



REPORT WRITER

For Workday Demo Call us +91-40-65555757

COURSE MANUAL AND ACTIVITY GUIDE

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REPORT WRITER FOR WORKDAY

DESCRIPTION

In this course you will learn the concepts of reporting in Workday, from how the data can be accessed to the configuration features of the Report Writer tool. You will gain insight into leveraging delivered reports, copying reports, and creating different report types. You will learn how to create simple and advanced report types, how to use sorts and how to utilize filters and prompts to control which instances of data will be returned as output. You will also learn how to share your reports with others, how to locate, manage and schedule your custom reports, as well as an introduction to working with analytic Matrix reports.

GOALS & OBJECTIVES

- Understand the structure of reports
- Understand how reports are created using the Report Writer
- Understand Report Data Sources (RDS) and everything that they drive

AGENDA

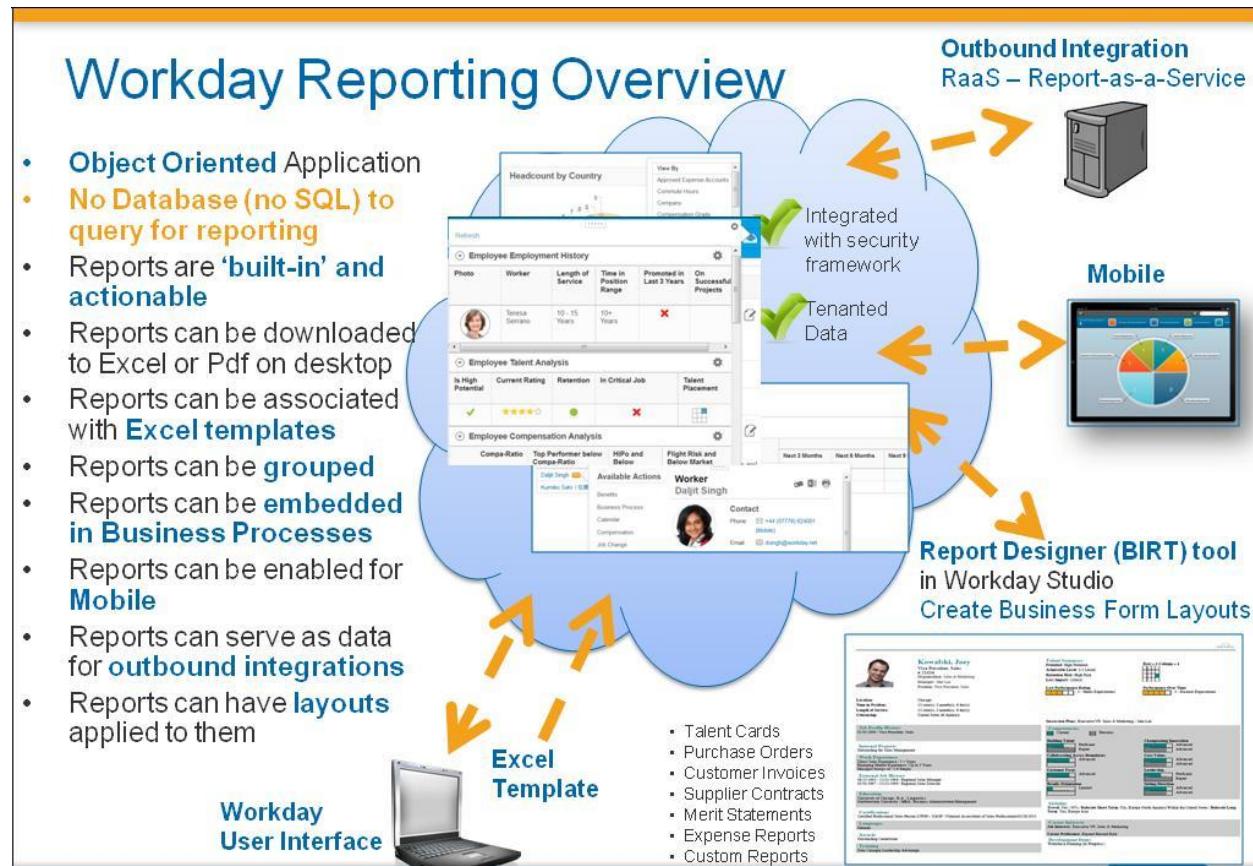
- Delivered Reports & Navigation
 - Running Standard Reports
- Terminology & Concepts
 - Business Objects, Data Sources, Report Fields
- Creating Custom Reports (Report Type: Simple)
 - Field types
- Editing Custom Reports
 - Sorts & Filters
- Advanced Report type
 - Prompts & Advanced Filtering
 - Fields from RBOs
 - Subsorts & SubFiltering
- Contextual Reporting
- Totaling, Outlining & Grouping Report Data
- Report Security - Sharing
- Locating reports
- Scheduling Reports
- Report Management & Other Configuration Features
- Matrix reporting

OVERVIEW AND INTRODUCTION

Workday is an object-oriented application which is different than traditional ERPs that typically use relational database management systems. In Workday, all data is captured in objects and objects hold relationships with each other. There are no tables, no joins, and there is no database to query for reporting with SQL. Reporting in Workday involves selecting a Primary Business Object to report on and the Report Data Source (or view into that PBO) that you need. From there, you can then access data from Related Business Objects and configure your reports with needed sorts, filters and conditions to meet your needs. We will introduce you to this object model with resources and examples to demonstrate the concepts.

Reports in Workday are designed for the functional user, easy to deploy, with a simple-to-use, consumer-friendly interface. Reports are built-in to the application allowing users to take action on the report output directly from the user interface. By being built-in, and not bolt-on, reports in Workday also leverage your security configuration, allowing you to access real-time, relevant data where you need it, how you need it.

Reports can also be used in integrations, can be accessed from mobile devices, can be embedded in your business process transactions to provide relevant data for decision-making at the time of decision, and can be further formatted into business forms and pixel perfect layouts using the Report Designer tool in Workday Studio.



WHERE TO BEGIN - PLANNING & APPROACH

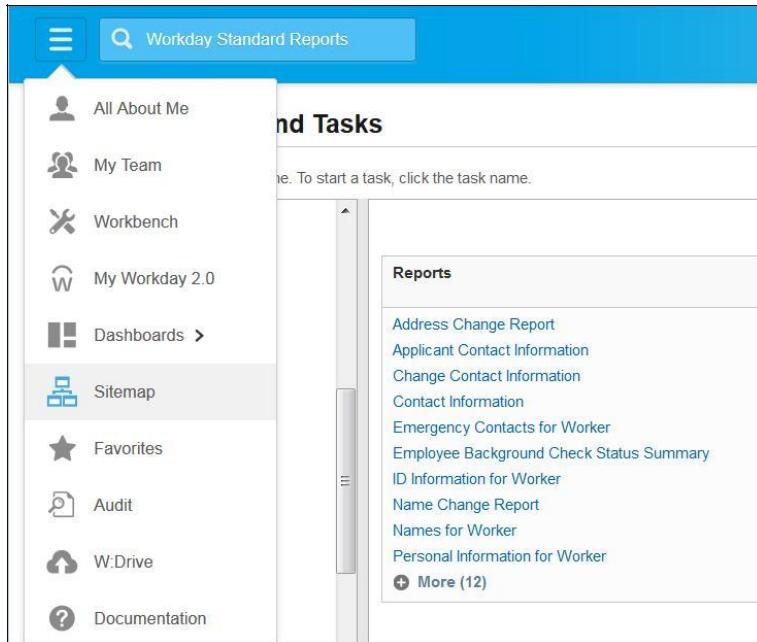
- Is there an existing report that meets (or is close to meeting) my need?
 - Can I copy one?
- Where is the data I need?
- What is the best way to group or sort the report?
- What should the output be filtered down to?
- Who is this report for?
- How will people find this report?
- What is the best way to display this report?
- How is this report delivered? Can I schedule it?
- How can I track reports, to know who owns what report, when a report was last updated or run, if a report is shared and more?

DELIVERED REPORTS

Before introducing the Workday Report Writer tool and creating custom reports, it is a good idea to first discuss the Standard Reports that are delivered in Workday.

Authorized users can see delivered reports using the **SiteMap** and selecting a **Category** for which to see

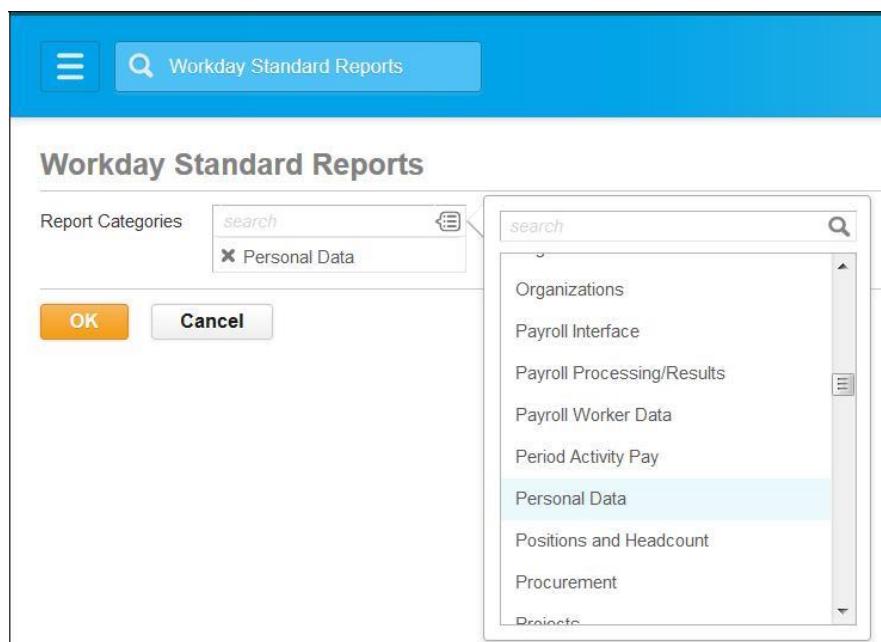
delivered reports and tasks. Users must have access to the Sitemap. Click on the main menu  icon in the upper left corner of the Workday page, and select Sitemap. Select a category to see delivered reports and tasks for that category. Using the Sitemap, users will only see delivered reports and tasks that they have access to.



