

Workday Docs for Layouts

Product Summary

December 10, 2025

This content is not part of the Workday Administrator Guide and is subject to further change.



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Summary of User Guide Changes - Docs for Layouts

This table describes updates to the User Guide within the past year. We update the User Guide when new features impact the product user interface and when editorial changes improve content quality.

This page is intended to be a summary of content changes in the User Guide, and is not a full list of new features. If a new feature results in a change to only the Administrator Guide content, that change isn't described here.

Date	Notable Content Changes
October 2025	<p>Added information about changing the report data source for an existing document layout to these topics:</p> <ul style="list-style-type: none"> • Create and Publish Document Layouts in Docs for Layouts on page 4 • Concept: Managing Document Layouts in Docs for Layouts on page 11 • Concept: Viewing Document Layout Details in Docs for Layouts on page 12 <p>Added information about deleting language instances to this topic:</p> <ul style="list-style-type: none"> • Concept: Language Instances for Translated Document Layouts on page 13
August 2025	Concept: Inserting Dynamic Data in Document Layouts on page 7 : Added information about inserting subtotal values in data tables in document layouts.
March 2025	<p>Concept: Applying Condition Rules in Document Layouts on page 9: Added information about creating custom conditions for content in document layouts.</p> <p>Reference: Supported Data Sources in Docs for Layouts on page 15: Updated with additional data sources that Docs for Layouts supports.</p>
February 2025	Concept: Viewing Document Layout Details in Docs for Layouts on page 12 : Added a new topic that describes the Document Layout Details report for viewing document layout metadata and deactivating document layouts.
September 2024	Concept: Inserting Dynamic Data in Document Layouts on page 7 : Added information about updating document layouts when currency and numeric data field formats change.
March 2024	Workday 2024 R1 base version.

Concept: Docs for Layouts

Docs for Layouts is a visual editing tool for creating document layouts, which are specific designs for PDFs that use data from a Workday report.

When you create a document layout you can:

- Insert text, tables, images, headers, and footers.
- Manage document settings, add pages, and insert page numbers.
- Insert data fields.
- Apply condition rules.

Once you publish the document layout, you can then use it in a business form layout when you print your custom reports.

Note: Docs for Layouts is available for advanced custom reports for specific supported data sources. See *Reference: Supported Data Sources in Docs for Layouts* for more information.

Docs for Layouts is an alternative method for creating layouts to that of using Report Designer (BIRT). You can create and manage document layouts in addition to managing report design files, and then when you use a business form layout you can select either a document layout or a report design file as the source of data. In many cases, you might choose to use Docs for Layouts to create document layouts because of its ease of use. However, if your document has special requirements that Docs for Layouts doesn't currently support, you can continue to use a report design.

To use Docs for Layouts you need to:

- Use an advanced custom report that contains the data you want to include in a document layout.
- Ensure that the report has been enabled for Web Services.
- Be the owner of the report or have had the report shared with you.

To determine if Docs for Layouts is a good fit for your use case, review these considerations:

- Layouts created with Report Designer can't be automatically converted into the Docs for Layouts format. You must create new document layouts manually.
- Content can't be automatically reused between document layouts. If the same content is used in two document layouts, you need to update it in both.
- Only one font is available. The document layout editor, preview PDFs, and generated PDFs use the Roboto font.
- JavaScript can't be used. For layouts that need JavaScript you must use Report Designer.

Create and Publish Document Layouts in Docs for Layouts

Prerequisites

Security: These domains in the System functional area:

- *Docs for Layouts*
- *Custom Report Creation*

Make sure that the advanced report you want to use as the source of data for a document layout is enabled as a web service. Docs for Layouts only supports advanced reports.

Context

Docs for Layouts enables you to design, create, and preview document layouts for custom advanced reports in Workday. You can include content (such as text, tables, images, headers, and footers), add new pages, adjust page settings, and preview the layout as you build it. You can also insert data fields and apply condition rules. After you publish the document layout, you can select it in a business form layout for use when you print your documents.

Steps

1. Access the Create Document Layout task and type a name for the document layout.
2. Select a custom report to use as the source for data. The report defines the data fields and condition rules available in the document layout and the data included in the generated document. To change the report selected for the Source, click File > Change Data Source.

Note: Changes made in the report are reflected in the associated document layout. You can use the Edit Document Layout task to open the document layout, review data fields and condition rules, and make updates as necessary.

3. (Optional) Change the base language of the layout by clicking Language > Manage Languages, adding a new language, and selecting it as the base.

