

## Overview

This job aid explains how to access, generate, and navigate reports. Reports provide employees on-demand access to view and edit their personal and career data. You can either search for a report by name in the Search field or use the Reports application.

**Note:** Your system security access will drive what reports you can see as well as the fields you can see in them. If you do not have access, and believe you should, please contact the IT Service Desk.

Workday reporting functionalities include:

- Point in time and period reporting view
- Graphs and summaries
- Ability to Export to Excel or PDF
- Prompts, filters, and sorting
- Visibility to data is based on your security role
- Audit trail of changes

## Access & Generate Reports

Access and generate reports from Workday Search.

**Note:** Workday has Predictive Search, but it does not spell check. Be sure you have not misspelled or added additional letters to the report name.

- In the Workday search bar, type the report name.  
**Note:** Report links contain the word 'Report' below the title.
- Click on the report name that you would like to generate.
- Reports display fields to set data prior to running. Click the empty field(s) and select the value(s) as applicable. Once you've set the filters and preferences click **OK** at the bottom of the screen.

Organizations \*

Include Subordinate Organizations

Include Managers

**Note:** If a report requires a large amount of data to be loaded, then a pop-up displays a message that you can keep working while the report runs in the background and will be notified when the report is ready. Click **Notify Me Later** to continue working in Workday. When ready, a pop-up notification and a Workday notification appear.

**Options**

You can keep working while this runs in the background, and will be notified when it's ready. You can also view your completed requests by searching for the My Reports task or selecting My Reports from the main menu.

## Report Navigation

- Below are some common report-related icons that may be relevant to your report. You will find these icons at the top right of your report. Please note that you may not see all of these icons in your report.

| Icon  | Description   |
|---|---|
|    | Download a PDF of report data.  |
|    | Export report data to Excel.  |
|    | Filter report data.   |
|   | Toggle charts on or off.  |
|  | Configure the chart format, e.g. pie, line, column, bar, area, or bubble. |
|  | View the report in full screen mode.                                      |

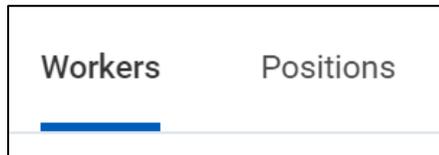
## Report Navigation

### Workday Job Aid for Employees

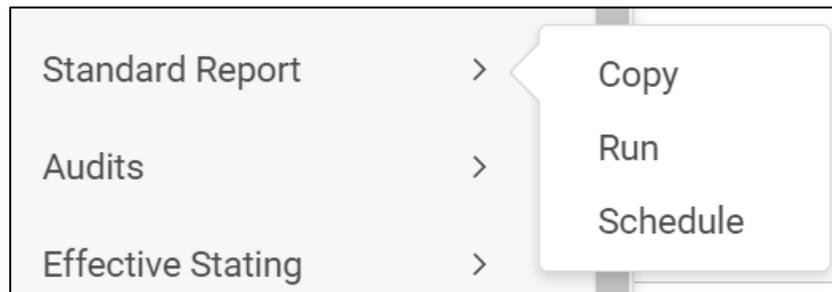
- Blue text in a report fields indicates a link that you can use to drill-down for additional information. To access more information, click the blue text or hover over the text to reveal the Related Actions icon.

| Employee ID | Employee   | Most Recent Hire Date | Position  |
|-------------|--|-----------------------|---|
| W4900       | <a href="#">Blake Reid</a>  | 07/14/2021            | <a href="#">P011741 Librarian II - Blake Reid</a>             |
| W4901       | <a href="#">Mason Chen</a>   | 07/14/2021            | <a href="#">P011742 Public Safety Dispatcher - Mason Chen</a> |

- Reports may provide tabs which display additional views. Below is an example of possible tabs; tabs will differ based on the report.

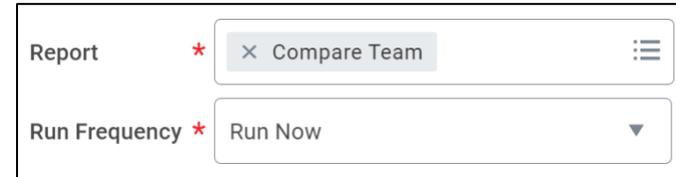


- Reports display the Actions icon to the right of the report title. Click **Actions** > **Standard Report** > Select **Run** or **Schedule**.



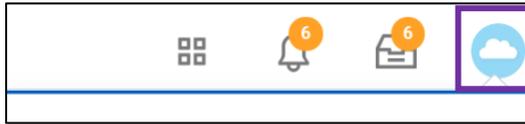
**Note:** The options will vary depending on the type of report you are running and your role at the College.