Standard (delivered) Reports are also accessible by searching and running a report called: **Workday Standard Reports** and specifying a report category (or categories). Users with access to the **Custom Report Administration** domain can run **Workday Standard Reports**.

Workday Standard Reports will show much more detail about delivered reports, including the description, security, and type.

As you will see Workday delivers many reports. These reports are great starting points for your implementations. Though you cannot edit a delivered report, we will next see that you can COPY certain delivered reports to then edit and customize them to your requirements.



Workday Standard Reports

Let's now take a closer look at the **Workday Standard Reports** report to better understand what's delivered.

Displayed in the report output is the description of the report, the type of report (Report Writer or XpressO), whether the report is schedulable or not, and what domain controls the security necessary to run the delivered report.

Delivered reports come in two types: Report Writer or XpressO. The type indicates the tool the report was built in.

- Users can run any delivered report they have access to
- Users can NOT directly edit a delivered report
- Authorized users can COPY a delivered report if type=Report Writer

Report Writer for Workday

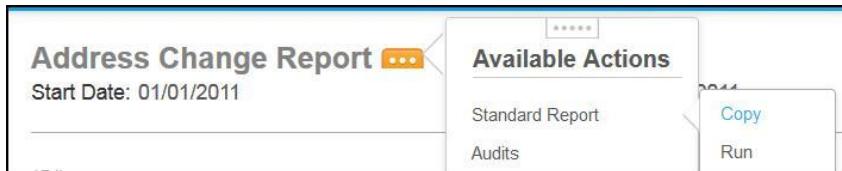
Workday Standard Reports ...					
Report Categories: Personal Data					
22 items					
Workday Reports					
Category	Report	Name	Description	Type	Schedulable
Personal Data		Address Change Report	View all worker address changes before or after a specified date or within a date range. Enables you to assess any impact of address changes to business processes or external systems. Required prompt: none Optional prompts: End Date, Start Date	Report Writer	Yes
		Applicant Contact Information	View an applicant's contact information, including address, phone numbers, email address, instant messenger ID, and web address. You can edit this information as a related action on the applicant's name. Enables you to verify an applicant's address for expense reimbursement. Required prompt: Applicant Optional prompt: none	XpressO	Yes
		Change Contact Information	Edit a worker's contact information, including addresses, phone numbers, email addresses, instant messenger IDs, and web addresses. Enables you to maintain accurate and current contact information for a worker. Required prompt: Worker Optional prompt: none	XpressO	Yes

Report Writer vs. XpressO reports

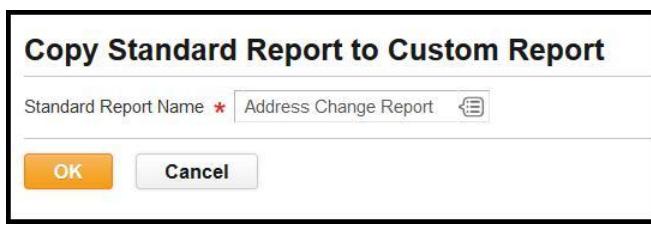
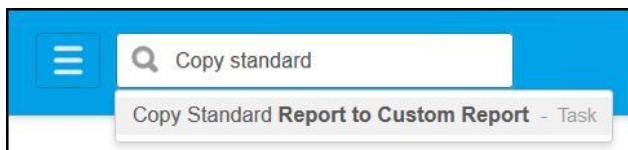
The first type of delivered report is a **Report Writer** report. These delivered reports can be copied and customized using the Workday Report Writer tool if close to what you need but not exactly as delivered.

You can **copy a Workday standard report** to a custom report in 2 ways:

1. First **run** the given standard report, and then use the related action icon next to the report object name and select **Standard Report > Copy**



2. Or, use the **Copy Standard Report to Custom Report** task in the search box and select the report to copy. The prompt will only show standard reports that are of type Report Writer.



The second type of delivered report is an **XpressO** report. **XpressO reports can NOT be copied**. You can run an XpressO report that you have access to by name from the search bar or from the Sitemap. Though XpressO reports cannot be customized, some include configuration templates. Good examples of XpressO reports that have configurations you can maintain are the payroll audit reports.

Access to delivered reports

Workday delivers reports in security **domains** and access to these reports is governed by security access to the domain. Each domain has a security policy and security policies can be configured with security groups to determine access to that domain. Workday's *Configurable Security Fundamentals* class goes into how you can configure access to domains. Users can only run delivered reports where they have a security group with configured access to the domain that the delivered standard report is in.

Search Results:

When searching for reports in the search box, you will see results in *Tasks and Reports* of matching reports to run, as well as an additional section of search results with matching object definitions depending on your search category. You can use related actions off the object definition to take action on the given object, e.g. edit the given custom report. You can also use search prefixes to hone in on a given type of object definition. The **rd:** search prefix can also be used to search for custom report definitions.



Tip: To see all available search prefixes and what each search category returns (e.g. Common vs. Reporting), type **?** in the search box.

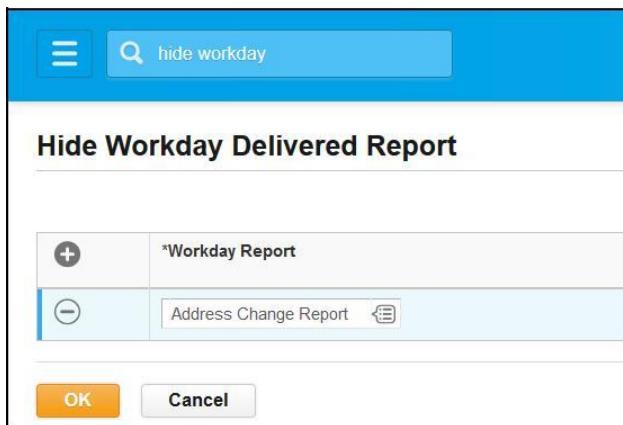
How Reports will show in search results

1. Tasks and Reports – matching results you can run (“executables”)
2. Search Category results – matching object definitions

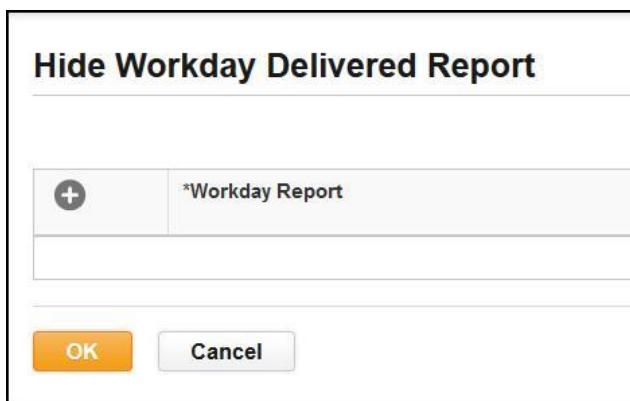
Hiding Standard Reports

The ability to hide delivered standard reports eliminates confusion with your users when you have created a custom report that should be run instead of the Workday delivered report. When you hide a standard report, it is no longer available in search results, menus, as a related action and is no longer searchable.

To hide a report, use the **Hide Workday Delivered Reports** task. This task is secured to the "*Setup: Tenant Setup - General*" domain. This is a tenant-wide task.



To un-hide a delivered report, you would run the same task: Hide Workday Delivered Reports and remove the report from the list.





ACTIVITY 1 – RUN & COPY A STANDARD REPORT

Business Case: Let's get familiar with Workday Standard (Delivered) reports and copy a delivered report. Once copied, we'll see how we now have a 'Custom Report' in the tenant that we can edit and define.

➊ Sign in as Logan McNeil (lmcneil)

FIND AND RUN A STANDARD REPORT

TASK 1: USING SITEMAP NAVIGATION:

- From the Main Menu (upper left), select **Sitemap**, and then select the **Personal Data** Category. See the list of delivered reports and tasks that Logan has access to. Run the **Address Change Report** by clicking on the link.

The screenshot shows the Workday Sitemap navigation. On the left, there is a sidebar with various links: All About Me, My Team, Workbench, My Workday 2.0, Dashboards, Sitemap (which is selected and highlighted with a yellow box), Favorites, Audit, W:Drive, and Documentation. The main content area is titled 'Tasks' and shows a list of tasks. Below that is a 'Reports' section containing the 'Address Change Report' and other report options like Applicant Contact Information, Change Contact Information, Contact Information, Emergency Contacts for Worker, Employee Background Check Status Summary, ID Information for Worker, Name Change Report, Names for Worker, Personal Information for Worker, and More (12).