We recommend setting the base language before adding content. When you add a new language instance, Docs for Layouts copies the content from the base language to use as the starting point for the translated language instance.

4. Insert text, tables, and images and design the layout for your document.

The document layout is initially in an unpublished state and an Unpublished Changes indicator displays at the top. You must publish the layout first before you can select it for use when printing a document.

5. (Optional) Add language instances for the document layout by clicking Language > Manage Languages.

When you add a new language instance, Docs for Layouts copies the content present in the base language. Workday doesn't automatically translate text into a new language. Instead, you must manually replace it with text that has already been translated.

6. (Optional) Click Preview to upload an XML file and generate a PDF preview to see how the document layout looks with actual data.

7. Click Publish to make the current content active and display the Published indicator at the top. After you publish the document layout, it becomes available for selection when printing documents. If you have added multiple language instances, you must publish each language separately.

8. Make additional edits as needed. As soon as you make a change, the Unpublished Changes indicator displays at the top. Changes aren't applied and used in associated print actions until you click Publish again.

Next Steps

If your workflow uses a business form layout when you print documents:

- Access the Create Business Form Layout task (or the Edit Business Form Layout task).
- Select the Active check box.
- Select the Document Layout option and choose the appropriate document layout.

Edit Document Layouts in Docs for Layouts

Concept: Managing Document Settings in Document Layouts

You can define various settings for the document layout. Click the Document Settings icon on the left side of the editor to open the right panel. You can edit the:

- Page size
- Page units
- Page orientation
- Page margins

You can also insert headers and footers and adjust their height and margins.

Concept: Managing Headers and Footers in Document Layouts

Inserting Headers and Footers

You can create a header or footer that contains text, tables, images, and page numbers. Header and footer settings apply to all pages in the document; you can't control individual header and footer values per page.

You can insert several headers and footers and then use condition rules to control which one displays in the printed document. When you print the document, the first header and footer with a true condition rule (or with no condition rule) displays.

To insert a header or footer:

1. Click the Headers or Footers icon on the left side of the editor and then click Insert Header or Insert Footer.
2. Insert a text, image, table, or horizontal line element.
3. Use the Format tab in the right panel to format the element.

The formatting options depend on the type of element selected:

- Text: Spacing, background, border style, border color.
- Table: Spacing, border, border color, border style, cell background.
- Image: Spacing, image size, alignment.
- Horizontal line: Spacing, line color, line style.

If you insert several headers or footers, you can change the order they display. To move a header or footer up or down, click an arrow to the left of the header or footer, or select Move Up or Move Down from the related actions menu in the right panel.

To delete a header or footer, first click any area outside of the header or footer. Then select Delete Header or Delete Footer from the related actions menu in the right panel.

Inserting Page Numbers

You can add the page number and the total number of pages to a header or footer by inserting automatic page numbering fields into a text or table element.

To insert page numbers:

1. Select the text or table element in the header or footer where you want to insert the page number.
2. Click the Page Numbers icon in the toolbar.
3. Select Current Page and/or select Total Pages.

Concept: Managing Pages in Document Layouts

Inserting Pages

You can continue to add content on a single page in a document layout because the page area automatically extends. When you print the document, page breaks are automatically created.

To ensure content displays on a specific page, you can insert manual page breaks by adding new pages at the end of the document layout. You can't insert new pages in between other pages of the document layout, or insert section breaks to apply different formatting on pages in each section.

To manually add a new page, click Add New Page at the end of the document layout below the existing content.

To delete a page, click the page to delete. From the Format tab in the right panel, click Delete.

Inserting Background Images

You can add a background image to a single page or multiple pages of the document layout. A background image only displays once, even when the page area automatically extends as you add content. To have a background image display on multiple pages, you must manually add a new page and then add the background image to each page separately.

To insert a background image on a page:

1. Select Insert > Background Image.
2. If the layout has more than one page, select the page where you want to insert the background image.
3. Click Select Image.
4. Select the image and click Save.

To delete a background image, select Insert > Background Image and click Delete Background Image.

When you add a background image to a document layout, the image scales to fit the width of the page, excluding the page margins, so images that are taller or shorter than the page may not display as expected. We recommend using a background image that matches the ratio of the page size specified in the document settings.

Concept: Inserting Text, Tables, and Images in Document Layouts

You can insert text, table, image, and horizontal line elements on a page in a document layout. Place each element above, below, or to the right or left of an existing element. Different types of elements can be placed next to each other both vertically and horizontally.

