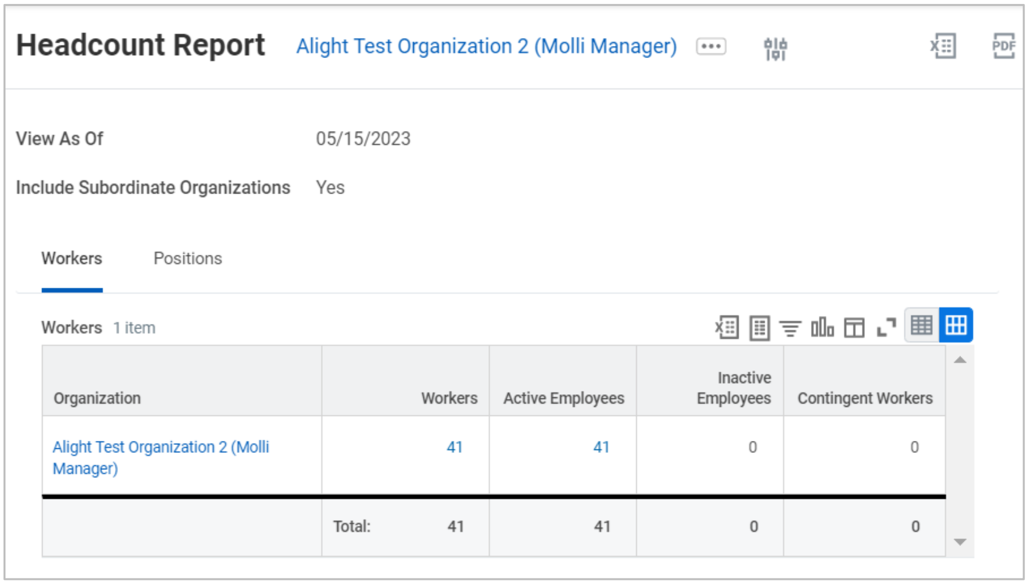
2. In the View column, select a **Report**.



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



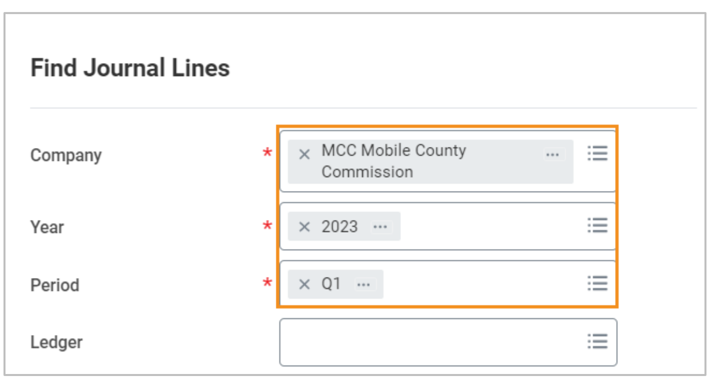
4. Review results. Numbers in blue are links that can be clicked, to drill down into additional details.