- To schedule a report, click **Schedule** and select a **Run Frequency**.

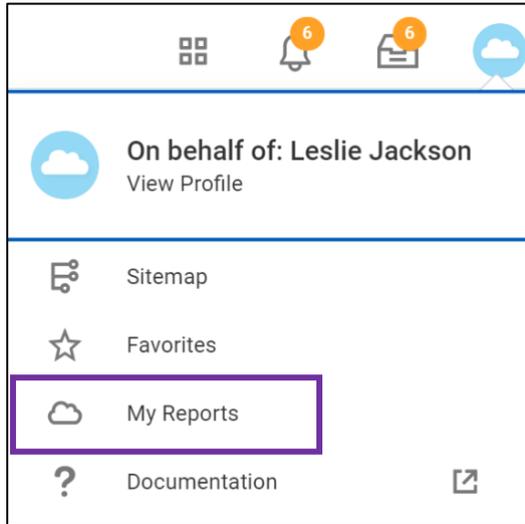


### Access a Scheduled Report

1. Click your **Photo/Cloud** icon on the top right of your screen.



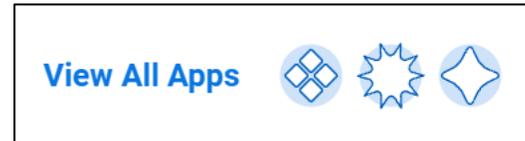
2. Click **My Reports**.



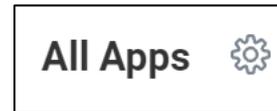
3. View a list of your reports and corresponding details.

### Add The Report Application to Your Home Page

1. From the Workday home page, click **View All Apps**.



2. Click the **gear icon** next to the All Apps header.



3. The Configure Worklets screen displays.
4. In the Optional Worklets section, click the **+ icon**.
5. In the Worklet field, search for and select **Reports**.  
**Note:** An orange alert may appear regarding Workday mobile. Ignore this error and continue with the steps below.
6. Click **OK**.
7. Click **Done**.

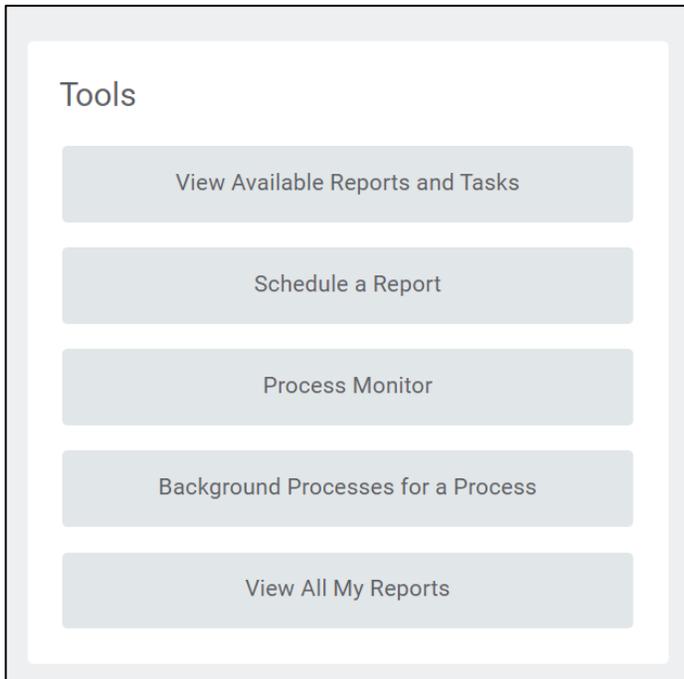
**Access the Reports Application**

1. From the Workday home page, click **View All Apps** and select the **Reports** application.

**Note:** If you do not see the Reports application, complete the *Add The Report Application to Your Home Page* section in this job aid.

2. The following options display. Refer to the table below for additional information.

**Note:** Information displayed in each tool is based on your role at the College.



| Tool                               | Description   |
|------------------------------------|---|
| View Available Reports and Tasks   | View reports, data validations, and tasks you can access.                           |
| Schedule a Report                  | Select a <b>Report</b> and <b>Run Frequency</b> to schedule a report.               |
| Process Monitor                    | Select a time period and <b>Process</b> to view the status of background processes. |
| Background Processes for a Process | Select a <b>Process</b> and time period to run background processes for a process.  |
| View All My Reports                | View all the reports you have created and/or run.                                   |