To insert an element:

1. Click the Insert Text, Insert Table, Insert Image, or Insert Horizontal Line icon on the left side of the editor.
 - When inserting an image element, navigate to and select an image.
 - When inserting a table element, click to select the number of columns and rows for the table.
2. Move the cursor over the top, bottom, or side edge of an existing element. A blue indicator displays to show the locations where you can insert the element.
3. Click to insert the element.

Additional Actions:

Format an element	Select the element and use the Format tab in the right panel. The formatting options depend on the type of element selected: <ul style="list-style-type: none"> • Text: Spacing, background, border style, border color. • Table: Spacing, border, border color, border style, cell background. • Image: Spacing, image size, alignment. • Horizontal line: Spacing, line color, line style.
Delete an element	Select the element, and from the Format tab in the right panel, click the Delete icon.
Move an element	Select the element, and from the Format tab in the right panel, click the Move icon. Move the cursor to the new location and click to place the element.

Additional Notes:

- The maximum size for each image is 1 MB

Concept: Inserting Dynamic Data in Document Layouts

Inserting Data Fields

When you create a document layout, the custom report you choose as the source defines the data fields and condition rules available in the layout, as well as the data included in the generated document. If

changes are made to the data fields in the report, you can use the Edit Document Layout task to open the document layout, review the data fields and condition rules, and make updates as necessary.

You can insert a data field in the text area of a text or table element. Data fields display in the Dynamic Data panel with a + sign. You can select the Filter icon in the panel to show data field descriptions and types.

Any time a format for a currency or numeric data field is added, removed, or changed in a report, the data fields are updated in the Dynamic Data panel in the document layout, but you must remove the data field instances from the document layout itself, and re-add them, in order for printed documents to accurately display the values.

To insert a data field:

1. Click in the text area of a text or table element.
2. From the Dynamic Data tab in the right panel, click the + sign next to the data field that you want to insert. The data field displays in the element as text with a dotted underline and green background.

To delete a data field, select it and press the Delete key.

To replace all instances of a data field with a different one:

1. Locate the data field in the Dynamic Data tab in the right panel.
2. From the related actions menu next to the data field in the panel, click Replace All.
3. Locate the new data field you want to insert and click the Replace Data icon.

When you add dynamic data to a table, you must place multi-instance data from different business objects in different rows of the table to ensure that the repeating data rows align correctly when the document is generated. If the + sign next to a data field in the Dynamic Data panel is grayed out, then the data field can't be placed in that same table row. You can select the related actions menu next to the data field and then click View Data Details for information about the related business object.

Inserting Dynamic Check Boxes

You can insert a check box in the text area of a text or table element and associate it with a boolean (true/false) data field. When you print the document layout, the check box will display as checked (true) or unchecked (false) depending on the data field it is associated with.

To insert a check box:

1. Click in the text area of a text or table element.
2. Click the Check Box icon in the toolbar.
3. Select the data field for the check box from the list of available boolean data fields and click Insert.
4. Type a label for the check box by adding text next to it in the text element.

The check box displays in the layout as checked with a green background. To see the name of the data field associated with the check box, select the check box and view the Format tab on the right.

To delete a check box, click it and then press the Delete key.

Inserting Dynamic Images

You can insert a placeholder for an image that is associated with a data field, such as an employee photo. Image placeholders display in the Dynamic Data panel along with other data fields and are identified by an icon with a square and + sign. While data fields must be placed in the text area of a text or table element, image placeholders are contained within their own element and can be placed anywhere on the page.

To insert a dynamic image:

1. Locate the dynamic image in the Dynamic Data tab in the right panel.
2. Click the Image Placeholder icon (a square with + sign) next to the dynamic image that you want to insert.

3. Move the cursor over the top, bottom, or side edge of an existing element. A blue indicator displays to show the locations where you can insert the image placeholder.
4. Click to insert the image placeholder. The image placeholder displays as an empty rectangle with a green background.

To delete an image placeholder, select it and click Delete from the Format tab in the right panel.

To move an image placeholder, select it and click Move from the Format tab in the right panel. Move the cursor to the new location and click to place the image placeholder.

Inserting Subtotal Values

You can group and subtotal data in a table that includes repeating data rows and numeric or currency data fields. When you create the table row, insert the repeating data field to group by in the first column and insert a numeric or currency data field to subtotal by in the last column. Then select the table row you want to subtotal and click the Subtotal Repeating Row toggle in the Format tab on the right panel.

