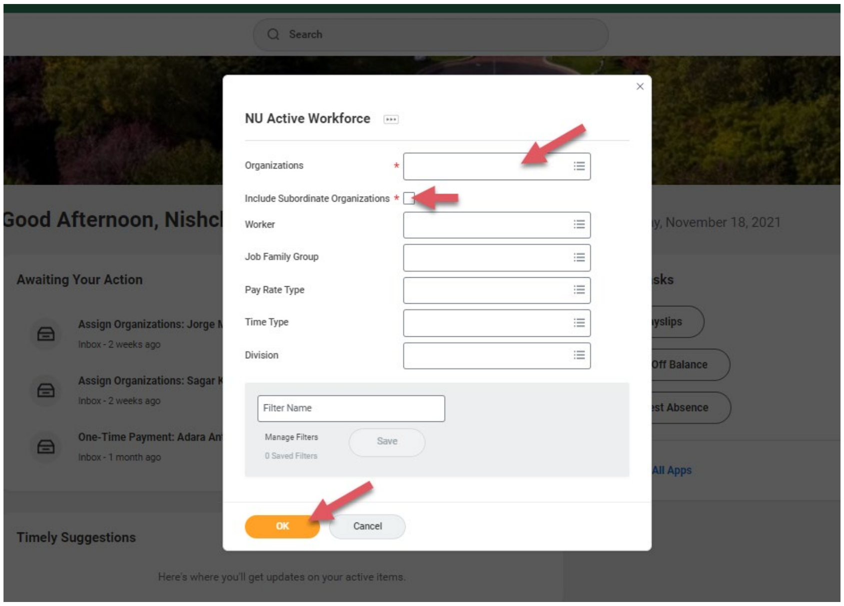
Knowledge Article: Running Workday Reports

I. How to locate and run a Workday report
II. How to schedule a Workday report

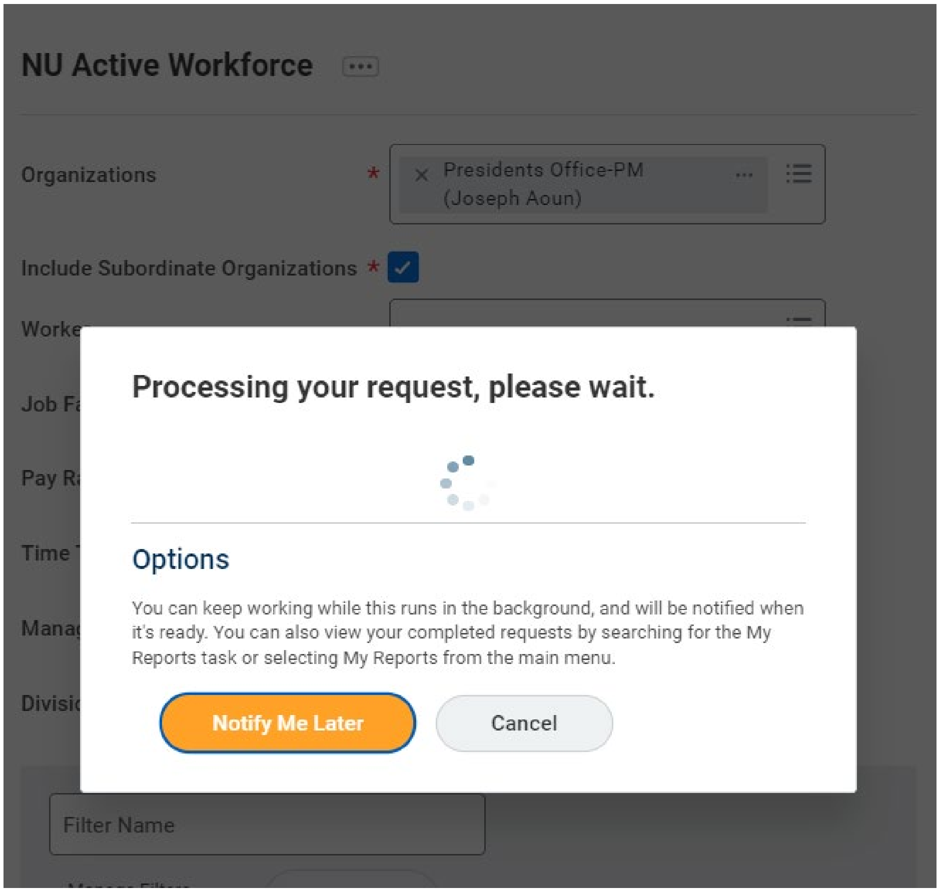
I. How to locate and run a Workday report

1. From the Workday Home page, enter the report name (or any search term) in the search field. The search field will start to pre-populate report options as you start typing.