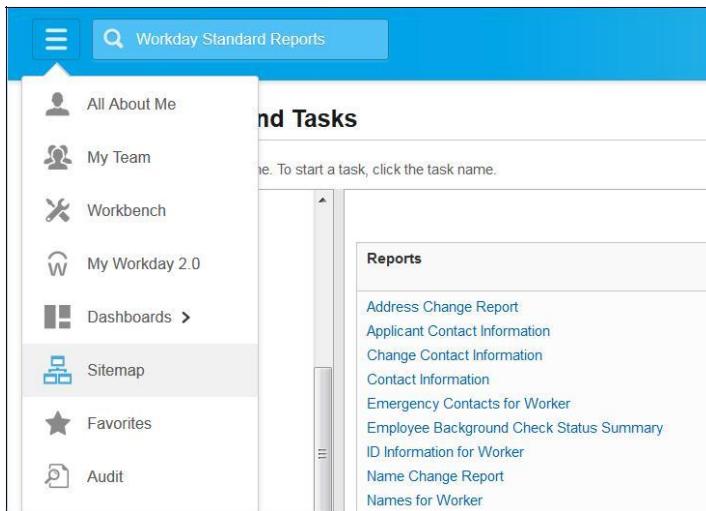
- Use the date prompts of **01/01/2011** to **12/31/2011** and view the output.

The screenshot shows the 'Address Change Report' output. At the top, it says 'Start Date: 01/01/2011' and 'End Date: 12/31/2011'. The table below has 17 items. The columns are: Date and Time Completed, Legal Name - Last Name, Legal Name - First Name, Legal Name - Middle Name, Legal Name - Social Suffix, Employee ID, Address ID, Address Line 1, Address Line 2, City, State/Province, Postal Code, Country, and Address ID. The first row shows data for Santiago with Employee ID 21009 and Address ID ADDRESS_REFERENCE-4-374. The second row shows data for Alves with Employee ID 21172 and Address ID ADDRESS_REFERENCE-4-491.

Date and Time Completed	Legal Name - Last Name	Legal Name - First Name	Legal Name - Middle Name	Legal Name - Social Suffix	Employee ID	Address ID	Address Line 1	Address Line 2	City	State/Province	Postal Code	Country	Address ID
02/28/2011 11:11:55.404 AM	Santiago	Pedro			21009	ADDRESS_REFERENCE-4-374	5067 Thomas Street		Annapolis	Maryland	21409	United States of America	ADDRESS_REFERENCE-4-374
06/20/2011 01:30:57.256 PM	Alves	Carlos			21172	ADDRESS_REFERENCE-4-491	R. Euclides de Andrade, 4016		São Paulo	Sao Paulo	05030-300	Brazil	ADDRESS_REFERENCE-4-491

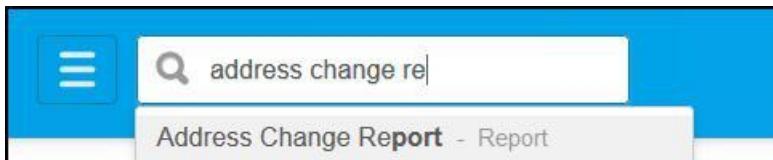
Report Writer for Workday

- Now let's go back to the Sitemap again and this time run an XpressO report in the same Personal Data Category: *Contact Information* (enter Adam Carlton as the worker). *We will see later in this activity how we know that Contact Information is an XpressO report.*



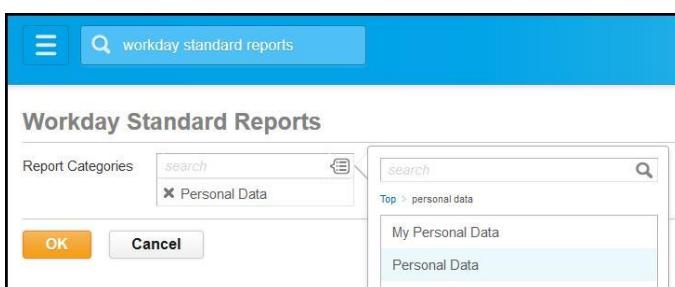
TASK 2: RUN A DELIVERED REPORT FROM THE SEARCH BOX:

You can also run reports by name from the search box vs. via the Sitemap. Use the search box to run the delivered *Address Change report* (Note, how the search will autofill matching results as you type)



TASK 3: RUN A DELIVERED REPORT FROM WORKDAY STANDARD REPORTS:

- Users with access to the *Custom Report Administration* domain can run **Workday Standard Reports** to see all delivered reports for a given report category (or categories). Standard reports of type Report Writer can be run directly from this report's output. XpressO reports cannot be run directly from this report output.
- Run **Workday Standard Reports** from the search box and choose the category of **Personal Data**.



3. **Note:** Workday Standard Reports will show you all delivered reports for a given report category. Remember that the Sitemap will only show you reports that you have access to for a given report category. Workday Standard Reports will also show more information about each report, including the description, security and type.
4. Under the **Report** column, use the related action icon to run the *Address Change Report: Standard Report> Run*

Enter 01/01/2011 – 12/31/2011 for the date prompts.

Workday Standard Reports ...			
Report Categories: Personal Data			
22 items			
Category	Report	Name	Description
Personal Data	...	Available Actions	View all worker address impact of address change
		Audits	Required prompt: none Optional prompts: End
		Integration IDs	
		Process	View an applicant's contact web address. You can enter the applicant's address for this report.
		Reporting	Required prompt: Application ID Optional prompts: none
		Security	
		Standard Report	Run
		UI Task	Contact web addresses. Enables UI tasks.
			Required prompt: Worker ID

5. This time, while viewing the output of the *Address Change Report*, use the related action icon next to the *Address Change Report* report object and choose **Standard Report> Copy**

Address Change Report ...		Available Actions
Start Date: 01/01/2011		Copy
Standard Report		Run
Audits		

6. Change the name of the newly copied report to *WICT RW Address Change Report* and click **OK**.
7. Click **OK** to save the report and then click **Done**. You just copied a delivered report of type report writer to a custom report!

Reminder: You can also copy standard reports to custom by running the standalone task: **Copy Standard Report to Custom** from the search box.

TASK 4: SEARCH RESULTS

1. You now have your own custom report version of this delivered report. Let's now search for the **Address Change Report** again in the search box.
2. Note how we now see two (2) results in Tasks and Reports: the delivered report to run and our custom report to run. (*If you do not see your custom report in the search results, wait a minute and try searching again, as when a custom report is first created, search indexes need to be updated.*)

Report Writer for Workday

3. Note how we only see one object definition for the All of Workday search category. Why? We can only take action on the custom report object definition, not the delivered report.

The screenshot shows the Workday Report Writer interface. At the top, there is a blue header bar with a search bar containing the text "address change report". To the right of the search bar is the "workday" logo. Below the header, on the left, is a sidebar titled "Categories" listing various report types: Common, Assets, Banking, Expenses, Financial Accounting, Integrations, Organizations, Payroll, and People. On the right, under the heading "Search Results 3 items", there are two entries under "Tasks and Reports": "Address Change Report" and "WICT RW Address Change Report". Both entries have a brief description and a "Report Definition" link below them. The "Address Change Report" entry is expanded, showing its full description and the "Report Definition" link.

TASK 5 – OPTIONAL/HOMEWORK

1. Run *Workday Standard Reports* and select report categories that you are functionally interested in, e.g. Financial Accounting, Payroll, Benefits, etc.
2. See the list of delivered reports, read their descriptions, and note the type (Report Writer vs. XpressO) to see if they are potential reports you can copy.

(End of Activity)

REPORT WRITER TERMINOLOGY & CONCEPTS

The following table compares Workday concepts with familiar database terminology:

▪ Reporting Concepts	Workday	RDBMS
Object: Worker	 Object (PBO)	≈ Table
Report Data Source (RDS): All Workers Or All Retirees Or My Direct Reports	Report Data Source (RDS)	≈ View
Class Report Fields (CRF):  Name  Date of Birth  Has Beneficiaries  Dependents etc....	Class Report Field (CRF)	≈ Column
	Related Object (RBO) 	≈ Child Table
	Instance	≈ Row

BUSINESS OBJECTS, FIELDS & INSTANCES

BUSINESS OBJECTS

Workday stores your data as **business objects** - organizations, workers, positions, and so on- which can be thought of as database tables or worksheets in Excel. Just as a database table or worksheet has columns and rows, a Workday business object has **fields** and **instances**.

FIELDS & INSTANCES

Instances of a business object in Workday are like rows in a table or spreadsheet. Each instance represents a unique occurrence of that type of object such as a given organization or worker. A business object can have no instances, one instance, or many instances.

A business object is composed of a set of related fields, similar to how a table or spreadsheet is composed of a set of related columns. Workday automatically links related business objects together.

When working with Workday Custom Reports, you can select available fields depending on your security and these fields can be **Workday delivered fields, Calculated Fields or Custom Fields**.

Calculated Fields

Calculated fields allow users to perform simple arithmetic, date calculations, text manipulation, logical expressions, retrieval of related data, formatting and transformations of their existing data. You can use calculated fields in reporting, business processes, integrations, scheduling recurring processes, and other areas within Workday. Calculated fields can be based on existing Workday-delivered fields, other Calculated Fields or available Custom Fields.