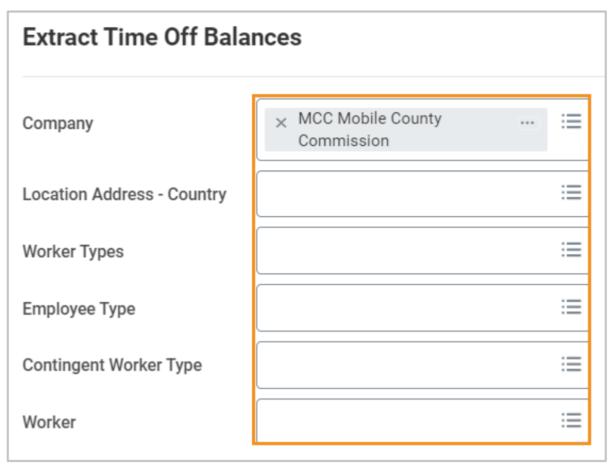


Save Report Filters

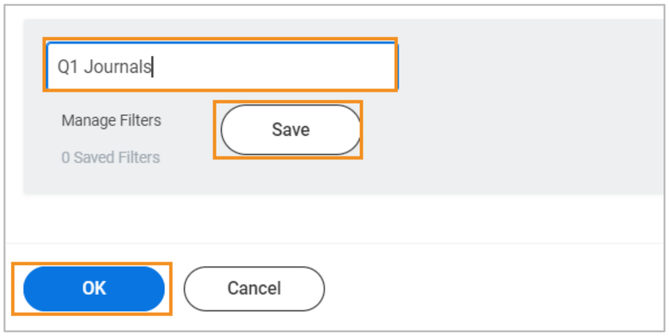
If you run a report frequently, some reports allow you to save your preferred criteria setting for future reports.

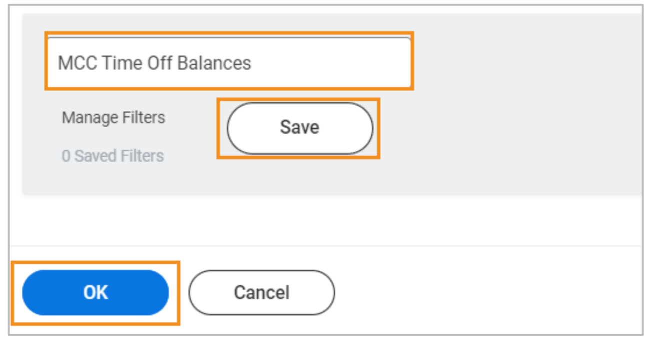
1. Complete search criteria, as necessary.





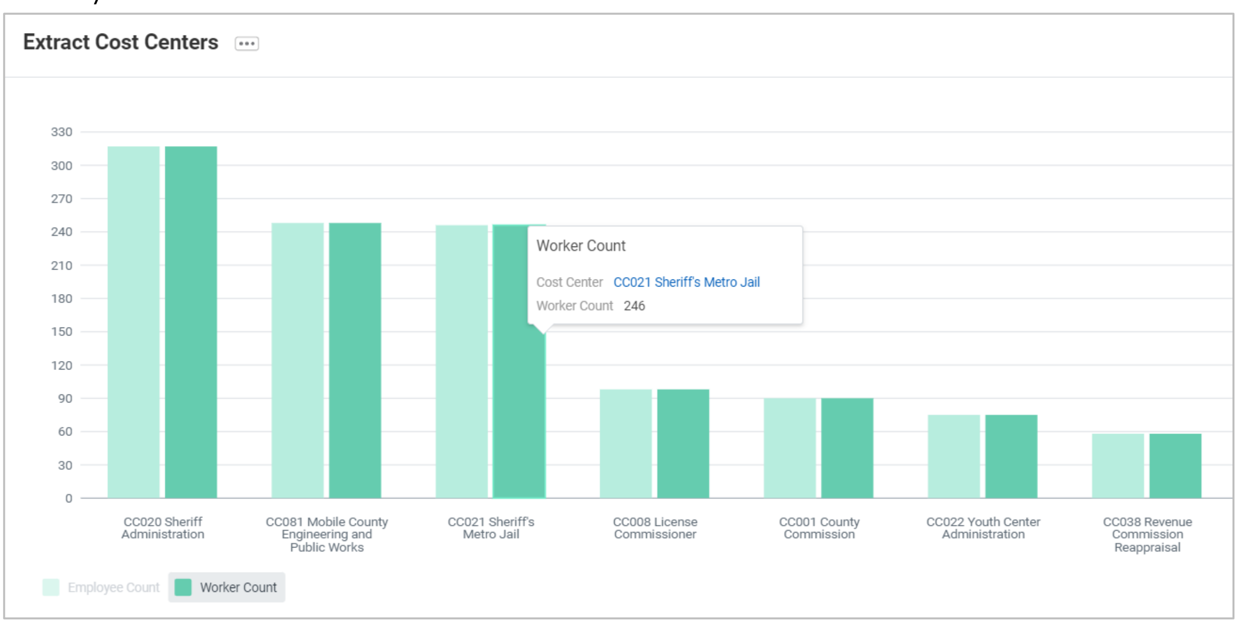
2. Scroll down to the gray filter area at the bottom and enter a filer name. Click **Save**. Then click **OK** to run report.