A repeating data row in a table that is enabled for subtotals displays a subtotal indicator to the left of the row. When you print the document layout, a new row with a subtotal value in the last column displays below the group of data rows in the table.

Workday doesn't support:

- Subtotaling non-numeric data fields.
- Subtotaling only some of the rows in a table.
- Subtotaling data fields of different currency types.
- Grand totaling of all numeric or currency data fields in a table.
- Grouping rows of data in a table without subtotaling them.
- Grouping rows of data in a table by more than one data field.
- Modifying the order of the table rows within a group of subtotaled rows.

If you enable a table row for subtotals and then modify or remove the data fields in that row, you might need to enable it for subtotals again.

Concept: Applying Condition Rules in Document Layouts

You can use condition rules to control the visibility of content in a document layout. When you create a document layout, the custom report you choose as the source defines the data fields and condition rules available in the layout, as well as the data included in the generated document. If changes are made to the data fields in the report, you can use the Edit Document Layout task to open the document layout, review the data fields and condition rules, and make updates as necessary.

If the report that is associated with the document layout has boolean (true/false) data fields on the primary business object, those fields are automatically available for you to use as condition rules on the Conditions tab in the right panel, and you can apply them in the layout to show and hide content. If the condition is true when the document is generated, the conditionalized content displays, and if the condition is false or can't be evaluated, the content is hidden. Data fields on a related business object in the source report can't be used as conditions.

Custom Condition Rules

In addition to having condition rules that use boolean data fields, you can create custom condition rules that use other data fields available from the source report. From the Conditions tab in the right panel, click the Create a Condition button and select a Data Field from the list of available data fields. You can create a custom condition rule using numeric, text, self-referencing, and single instance data fields for primary, self-referencing, and single instance business objects. Custom conditions display on the Conditions tab along with the boolean data type conditions. However, custom conditions can be edited and deleted, while boolean conditions can't.

Using Condition Rules

To apply a condition rule to content, select the text or element in the document layout. Then, from the Conditions tab, click the + icon next to the condition that you want to apply. The colored eye indicator that displays next to the condition rule matches the background color of the text or element on the page where you applied it. Click the eye indicator to show or hide the associated content on the page. You can apply a condition to an entire row or column in a table, but not to individual cells.

To remove a condition rule, select the related actions menu next to the condition on the Conditions tab and then click Remove Instance. This removes the condition applied to the selected content but doesn't remove the condition from any other area in the layout that it is applied to. To remove a custom condition from all content, you can delete it from the Conditions tab.

If you edit or delete a custom condition from a document layout that has multiple language instances, you must open and republish each of the language instances separately to apply the updates.

Preview a Document Layout with Report Data in Docs for Layouts

Prerequisites

Security: These domains in the System functional area:

- *Docs for Layouts*
- *Custom Report Creation*

For any report containing data that you want to use as preview data in a document layout, make sure:

- The report is a custom report of the *Advanced* report type.
- The report is enabled for Web Services. (On the Advanced tab of the report definition, select the Enable As Web Service option.)
- You are either the report owner or the report owner shared the report with you.

Context

You can generate a PDF preview to see how a document layout looks with actual data. You run the custom report, save the data as an XML file on your local drive, and then upload the XML file to generate the preview document. When generating the XML file to upload for the preview, include only a single row of data, or the previewed document will contain data from all rows. Preview supports static images that you upload but doesn't support dynamic image placeholders.

Steps

1. From the document layout, open the Source report that you want to use as preview data.
2. Select Custom Report > Run from the related actions menu on the report.
3. Select any appropriate prompts and click OK.
4. From the report, select Web Service > View URLs from the related actions menu.
5. Select any appropriate prompts and click OK.
6. In the Workday XML section select REST Workday XML. The XML source code displays in a new browser tab.

Note: If Workday prompts you for credentials, enter the same username and password that you use to log in.

7. Right-click in the area containing the XML and then Save as... to save the data as an XML file.

Note: The Workday XML content that you save contains data returned by the report. Consider security and privacy policies when deciding where to store the XML file and who should have access to it.

8. From the document layout, click Preview.

9. Click Upload, navigate to the XML file you saved, and click Open. Alternatively, you can select XML files that were previously uploaded.

A popup displays while the preview generates. When the preview is ready, it displays in a new browser tab. You might need to disable your browser pop-up blocker if it prevents the preview from displaying.

Concept: Managing Document Layouts in Docs for Layouts

This table summarizes some of the actions that you can take when managing document layouts.