Custom Fields & External Data

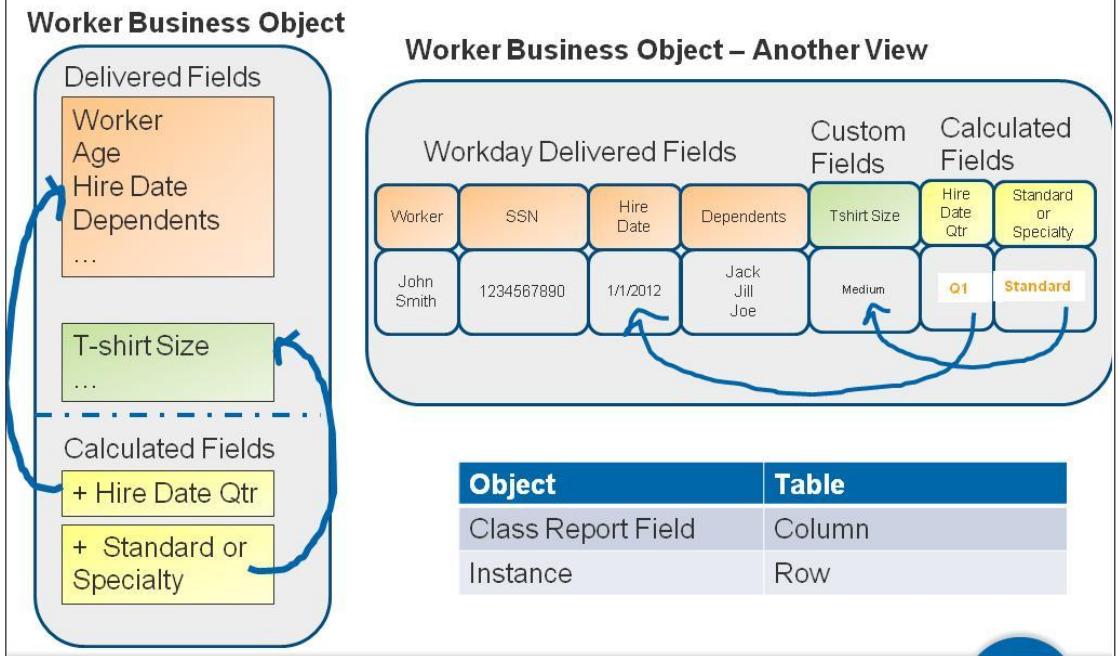
Custom fields allow you to enter, maintain and report on additional data not managed in Workday. Custom Fields are currently enabled for a select list of business objects, such as **Worker and Job Profile**. Please see the latest documentation for a full and complete list of supported business objects.

Custom fields look and behave similar to Calculated Fields and can be used wherever Calculated Fields can be used. You can display, sort, filter, and create report prompts based on Custom Fields.

You can also report on **external data** not managed by Workday by leveraging custom fields and by populating the data via integrations. Workday provides access to a limited amount of external data that is a natural extension of Workday Business Objects. External data is persisted within Workday and is populated via integrations. You can report on data that originates outside Workday by creating an integration to a custom field (or set of custom fields).

For example, you store 401(k) data for employees externally. By creating a custom field in Workday to store the 401(k) balance for a worker, and also creating an integration between your 401(k) system and the associated Workday custom field, you can populate the custom field with data from your external 401(k) system. This data is then stored in a Workday custom field enabling you to use Workday features such as calculated fields, custom reports, and analytics to report on and analyze the 401(k) data.

Terminology – An Example



HOW DO YOU KNOW WHAT BUSINESS OBJECTS EXIST IN WORKDAY?

The **Business objects by Category** report is a useful resource that shows you the main business objects that capture and represent the data for a given functional area.

When you click on a listed Business Object in this report output, you will then see the details of the business object, including available fields, and related business objects. We will discuss Business Object Details a little later in class.

Business Objects by Category	
Category: Expenses	Change
6 items	
Category	Business Object
Common Expenses	Spend Category
Expenses	Expense Item
Expenses	Expense Payment
Expenses	Expense Report
Expenses	Spend Authorization
Expenses	Spend Category Hierarchy



It is important to get familiar with these business objects ("tables") and the relationships between them when reporting in Workday.

REPORT DATA SOURCES

DATA SOURCES

Data sources are defined and delivered by Workday. Workday delivers different data sources for the key primary business objects.

To create a custom report you must specify a data source. The data source is associated with a primary business object and the selection of the data source is the first and most important step in developing a custom report. You can think of the data source as the 'view' or starting selection or 'starting filter' for reporting on the given primary business object.

The same primary business object may be represented by more than one data source depending on filtering and roles required. The Primary Business Object is important because it dictates the list of Related Business Objects that are available to include in that report.

Each data source associated with a primary business object has its own security. The access defined for a data source controls whether a user can create or run a custom report based on that data source. Different data sources for a single primary business object may be delivered by Workday to allow reporting on different sets of instances, depending on the security access of the user.

A data source can be designed to return all instances of the primary business object (All Workers), or it can have built-in filtering logic defined by Workday (e.g. All Retirees). If it has built-in filtering, the filter comparison value(s) can either be built into the data source (All *Active* Employees) or designed so the user is prompted for the comparison value when running the report (Employees by Organization, which always prompts the user for an Organization he or she manages or supports).

INDEXED DATA SOURCES

There are two types of data sources--- Standard and Indexed. Indexed data sources are a special type of data source optimized for performance, aggregation, and faceted filtering on large volumes of data. Because indexed data sources are optimized for special uses, they do not feature all the functionality provided by standard data sources. Within standard data sources you will find that many data sources all reference the same business object. For example, there are about 35+ data sources that all reference worker/employee. Indexed Data Sources have filters that allow us to have one data source for a business object. Multiple filters can then be associated with that business object. Only Indexed data sources can have filters. When you create a custom report based on an indexed data source, a prompt enables you to select from a list of predefined filters for the data source.

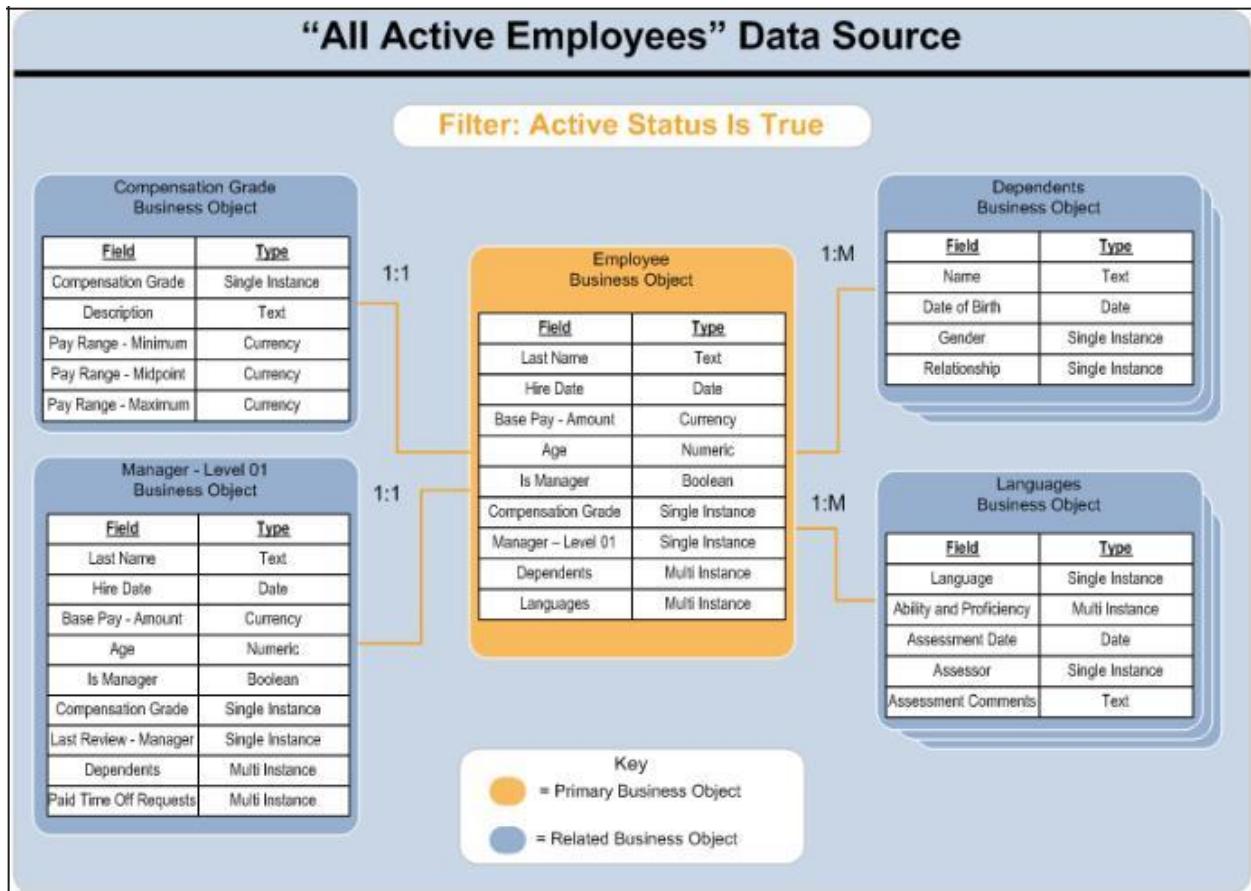
Examples: Indexed Workers, Trended Workers, Indexed External Payroll Results, Journal Lines

This course will focus only on Standard Data Sources.

DATA SOURCES EXAMPLE

The following is an example of a data source in Workday.

The **All Active Employees** Data Source will yield one instance of data for every employee that is active. The number of instances could be further reduced by adding a filter to the custom report definition.



In the **All Active Employees** data source above, the primary business object is **Employee** and the data source has a *built-in filter to return only employees whose Active Status is True* to the Report Writer. Using the All Active Employees data source, you can access fields on the Employee Business Object and fields on related business objects depending on your security. All relationships between the business objects are automatically managed.

HOW DO YOU KNOW WHAT DATA SOURCES ARE DELIVERED?

Workday delivers a report called **Data Sources** that lists all Workday delivered data sources grouped by their primary business object. This report is a valuable resource when you are determining which data source to use in your report. It gives a description of each data source, lists built-in prompts and as well as which security groups have access to it. For Indexed Data Sources, Data source filters are also listed.