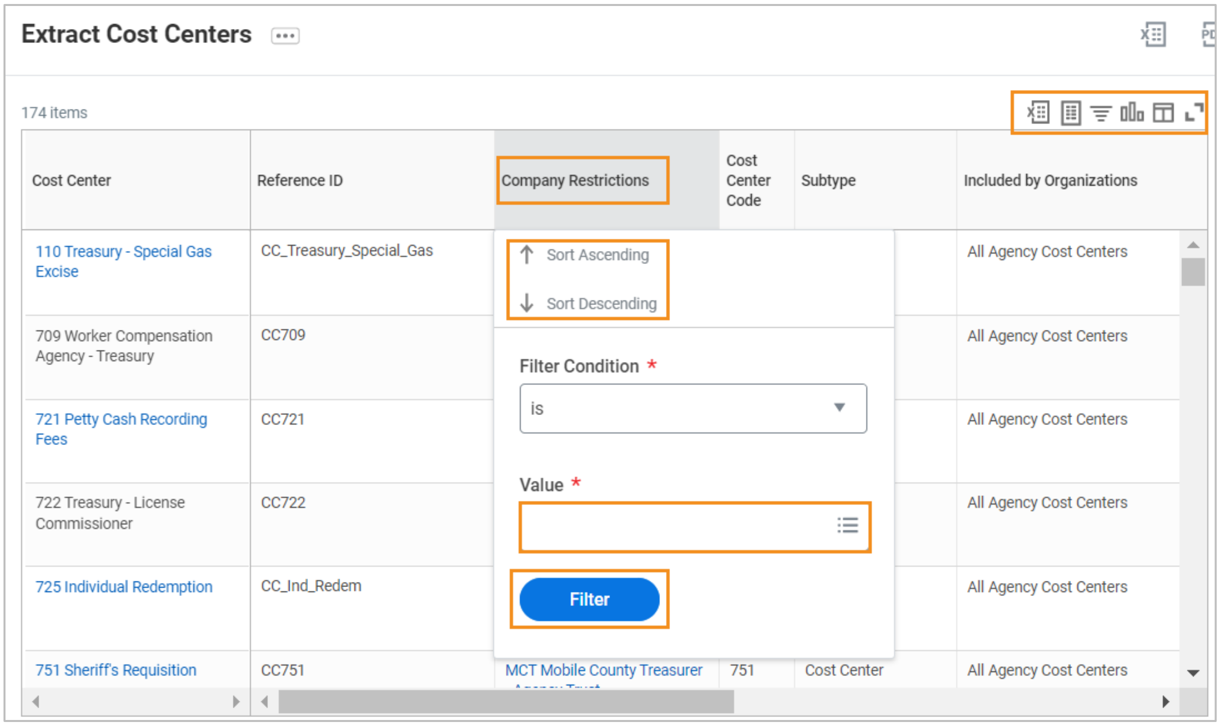


Sort, Filter, and Export Reporting Data

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.

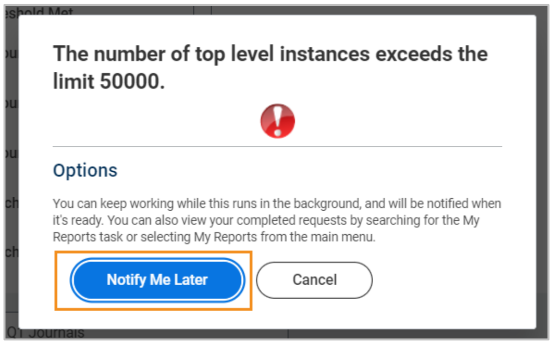


Name	Icon	Description
Sort		Click any column header to open the sort pop-up. • Select **Ascending** or **Descending**. • Once a sort is applied, click the column header again and select × Remove Sort to cancel sorting.
Expand/ Collapse		Click **Chart** icon to select a different type of chart. **Note:** 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.