2. Click on the report you are looking for from the search results.
3. Complete the field(s) in the window that appears next. Note: A red asterisk will appear next to required fields.
    a. The 'Organizations' field is required. The population of employees that appear on the report will come from the Organization(s) you select here.
    b. 'Include Suborganizations' box: Check this box if you would like to include the population of employees that are from all the sub-organizations reporting to the Organization selected above. If this box is not checked, you will only get the population of employees that directly report to the Organization above.
    c. You may also complete any of the other fields in this window in order to narrow down the population on your report.
    d. Click OK to proceed.

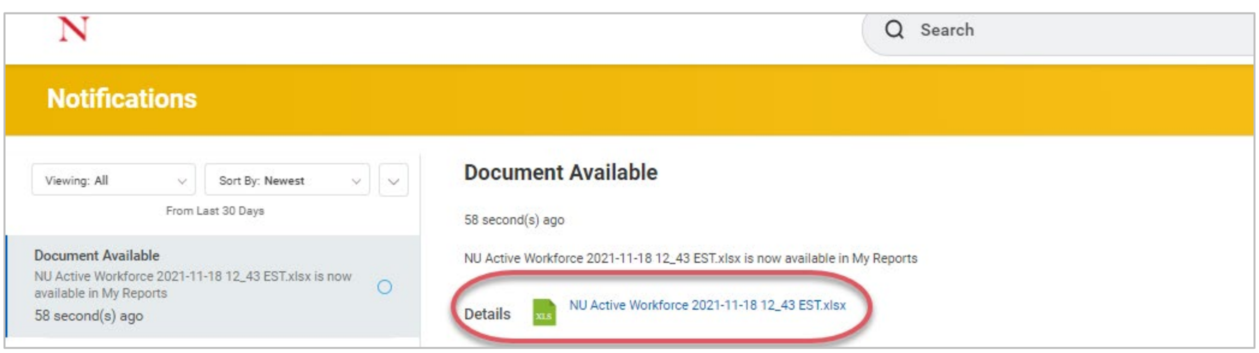


e. If the report takes long to run, you will get a notification that prompts you to either wait or have it delivered to you inbox
   The length of time it takes for the report to be generated will vary and is based on the size of the report and the amount of data being analyzed.