When wanting to report on a given object as your Primary Business Object, you can use this report to see delivered data sources by primary business object.

Data Sources ***									
800 items									
Data Source	Primary Business Object	Description	Built-in Prompts	Security Groups	Category	Data Source Filters			
						Data Source Filter	Description	Built-in Prompts	Security Group
Time Entry Events for a Date Range	Time Review Event	All Time Events for a Time Period.	End Date Start Date	Employee As Self Implementers Management Chain Manager Payroll Partner Project Administrator Timekeeper Time Tracking Administrator	Time Development				
1099 MISC	1099 MISC	Accesses the 1099 MISCs as its primary object. Returns all 1099 MISCs.		1099 Analyst 1099 System Controller Finance Auditor Implementers	Supplier Accounts				

Each Data Source drives reporting on one Primary Business Object. When you select a data source for your report, it will then drive your report's Primary Business Object.

For example, if you choose the data source "All Retirees", your primary business object will be Worker. You can then pick fields off of the Worker business object for your report, yet the only 'instances' of workers you will see in the report output would be retirees. The data source provides that starting filter.

If on the other hand, you'd used "My Direct Reports" for your data source, your primary business object for your report would still be Worker, but when a given user runs the report, they'd only see instances of workers that represent that user's direct reports.

Note: Though Data Sources commonly filter the number of instances returned (e.g. All Active Employees vs. All Workers), they can also drive different report output results for given fields given underlying behavior in the data source. It is important to read the description of each data source to understand how it behaves and to test how the data source works in your report output. We will see this in an upcoming activity.



Tip: your choice of data source may impact the performance of your report. Indexed data sources can offer better performance. Data sources with built-in filters can also be more effective and efficient than using a 'larger' more generic data source and then configuring report filters to reduce the number of instances within the report.

See Appendix B for more information on report performance tips.

SOME COMMONLY REFERENCED DATA SOURCES IN REPORTS

For Reports pertaining to Worker Data:

- WORKER DATA (Category)
 - ALL ACTIVE EMPLOYEES
 - ALL WORKERS*
 - ALL ACTIVE AND TERMINATED WORKERS*
 - MY DIRECT REPORTS
 - INDEXED WORKERS
 - TRENDED WORKERS

For Reports pertaining to a WORKER that focus on a Workers' staffing movements like Transfers, Promotions & Demotions:

- STAFFING HISTORY (Category)
 - STAFFING EVENTS – ALL
 - STAFFING EVENTS – APPROVED
 - TERMINATIONS
 - TRENDED WORKERS

For Reports pertaining to Business Process Transactions (e.g. Worker Events):

- BUSINESS PROCESS FRAMEWORK (Category)
 - ALL BUSINESS PROCESS TRANSACTIONS*
 - ALL BUSINESS PROCESS TRANSACTIONS BY TYPE
 - ALL BUSINESS PROCESS TRANSACTIONS BY TYPE COMPLETED IN DATE RANGE
 - ALL BUSINESS PROCESS TRANSACTIONS BY TYPE CREATED IN DATE RANGE
 - ALL BUSINESS PROCESS TRANSACTIONS BY TYPE EFFECTIVE IN DATE RANGE

For Reports pertaining to Financials:

- FINANCIAL ACCOUNTING (Category)
 - JOURNAL LINES
 - JOURNALS
- EXPENSES (Category)
 - Expense Reports
 - Expense Report Lines
- SUPPLIER ACCOUNTS (Category)
 - Supplier Invoice Lines
 - Supplier Invoices



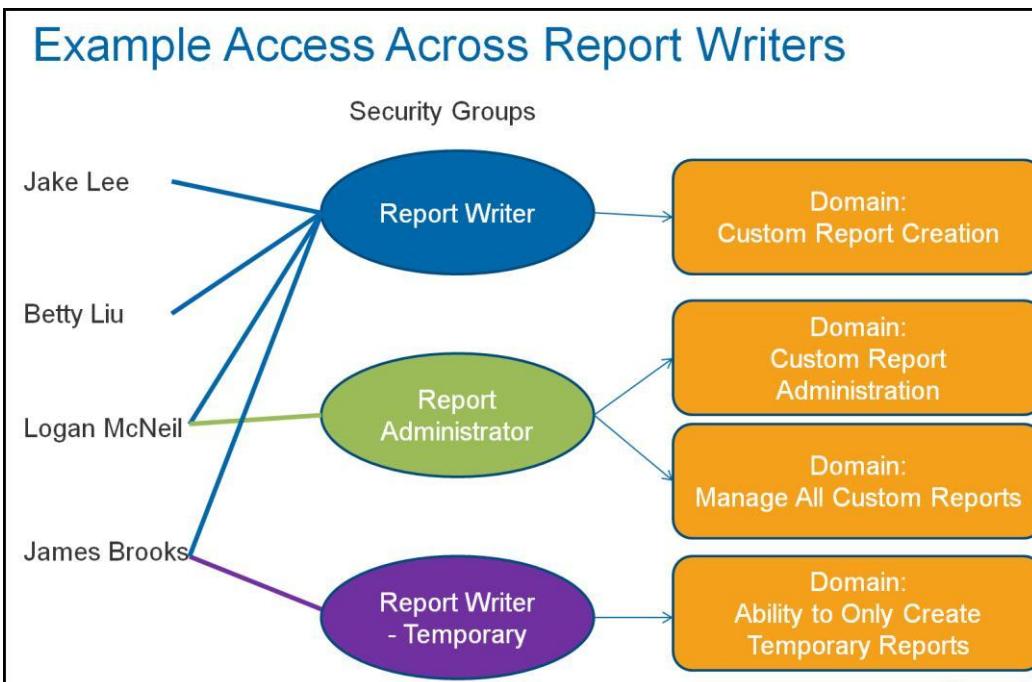
**General data sources that for example show 'all' instances of workers or 'all' business process transactions in your tenant can return large sets of data not necessarily needed in your report. Consider using a data source that is more targeted or indexed for improved design and performance.*

REPORT WRITER "TOP 10"

Custom reports are designed and built by customers using the **Workday Report Writer tool**. They can be created new or as a copy of another standard or custom report. Workday reports are **actionable** where you can drill down on items to obtain additional information and use related tasks to perform authorized actions on items within that report. As we will see, custom reports can be scheduled, translated, shared, and more.

What you need to know about **Report Writer**:

1. **Report Writer** is Workday's custom report writing tool
2. Access to Report Writer is by the assignment of the **User-based Security Group: Report Writer** (or with access to the **Custom Report Creation** domain)
3. You can also designate **Report Administrators** with greater access to report creation and management tasks via designated security domains (e.g. Custom Report Administration, Manage All Custom Reports). For a list of reporting functionality related domains, see Appendix A.
4. You can copy Workday delivered reports that are of type Report Writer.
5. Every Custom Report can only have one report owner.
6. Only the owner can edit/delete/view his or her own custom reports. (Report Administrators can also have access if configured)
7. Report ownership can be transferred between report writers.
8. Custom reports are by default not shared and are not visible to anyone in tenant until shared.
9. Report writers can only create reports where they have **access to the data source and report fields**
10. Report writers can only **share their report with those who have access to the report's data source**. Workday's security model will control what users see.



STEPS TO CREATE A REPORT

The **Create Custom Report** task initiates the creation of a custom report. When creating a custom report, you must select a **Report Type** and **Report Data Source** which is the first step in defining your report. In addition, you can also optionally indicate whether your report is to be a Temporary Report or if it is to be Web Service Enabled, as shown below.

Create Custom Report

Report Name: *

Report Type: * Simple

Data Source: * search

Temporary Report:

Web Service Enable:

OK **Cancel**

Once you have selected the report type and data source, you would then select fields, order columns, sort and filter your report output to meet your requirements. High level process steps are:

1. Choose Report Type and Data Source
2. Select Fields: either Objects or "Simple Types"
3. Order Columns
4. Sort Output (optional)
5. Define Filter Criteria (optional)

REPORT TYPES

Workday Report Writer provides the following report types for creating custom reports and custom analytic solutions. In this course, we will cover **Simple, Advanced and Matrix** report types.

Create Custom Report

Report Name: *

Report Type: * Advanced

Advanced

Composite

Matrix

nBox

Search

Simple

Transposed

Trending

OK **Cancel**

- **Simple Report:** A simple report provides straightforward design options for the beginning or occasional user to create reports quickly and easily with limited options.
- **Advanced:** An advanced report type provides all the features of a simple report, plus more advanced ones such as accessing related business objects and producing multiple levels of headings and subtotals. Advanced reports also enable the use of sub-filters, run time prompts, charts, worklets, and report sharing, and provide the ability to expose the report as a web service.
- **Matrix:** A matrix report type forms the foundation for custom analytics. It allows you to group data, summarize metrics for those groupings and then allows the user to further drill into the summarizations by other dimensions or fields.
- **Search:** A search report type displays search results based on values selected for facet filters on the report.
- **Transposed:** A transposed report type interchanges the rows and corresponding columns on the report.
- **nBox:** An nBox report type counts data and displays the results in a 2-dimensional matrix.
- **Trending:** A trending report type is similar to a matrix report with a time period element. It is commonly used to report and analyze trended worker data, like headcount and attrition, over time.
- **Composite:** A Composite report type allows you to combine several existing matrix reports into one report. Each matrix report is considered a sub-report and each matrix report can have its own data source. The resulting composite report can then show data across multiple data sources if each matrix sub report uses a different data source.