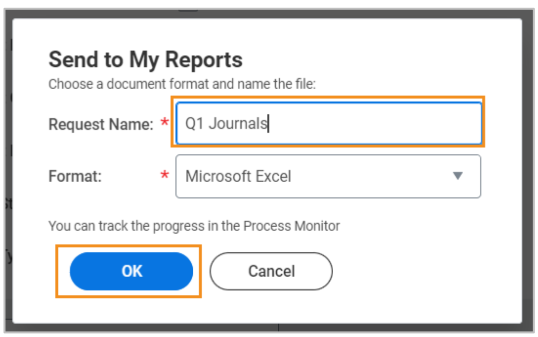
Use Notify Me Later, My Reports, and Process Monitor

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

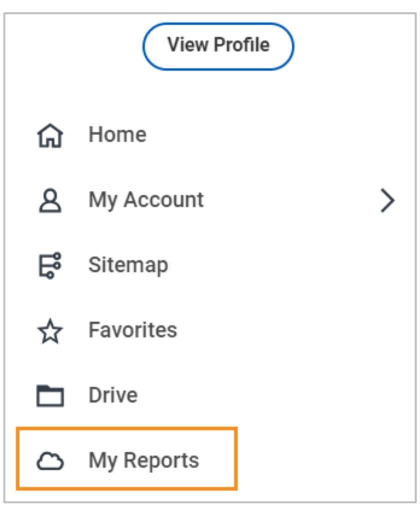
1. When the report data is not immediately returned, a pop-up box displays with an option to notify you once the report is generated. Click the **Notify Me Later** button.



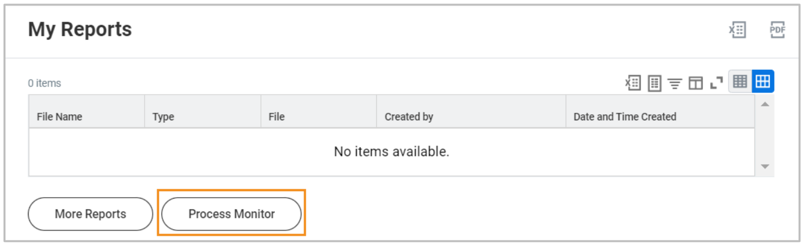
2. In the **Request Name** field, type a filename that will help you identify the report. If you do not edit this field, it will default to My Report.
   Click the **Format** dropdown to choose Excel or PDF. Click **OK**.



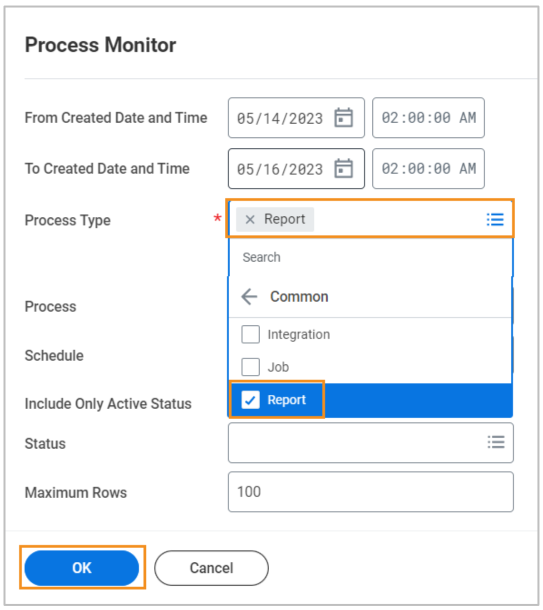
3. Click the profile icon → **My Reports**



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.