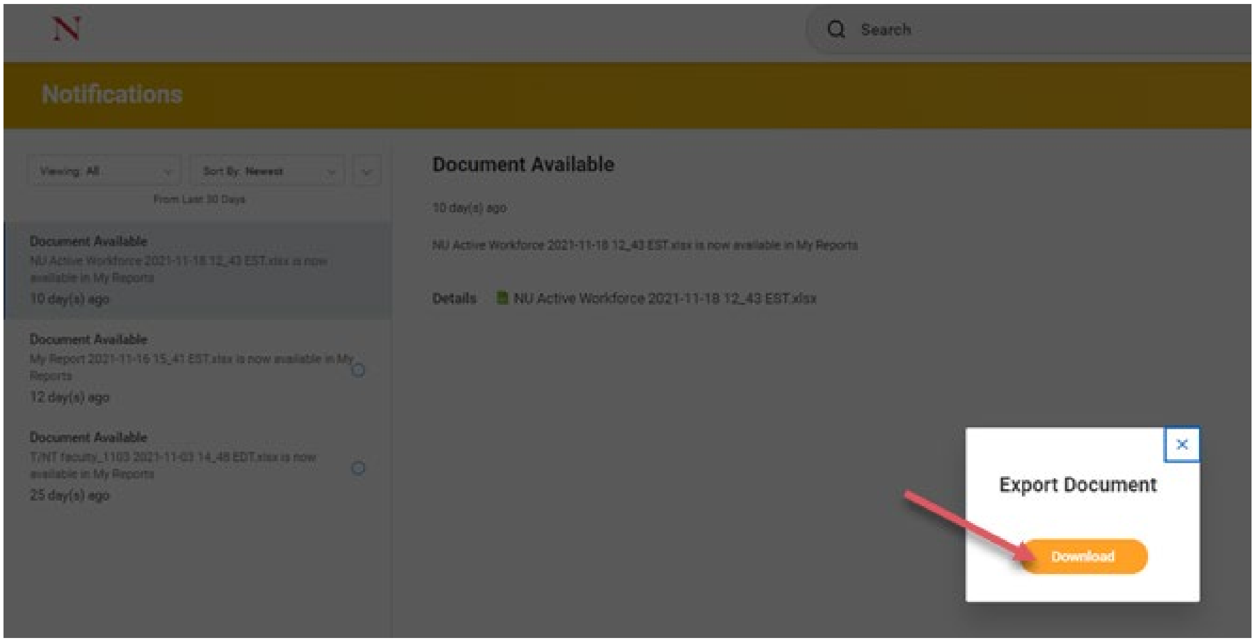


f. Choose Notify me later if you would like it delivered to your inbox.

4. Next, you will receive a Notification in your inbox which you can access using the icon in the top right corner of any page in Workday.
5. To open the report, click on the link that is in the Notification.



6. Click the Download button.

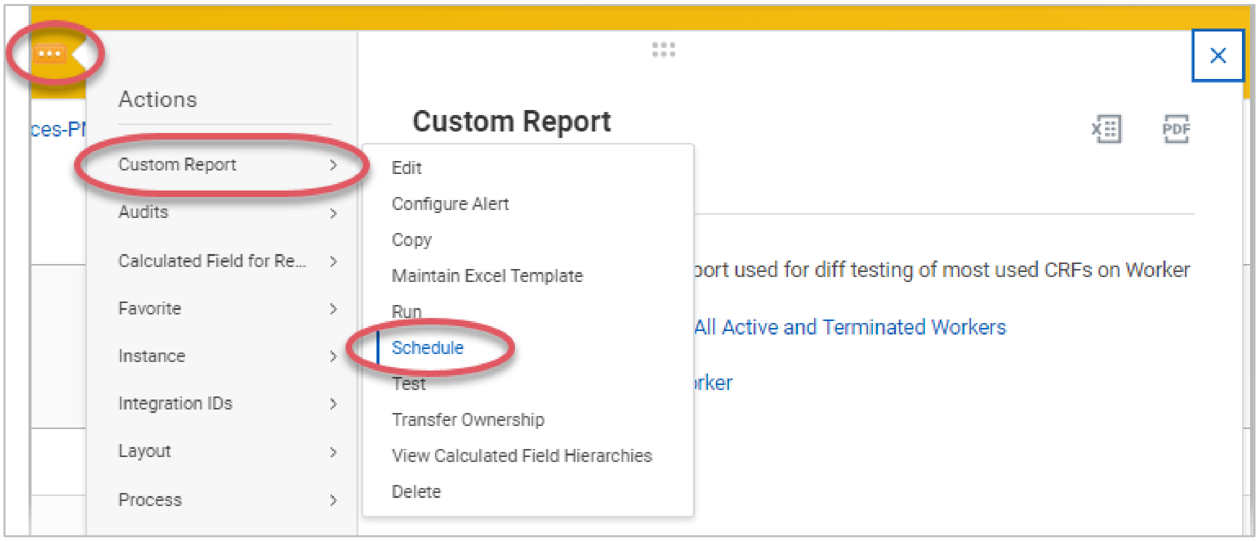


II. How to schedule a Workday report

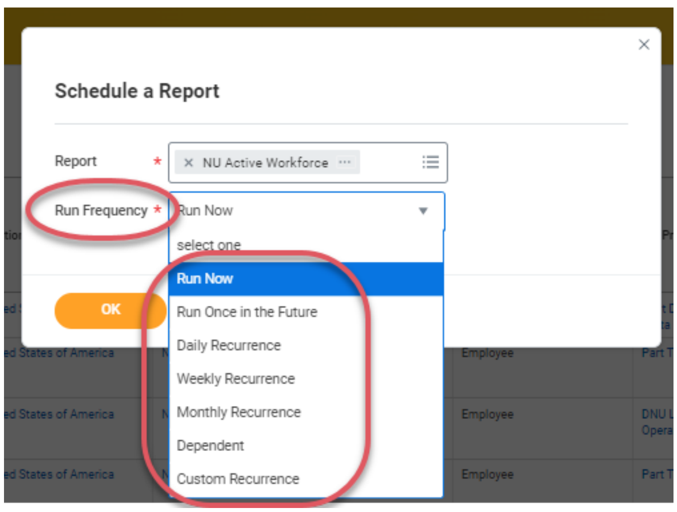
1. From the Workday Home page, enter the report name (or any search term) in the search field. The search field will start to pre-populate report options as you start typing.