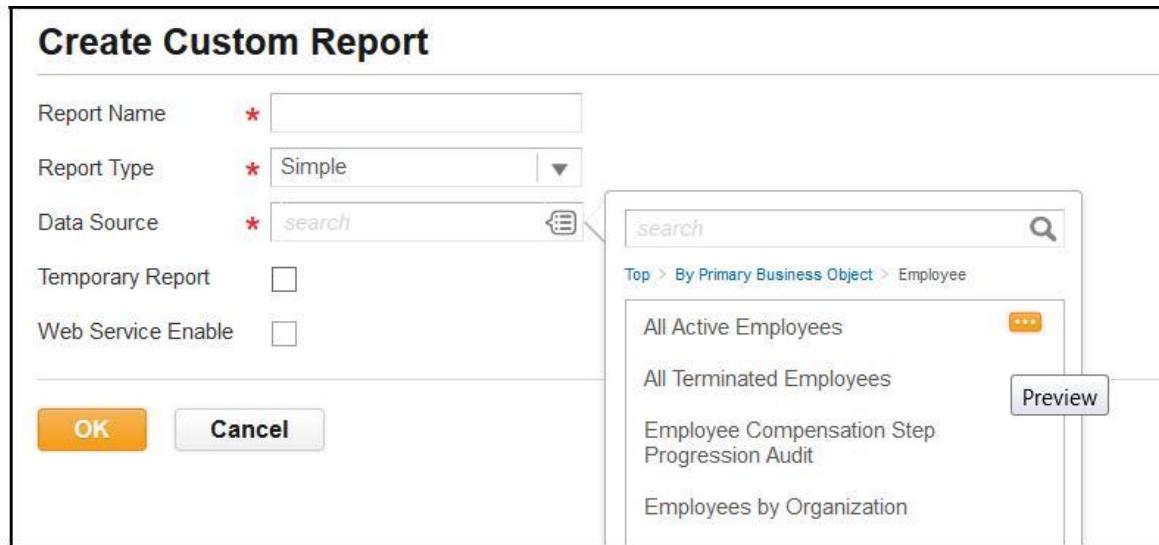
The screenshot illustrates the Workday Report Writer interface, demonstrating various report types:

- Advanced:** Shows a list of workers and their assigned job profiles.
- Search:** Displays a search interface for finding workers based on various filters like Nominations, Talent Pools, and Business Process.
- Matrix (as a Worklet):** A pie chart titled "Headcount by Country" with categories like Executive, Manager, and Other.
- Trending:** A bar chart showing headcount and FTE by month over a year.
- Transposed:** A grid-based report showing performance data for various employees.
- nBox:** A matrix view showing data counts for different categories.
- Composite:** A summary report comparing actual vs budget vs prior year for Global Modem Services (USA).

At the bottom left, it says "WORKDAY CONFIDENTIAL".

SELECTING A DATA SOURCE

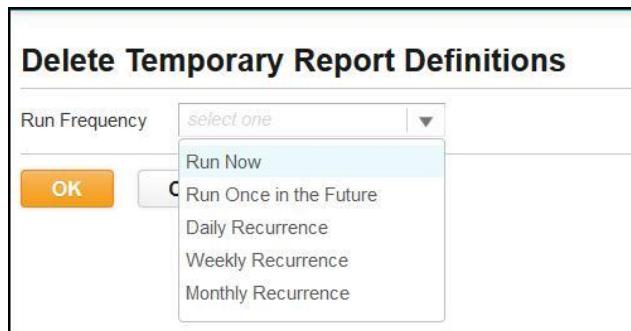
When creating a custom report, one of the most important decisions will be selecting your report's data source. This selection drives the primary business object for your report and the 'view' or selection of that data that you require. Data sources provide your 'starting filter' for your report. You can search on data sources by name, by category, by business object or a combination of category and business object.



TEMPORARY REPORTS

Workday provides for the ability to mark a report as Temporary, which means that the report has a defined period of time before it expires and becomes eligible for deletion in the tenant. If you mark a Simple report type as temporary, it will expire and is eligible for deletion after 7 days. If you mark other report types as temporary (e.g. Advanced, Matrix), you can configure the expiration date to something other than 7 days as needed (7 days being the default). Reports can be set as temporary or unset to permanent as a configuration option. Simple report types, once defined as temporary cannot be changed to permanent or vice versa. You could however copy a simple report that was temporary and make the copied version permanent.

The **Delete Temporary Report Definitions** task is used to delete temporary reports in a tenant that have expired and are eligible for deletion. This task can be scheduled to run once or recurring. This process will permanently purge expired reports from your Workday tenant.



Users with security group access to the **Custom Report Administration** domain have the ability to schedule the **Delete Temporary Report Definitions** task.



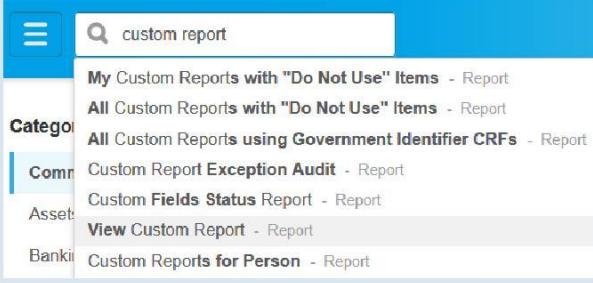
Tip: if you create a custom report and then cancel the report or if your session times out, your report will be saved as a temporary report. Be sure to either delete the report, or change it to not be temporary as needed.

LIMITING SOME REPORT WRITERS TO ONLY TEMPORARY REPORTS

You may not want to give all Report Writers the ability to create permanent reports that consume system resources indefinitely. Therefore, Workday enables you to restrict specific Report Writer users so that they only have the ability to create temporary report definitions. These temporary report definitions will expire in 7 days after creation. Users associated with security groups configured for the **Ability to Create Only Temporary Reports** domain will be limited to just temporary reports. This access can support ad-hoc reporting needs and can help separate groups of reports writers in the tenant based on your implementation requirements. Report Administrators can still access such temporary reports and mark them as permanent or change the expiration dates as needed.

REPORT WRITER NAVIGATION

There are multiple methods to navigate to Workday's Report Writer tool and the tasks around creating and configuring custom reports in Workday.

Method	Description
SEARCH	<p>You can search for and run Report Writer tasks from the search box</p>  <p>The screenshot shows a search bar with the text "custom report". Below the search bar, there is a list of search results:</p> <ul style="list-style-type: none">My Custom Reports with "Do Not Use" Items - ReportAll Custom Reports with "Do Not Use" Items - ReportAll Custom Reports using Government Identifier CRFs - ReportCustom Report Exception Audit - ReportCustom Fields Status Report - ReportView Custom Report - Report (This item is highlighted in grey)Custom Reports for Person - Report
SITEMAP	Using the Sitemap, Report Writer category you can see all tasks and reports related to Report Writer.

	<p>Available Reports and Tasks</p> <p>To view a report, click the report name. To start a task, click the task name.</p> <table border="1"> <thead> <tr> <th>Reports</th> <th>Tasks</th> </tr> </thead> <tbody> <tr> <td>Business Object Details</td> <td>Copy Custom Report</td> </tr> <tr> <td>Calculated Fields Defined</td> <td>Copy Standard Report to Custom Report</td> </tr> <tr> <td>Custom Reports for Person</td> <td>Create Analytic Indicator</td> </tr> <tr> <td>Data Sources</td> <td>Create Business Form Layout</td> </tr> <tr> <td>Grid Configuration Audit</td> <td>Create Custom Report</td> </tr> <tr> <td>HCM Classes with Class Report Fields</td> <td>Create Gauge Range</td> </tr> <tr> <td>HCM Class Report Fields</td> <td>Create Grid Configuration</td> </tr> <tr> <td>HCM Reporting Components</td> <td>Create Report Group</td> </tr> <tr> <td>Maintain Summarization Calculation for Report</td> <td>Create Worker Trending Data</td> </tr> <tr> <td>More (21)</td> <td>More (19)</td> </tr> </tbody> </table>	Reports	Tasks	Business Object Details	Copy Custom Report	Calculated Fields Defined	Copy Standard Report to Custom Report	Custom Reports for Person	Create Analytic Indicator	Data Sources	Create Business Form Layout	Grid Configuration Audit	Create Custom Report	HCM Classes with Class Report Fields	Create Gauge Range	HCM Class Report Fields	Create Grid Configuration	HCM Reporting Components	Create Report Group	Maintain Summarization Calculation for Report	Create Worker Trending Data	More (21)	More (19)
Reports	Tasks																						
Business Object Details	Copy Custom Report																						
Calculated Fields Defined	Copy Standard Report to Custom Report																						
Custom Reports for Person	Create Analytic Indicator																						
Data Sources	Create Business Form Layout																						
Grid Configuration Audit	Create Custom Report																						
HCM Classes with Class Report Fields	Create Gauge Range																						
HCM Class Report Fields	Create Grid Configuration																						
HCM Reporting Components	Create Report Group																						
Maintain Summarization Calculation for Report	Create Worker Trending Data																						
More (21)	More (19)																						
RELATED ACTION ICON	<p>It is important to remember that a Report is an object in Workday. Once you find your report it will have a related action icon. The related action icon can then be used to initiate the Report Writer tasks.</p>																						
WORKBENCH	<p>The Workbench Landing page can be used by Administrators & Report Writers to access Reporting & Analytics related tasks via the Reporting & Analytics worklet.</p>																						



ACTIVITY 2 – CREATE CUSTOM REPORT (TYPE=SIMPLE)

Business Case: Logan McNeil has been asked to create a report that list data about a worker and the worker's expense reports.