Action	Notes
Create a document layout	<p>Access the Create Document Layout task and select a custom report to use as the source of data. Insert text, tables, and images and click Publish to make the content active.</p> <p>The source report defines the data fields and condition rules available in the document layout, and the data included in the generated document. Docs for Layouts only supports advanced reports.</p>
Edit a document layout	<p>Access the Edit Document Layout task, select the layout, and make edits as needed.</p> <p>Changes aren't applied to the layout or used in associated print actions until you click Publish again.</p>
Change the report data source for the document layout	<p>To change the report selected for the Source, click File > Change Data Source.</p> <p>You must remove a document layout from any Business Form Layouts that it is associated with before you can change the report data source.</p> <p>When you change the report, data fields used in the document layout that don't exist in the new report display error messages and can be removed or replaced.</p>
Copy a document layout	<p>Access the Copy Document Layout task and select the layout to copy.</p> <p>The new layout will use the same custom report as the original layout. All language instances are copied as well.</p>
Delete a document layout	<p>You can't delete a document layout once you've created it, but you can deactivate it.</p>
Deactivate the document layout	<p>To deactivate the document layout, click File > Deactivate Layout.</p> <p>You must remove a document layout from any Business Form Layouts that it is associated with before you can deactivate it.</p>

Action	Notes
	Deactivated document layouts don't display in Business Form Layout selection lists and can't be selected. You can edit deactivated document layouts, but you can't publish them. To reactivate a document layout, click Activate Layout.
Migrate a document layout	You can migrate a document layout between tenants using Object Transporter (OX) and the Implementation Type of <i>Document Layouts</i> .
Make a document layout available for report printing	Access the Create Business Form Layout task and from the Source field, select a Docs for Layouts document layout. Select the same custom report for both the document layout and the business form layout.
Manage document layouts in different languages	To add a language instance, select Language > Manage Languages and search for the language you want to add. Then customize the instance by manually replacing the original content with text translated in the new language.
Download document layout support files	Click File > About > Download Files for Support to download a document layout to assist with troubleshooting issues. Downloaded support files should not be used to back up data.

Concept: Viewing Document Layout Details in Docs for Layouts

The Document Layout Details report is secured to the *Docs for Layouts* domain. You can use this report to view document layout metadata, change the report data source for a document layout, and deactivate a document layout.

This table summarizes the information in the report:

Field	Description
Document Layout	(Magnifying glass icon) A link to the document layout.
Name	The name of the document layout.
Active	The status of the document layout. A document layout can have a status of Active or Inactive.
Created By	The person who created the document layout.
Created Date and Time	The date and time the document layout was created.
Last Updated By	The last person who updated the document layout.
Last Updated Date and Time	The last date and time the document layout was updated.
Custom Report	A link to the report associated with the document layout.
Base Language	The default or preferred language of the document layout.
Published	The status of the document layout. A document layout can have a status of Published or Unpublished.
Images	Links to the images in the document layout.

Field	Description
Business Form Layout	Links to any Business Form Layouts associated with the document layout.

Changing the Source Report and Deactivating a Document Layout

You must remove a document layout from any Business Form Layouts that it is associated with before you can change the report data source or deactivate it.

Action	Description
Change Report	<p>Click Change Report to change the report data source for the document layout.</p> <p>When you change the report, data fields used in the document layout that don't exist in the new report display error messages and can be removed or replaced.</p>
Deactivate Layout	<p>Click Deactivate Layout to deactivate the document layout.</p> <p>Deactivated document layouts don't display in Business Form Layout selection lists and can't be selected. You can edit deactivated document layouts, but you can't publish them. To reactivate a document layout, click Activate Layout.</p>

Concept: Language Instances for Translated Document Layouts

You can design and customize content for multiple languages in a single Docs for Layouts document layout. You can select the languages that are available to add to the layout from the Languages section on the *Edit Tenant Setup – Global* task. Docs for Layouts doesn't support right-to-left (RTL) language formatting.

When you create a document layout, Docs for Layouts assigns a base language of English. To add a language instance, select Language > Manage Languages and search for the languages you want to add. When you add a new language instance, Docs for Layouts automatically copies the content that is present in the base language at the time you add the instance.

Workday does not automatically translate text into a new language. Instead, you customize each language instance by manually replacing the original content with text that has already been translated. If you want styling, layouts, data fields, or condition rules to apply across all language instances, you need to set them up in the base language before creating the language instances. Deleting a language from the Language > Manage Languages modal permanently removes all the content in that language instance from the document layout.