2. Click on the report you are looking for from the search results.

4. Select Custom Report > Schedule.

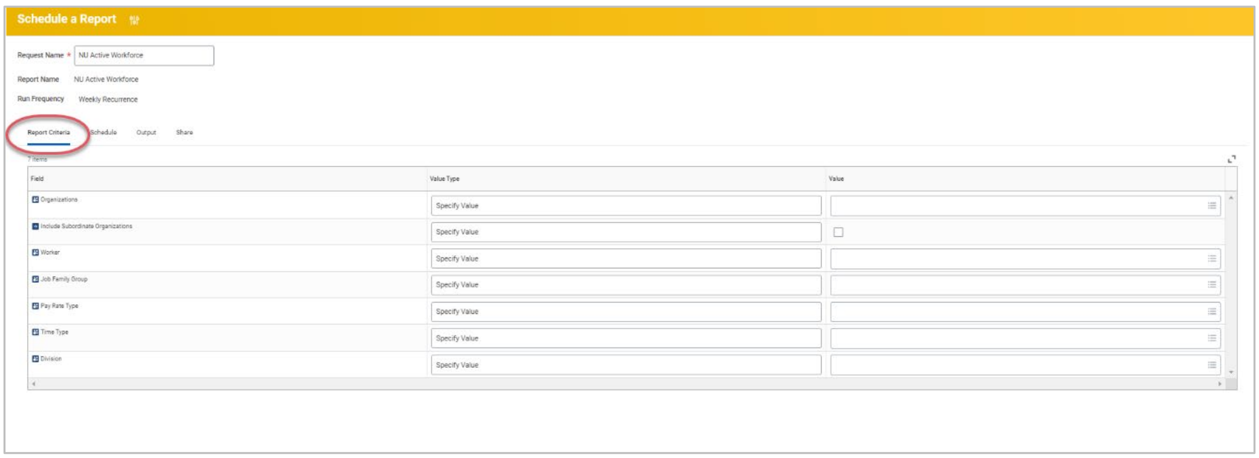


5. Select the Report name as well as the Frequency.

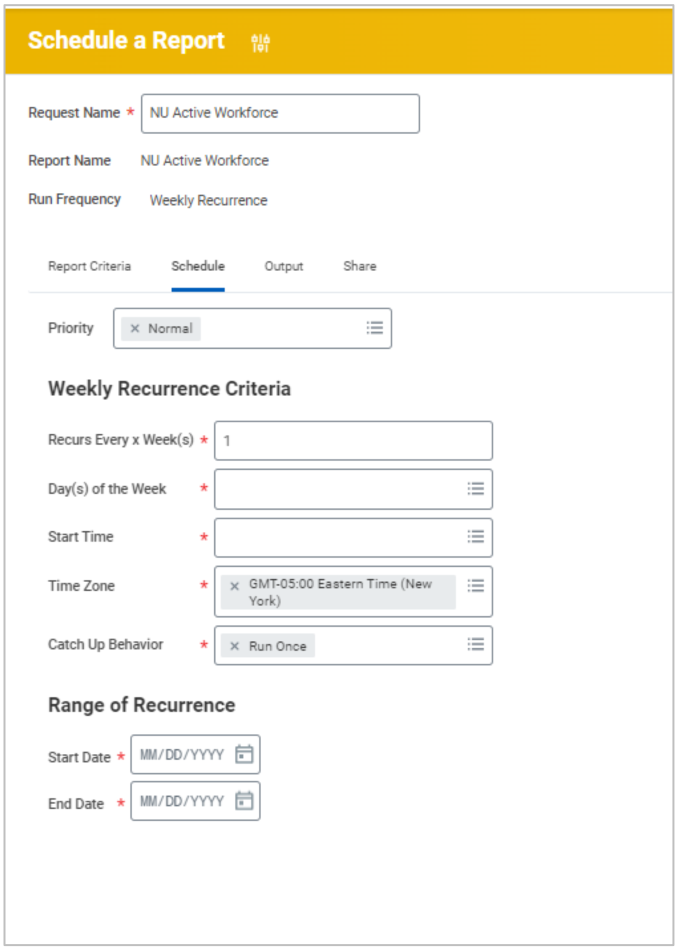


On the next page, there are 4 tabs.