TASK 1 CREATE CUSTOM REPORT

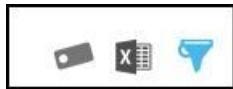
1. Design

- What is the Primary Business Object for your report: _____
 - What Data Source (view, "window", selection, "starting filter" into the Primary Business Object) do you need: _____
 - Do you need both employees and contingent workers?
 - Do you need both active and terminated workers?
 - Do you need to see all instances when running the report, or do you need certain selections, such as workers by organization or my direct reports?
- Search for the string *Create Custom Report*.
 - Select the **Create Custom Report** task.

Field Name	Entry Value
Report Name	WICT RW Training Report 1
Report Type	Simple
Data Source	Search by Primary Business Object: Worker Select Data Source: All Workers

- Click the **OK** button to initiate the Report Writer editing page.
- Under the **Columns** tab, add the following fields by clicking on the add row icon  icon. Enter the field name and choose the field from the resulting prompt list.
 - Worker (*Tip: in the field name, when you enter "worker", a prompt box will pop up showing you matching fields that contain worker, instead of scrolling through the list of fields, type: worker on your keyboard and the selection will jump to the field 'worker'.*)
 - Active Status

- c. Worker Type
 - d. Employee Type
 - e. Full Legal Name
 - f. Hire date
 - g. Location
 - h. Supervisory Organization
 - i. Cost Center
 - j. Age
 - k. Expense Reports – All Statuses
6. Save the report by clicking **OK**.
7. Note options to Test or Run. Click the **Test** button and view the results. Count how many rows are returned, and notice the results are sorted alphabetically.
8. Re-Run the report using the related action icon  (**Custom Report > Run**).
9. Note that more rows are returned. Are the initial rows from the Run the same as the rows from the Test? No. "Test" will only return up to 10 rows of output, while Run will show all returned results.
10. View the results:
- a. Notice how some fields are actionable (blue/hyperlinked) vs. not (black/static text). We will see how the field type drives whether the field is actionable or not.
 - b. See how our data source "All Workers" is showing potentially all active AND terminated workers, including all employees AND contingent workers in the tenant. Consider performance and if you really need this entire set of workers.
 - c. Notice how you can filter the results, export the results to excel or pdf on your desktop or tag the workers to a talent pool using the icons in the upper right.



11. Click the **Filter** icon to see if there are any employees with a blank **Location**, blank **Supervisory Organization**, and blank **Cost Center**.



Report Writer for Workday

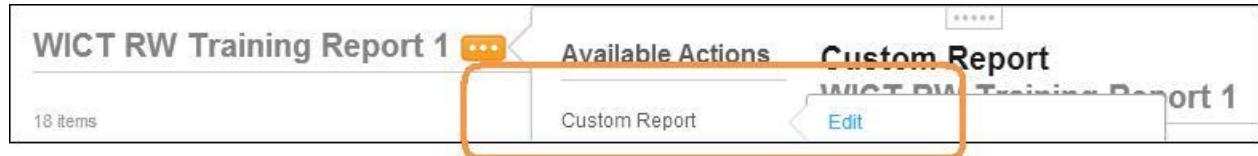
WICT RW Training Report 1 ...											X	Y	T
26 items											X	Y	T
Worker	Active Status	Worker Type	Employee Type	Full Legal Name	Hire Date	Location	Supervisory Organization	Cost Center	Age	Expense Reports - All Statuses	X	Y	T
Filter	Filter	Filter	Filter	Filter	Filter	X <Blanks>	X <Blanks>	X <Blanks>	Filter	Filter			
Leigh Hastings (Retired)		Employee		Leigh Hastings	01/01/2000						57	Expense Report: EXP-00003375	
Stefan Janowski (Terminated)		Employee		Stefan Janowski	01/01/2000						46	Expense Report: EXP-00003432	
Lucas Amaral (Terminated)		Employee		Lucas Amaral	01/01/2000						41		

12. See how the workers with blank locations, cost centers and supervisory organizations are those who are not active (i.e., Active Status column is 'blank').
13. Given the ones with hire dates in the past, what if we wanted to know what location or organization they were in if they used to be active? In the next activity we will change the report's data source to see information for terminated workers as of their last day of work.

TASK 2 – EDIT THE REPORT

1. Let's go back and edit the report one more time.

Use the related action icon for your report object to go back and Edit the report again. Navigate to **Custom Report > Edit**.



2. Change the order of fields using the order arrows. Move the **Hire Date** field to be the second field in the report.



3. For the **Active Status** field, configure the options to *Show No when False*. In Workday, Boolean fields by default show 'yes' when true and blank when false. If you prefer to see 'no' when false, you can set it as an option in the report.

Columns		Sort	Filter
10 items			
<input button"="" type="button" value="(-)"/>	▼ ▲	Worker <input checked="" type="checkbox"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Hire Date <input type="text"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Active Status <input type="button"/> <input type="button"/>	
			<input type="text"/> search <input type="button"/> <input checked="" type="checkbox"/> Show No When False

4. Add column heading overrides to change the column names if you want them to be different than the field name. Configure a column heading override for the **Full Legal Name** field to be just: *Legal Name*.

5. Remove the Age field from the report definition.

Columns		Sort	Filter
9 items			
<input button"="" type="button" value="(-)"/>	▼ ▲	Worker <input checked="" type="checkbox"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Hire Date <input type="text"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Active Status <input checked="" type="checkbox"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Worker Type <input checked="" type="checkbox"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Employee Type <input checked="" type="checkbox"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Full Legal Name <input checked="" type="checkbox"/> Legal Name <input type="text"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Location <input checked="" type="checkbox"/>	
<input button"="" type="button" value="(-)"/>	▲ ▼	Cost Center <input checked="" type="checkbox"/>	
			<input type="text"/> search <input type="button"/>

6. Click **OK** and **Run** the report.

7. As you can see there are many configuration options under the Columns tab in your report definition, from adding and removing fields, changing the order of fields to column headings, formats and field options.

(End of activity)



ACTIVITY 3 – CHANGE THE DATA SOURCE ON THE REPORT

Business Case: Logan McNeil is unsure why some employees are missing some fields. Upon further investigation it appears that the Data Source description might explain the mystery of the missing fields.

TASK 1 - EDIT CUSTOM REPORT

1. From the search box, run the task: **Edit Custom Report**
2. Select your **WICT RW Training Report 1**
3. Expand the **Additional Info** section, and read the Data Source description.

Edit Custom Report
WICT RW Training Report 1 ...

Report Name	* WICT RW Training Report 1	Report Tags	search
Report Type	Simple		
Data Source	* All Workers		
Data Source Type	Standard		
Primary Business Object	Worker		
Additional Info Data Source Description: Accesses the Worker as its primary object. The Worker object returns one row per worker. Includes all workers including workers hired in the future. If the worker is hired in the future, all fields will be returned based on the effective date. If no effective date is specified, the system will use the current date as the effective date. If the effective date is less than the worker's hire date, no effective dated information (e.g. position information, compensation information, etc.) will be returned. Does not contain any built-in prompts. If effective dated behavior is desired, use "All Active and Terminated Workers" data source instead. Comments:			

4. Let's try changing the report's data source from "All Workers" to "All Active and Terminated Workers" to see if the data returned will be different or not.
5. Edit your report's data source and select: **All Active and Terminated Workers**

Edit Custom Report
WICT RW Training Report 1 ...

Report Name	* WICT RW Training Report 1
Report Type	Simple
Data Source	* All Workers
Data Source Type	Standard
Primary Business Object	Worker
Additional Info Data Source Description: Accesses the Worker as its primary object, based on the effective date. If no effective date is specified, the system will use the current date as the effective date. If the effective date is less than the worker's hire date, no effective dated information (e.g. position information, compensation information, etc.) will be returned. Does not contain any built-in prompts. If effective dated behavior is desired, use "All Active and Terminated Workers" data source instead.	

search

- All Active and Terminated Workers
- All Retirees
- All Workers
- Audit-Workers with Multiple Jobs having Different

6. Read the description of this data source. See how the "All Active and terminated workers" data source returns data for **terminated workers as of their last day of work**. Also keep in mind that *All Workers* will show future hires as well, while All Active and Terminated Workers will not show future hires.
7. Click **OK** to save your report and Run.
8. Notice how now you can see the Location and Organizational information a terminated worker was in as of their last day of work.

WICT RW Training Report 1 [...]											
22 items											
Worker	Active Status	Worker Type	Employee Type	Full Legal Name	Hire Date	Location	Supervisory Organization	Cost Center	Age	Expense Reports - All Statuses	
Leigh Hastings	No	Employee	Regular	Leigh Hastings	01/01/2000	Atlanta	Product Strategy Group	32100 R&D - Product Strategy	54	Expense Report: EXP-00003375 Expense Report: EXP-00003432	
Kevin Gibson [C]	No	Contingent Worker		Kevin Gibson	10/01/2009	Atlanta	IT Services Group	61130 Information Analysis	41		
Adrian Martin [C]	No	Contingent Worker		Adrian Martin	02/01/2011	Atlanta	Marketing Communications Group	72200 Marketing Communications	38	Expense Report: EXP-00003304 Expense Report: EXP-00003308	



Important: All Active and Terminated Workers can be a slow-performing data source. Consider a more targeted data source where all possible.

TASK 2 – TRY OTHER DATA SOURCES

1. Edit your custom report and change the report data source to: *All Retirees*

Click OK to save and run your report

2. Edit your custom report and change the report data source to: *My Direct Reports*

Click OK to save and run your report.