When you publish a document layout, you must publish each language instance separately as well. Data field and condition rule formatting in generated documents are based on the recipient user's location and not the language instance of the layout. If you don't add an instance for a document recipient's language in the document layout, the document will be generated using the base language.

Concept: Workflow for Printing a Custom Report Using Docs for Layouts

This topic shows you how you can create a document layout and use it in a basic workflow for printing a report.

1. Access the Create Document Layout task.
 - a. Select the custom report to use as the source report for the data available in the document layout.
 - b. Insert text, tables, images, headers, footers, and data fields.
 - c. Apply condition rules to define when content displays.
2. Click Publish to make the content in the layout active. After you publish the layout, it becomes available for selection when printing documents.
3. Access the Create Business Form Layout task to associate the document layout with the custom report.
 - a. Select the Active check box.
 - b. Select the Document Layout option and choose the appropriate document layout as the Source. When you select this option, the Apply Report Design separately to each row option is automatically selected.
 - c. Select the same report in the Custom Report field that you used in the document layout.
4. (Optional) From the related actions menu, select Layout > Manage Layouts and select the layout that you created as the default layout for the report.
5. From the related actions menu, select Custom Report > Run to run the report.
6. Select any necessary report prompts.
7. (This step is skipped if you have only one business form layout for the report.) In the Please Choose a Layout to Print dialog, select the business form layout that you created. Click OK to print the report.
8. View the resulting PDF.

Concept: Workflow for Printing Compensation Review Statements Using Docs for Layouts

This topic shows how you can use Docs for Layouts to create a document layout and incorporate it into the workflow for generating Compensation Review Statements.

1. Copy the standard Print Compensation Review Statement report to a custom report (or create a new advanced report using the data source Compensation Review Employee Adjustment for Statements).
 - Access the Copy Standard Report to Custom Report task.
 - Select the Print Compensation Review Statement report from the Standard Report Name prompt and rename the report.
 - On the Share tab, click the appropriate share option, and save the report.
2. Access the Create Document Layout task to create and publish a document layout.
 - Select the custom report to use as the source for the data available in the document layout.
 - Insert text, tables, images, headers, footers, and data fields.
 - Apply condition rules to define when content displays. Example: You can apply a condition to a section of text to display a bonus award only when the total bonus amount does not equal zero.
 - Click Publish to make the content in the layout active. After you publish the layout, it becomes available for selection when printing documents.

3. Preview the document layout to see how it looks with actual data.

Note: When generating the XML file to upload for the preview, include data for only a single employee. To review multiple statements, use the Release Compensation Review Statement task in a sandbox or an implementation tenant.

- From the document layout, open the report in the Source field and select Custom Report > Run from the related actions menu of the report.
 - Select any appropriate prompts and click OK.
 - From the report, select Web Service > View URLs from the related actions menu.
 - Select any appropriate prompts and click OK.
 - In the Workday XML section select REST Workday XML. The XML source code displays in a new browser tab.
 - Right-click in the area containing the XML and then click Save as... to save the data as an XML file.
 - From the document layout, click Preview.
 - Click Upload, navigate to the XML file you saved, and click Open. The preview displays in a new browser tab.
4. Access the Create Business Form Layout task to associate the document layout with the custom report.
 - Select the Active check box.
 - Select the Document Layout option and choose the appropriate document layout as the Source.
 - Select the same report in the Custom Report field that you used in the document layout.
 5. Access the Create Compensation Review Statement Rule task and from the Layout field, select the business form layout that includes the document layout .
 6. Access the Release Compensation Review Statement task and from the Compensation Review Statement Rule field, select the rule with the business form layout.

Reference: Supported Data Sources in Docs for Layouts

Docs for Layouts is available for advanced custom reports that use the following supported data sources:

- Compensation Review
 - Compensation Review Employee Adjustment for Statements
- Supplier Remittance
 - Payments for Remittance
- Employee Reviews
 - Employee Review Printout
- Talent Cards
 - Talent Review Documents for Talent Card for Review Printing Run
 - Workers for Talent Card for Worker Printing Run
- Invoices
 - Customer Invoices for Print Run
 - Customer Invoices for Print Run as of Approval Date
 - Customer Invoice Printing Run Group
 - Customers for Customer Statement Printing Run
 - Dunning Letter Printing Run
 - Dunning Letter Printing Run Group

- Learning
 - Learning Enrollments
 - Learning Record