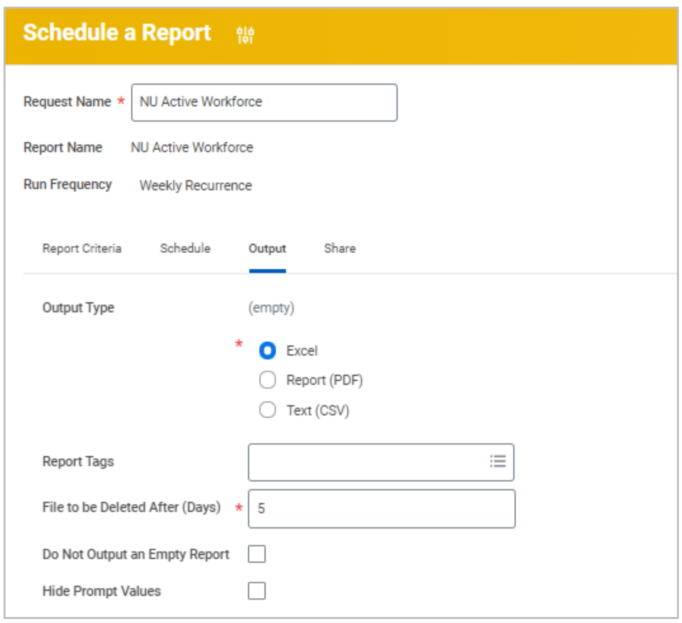
6. Report Criteria Tab:
    a. The ‘Organizations’ field is required. The population of employees that appear on the report will come from the Organization(s) you select here.
    b. ‘Include Suborganizations’ box: Check this box if you would like to include the population of employees that are from all the sub-organizations reporting to the Organization selected above. If this box is not checked, you will only get the population of employees that directly report to the Organization above.
    c. You may also complete any of the other fields in this window in order to narrow down the population on your report.



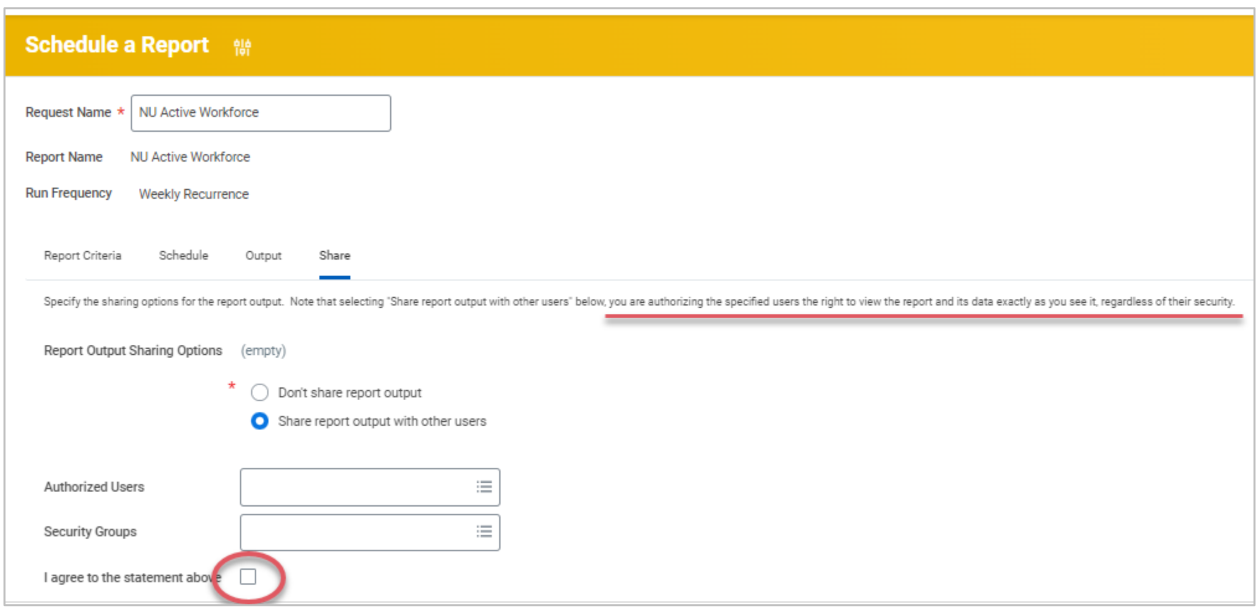
7. Schedule Tab:
    a. Select the Priority value.
    b. Weekly Recurrence Criteria fields dictate the date and time options.
    c. Range of Recurrence date fields allow you to set a date range in which this report will be running.



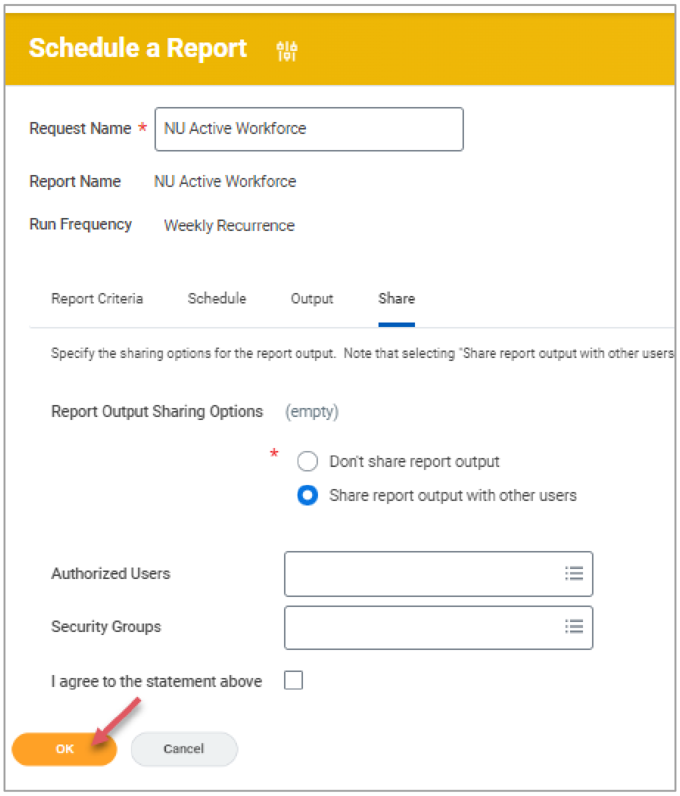
8. Output Tab:
    a. The options for Output Type default to Excel but you can change this to either a PDF or a CSV file.
    b. File to be Deleted After (Days) is defaulted to 5 days which means that if you don't pick up the report in Workday after 5 days, it will be deleted. Change the default to any number of days.
    c. Do Not Output an Empty Report: If this box is checked, it means that there will be NO report output if there are no records appearing on the report when it is run. If the box remains unchecked, the report output would contain only column headers and blank rows if there are no records.
    d. Hide Prompt Values: If this box is checked you will not see, as part of the output, a listing of the prompt fields and values that have been configured (see step 4, Report Criteria). If the box remains unchecked, the criteria fields and values will be a part of the output.



9. Share Tab: This tab provides an option to provide a copy of the report outputs to other Workday users. If you don't want to share the report, make sure the 'Don't share report output' radio button is selected.
    a. If you do decide to share the report outputs, please read the statement on this tab's screen carefully.
        i. The statement says **"…you are authorizing the specified users the right to view the report and its data exactly as you see it, regardless of their security."**
        ii. Since report outputs are run based on the Workday user security of the person who set up the schedule, and your Workday security allows you to view personal employee data such as salaries, your report outputs will include these fields. If you share this output with another Workday user who does NOT allow a view to these data fields as part of their Workday security, they WILL be able to see this data on the report that you scheduled.
    b. If you are sharing the report, indicate the Workday users with whom you will share the report output using the Authorized Users field and/or the Security Groups field.
        i. Select the box next to "I agree to the statement above".



10. Click OK


Schedule a Report
Request Name *
NU Active Workforce
Report Name
NU Active Workforce
Run Frequency
Weekly Recurrence
Report Criteria
Schedule
Output
Share
Specify the sharing options for the report output. Note that selecting "Share report output with other users
Report Output Sharing Options
(empty)
*
Don't share report output
Share report output with other users
Authorized Users
Security Groups
I agree to the statement above
OK
Cancel