3. Edit your custom report and change the report data source back to: *All Workers*

Key Points:

1. See how by changing your report's data source you controlled the 'view' or selection of workers your report returned as well as the data returned. It is important to read your data source descriptions.
2. Also note how once you create your custom report, you cannot edit your report's Primary Business Object (e.g. Worker). You can only edit the data source to another data source that is valid for that Primary Business object.

(End of Activity)

REPORT OUTPUT VS. REPORT DEFINITION

Report Output:

Report output in Workday is actionable and report output can also be filtered down in the UI and exported to your desktop in pdf or excel format, if authorized. There are several options to manipulate and view your report output in Workday:

WICT RW Training Report 1 [...]								
338 items								
Worker	Hire Date	Active Status	Worker Type	Employee Type	Legal Name	Location	Cost Center	Expense Reports - All Statuses
Abby Brennan [C]	01/04/2010	Yes	Contingent Worker		Abby Brennan	Chicago	33100 Global Support - North America	
Adam Carlton	06/14/2010	Yes	Employee	Regular	Adam Carlton	Boston	41200 Payroll	
Adrian Martin	02/01/2012	Yes	Employee	Regular	Adrian Martin	Atlanta	72200 Marketing Communications	

- Use the filter icon to filter results 
- Sort columns (click on Column Heading to sort)
- Tag results to Talent Pools (if report is about Workers) 
- Export report output to a pdf or excel file on your desktop
 - o See domain: **Export Output to PDF or Excel** to control access in tenant to this option.
 - o When outputting to Excel, - Numeric and Currency formatting will be consistent with browser formatting.
 - o Financial statements will also be exported to Excel consistent with formatting displayed in the browser
 - Numeric and currency formatting
 - Indentation
 - Bolding
 - Underline and double underline
 - Hiding gridlines
- Report output is also **actionable** as you can see the blue 'linkable' text allowing you to navigate to that object to see further details. These linkable objects also have a related action icon next to them allowing you to directly take action on that object from the report output.

WICT RW Training Report 1 [...]						
338 items						
Worker	Hire Date	Active Status	Worker Type	Employee Type	Legal Name	Location
Abby Brennan [C]	01/04/2010	Yes	Contingent Worker		Abby Brennan	Chicago
Adam Carlton [A]						
Adrian Martin						
Adrian Martin [C] (Contract Ended)						
Aidan Mitzner						
Ajay Mokashi						
Alain DuBois						



Contact

Phone: +1 (617) 944-8659
(Telephone)

Email: acarlton@workday.net

Business Process

- Calendar
- Compensation
- Job Change
- Manage Work
- Organization
- Payment
- Payroll
- Payroll Interface
- Personal Data

Maintain Input

- Complete Federal Withholding Elections
- View Payee W-4 Withholding IRS Report
- External Payroll Actuals

Instant Messenger  acarlton

Report Definitions:

You also have options from the report definition to take action and manipulate the custom report definition:

- Export the report definition to excel or pdf.
- Use the related action icon to see available actions on the custom report
- Add Comments under Additional Info

The screenshot shows the 'View Custom Report' page for 'WICT RW Training Report 1'. On the left, there's a table with report details: Report Name (WICT RW Training Report 1), Report Type (Simple), Data Source (All Workers), Data Source Type (Standard), and Primary Business Object (Worker). Below this is an 'Additional Info' section with a table for columns, showing fields like 'Worker' and 'Hire Date'. A context menu is open over the report name, titled 'Available Actions'. It includes options like Edit, Run History, Change to Advanced Report Type, Copy, Maintain Excel Template, Run, Schedule, Test, Transfer Ownership, Translate, and Delete. Three specific icons are highlighted with orange boxes: a 'Print' icon at the top right of the main area, a 'Copy' icon in the 'Available Actions' menu, and a 'Delete' icon in the bottom right corner of the main area.

CLASS REPORT FIELDS

Each Data Source has many Class Report Fields (CRFs). Each CRF is accompanied by a field type icon. Fields can be **simple types** or **object types**. Their icons and their definitions are as follows.

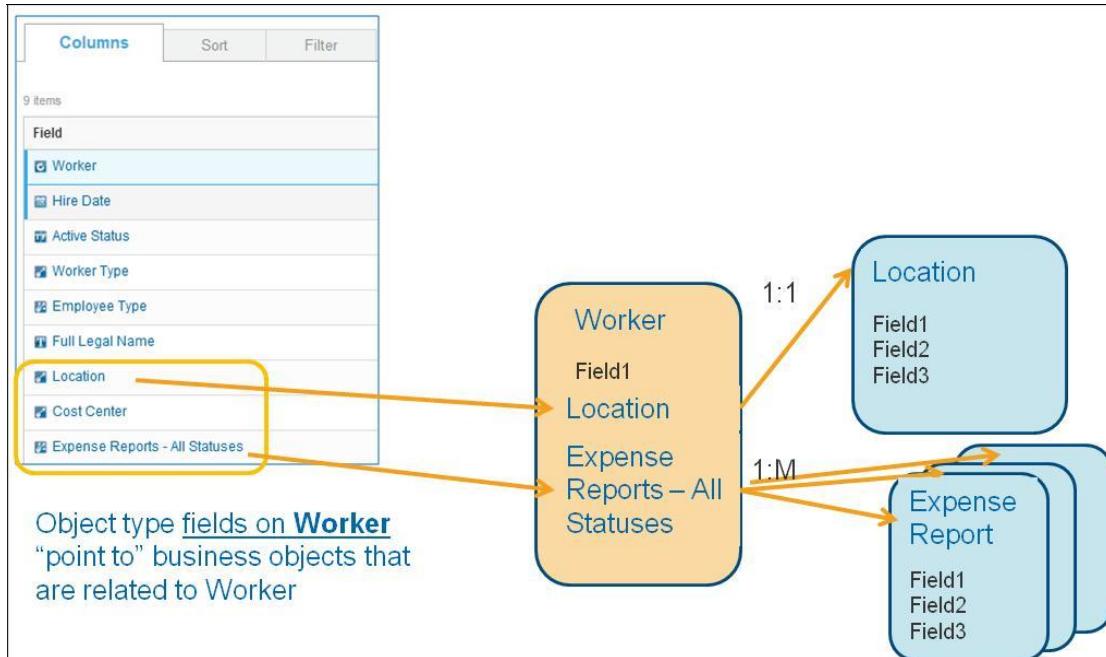
When creating custom reports, depending on your security, you can display, sort, filter and create prompts for not only Workday delivered report fields, but also for available Calculated Fields and/or Custom Fields.

Icon	Definition
	Primary Object: This icon represents the primary object from the report data source. This is also referred to as a self-referencing object.
	1:M Object: This icon represents a related object with a 1 to many relationship. It is also called a multi-instance field.
	1:1 Object: This icon represents a single instance related object *All objects are actionable and will be represented as a hyperlink and display a related action icon in the report output (unless security offsets). **An object's Instance ID will be passed through to the XML output once the report is published as a web service.
	Currency Field: This type of CRF represents a currency field.
	Boolean Field: This type of CRF represents a Boolean or True/False field.
	Date Field: This type of CRF represents a date field.
	Numeric Field: This type of CRF represents a numeric field.
	Text Field: This type of CRF represents a simple text field.

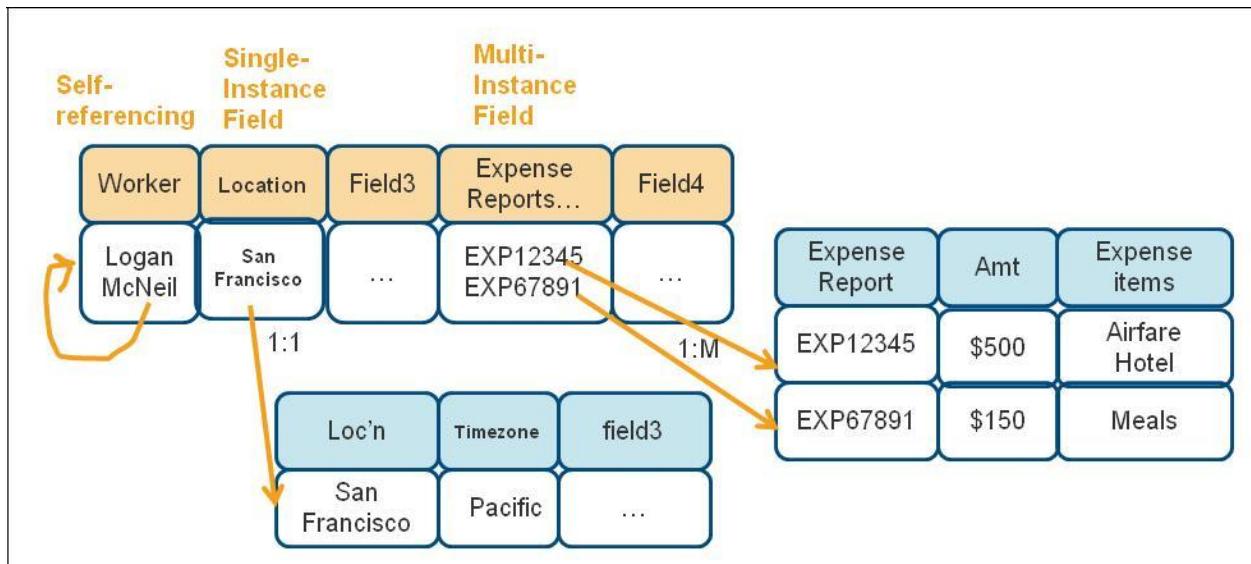
OBJECT TYPE FIELDS

Object type fields hold the relationship between 2 objects in either a 1:1 (one to one) single instance or 1:M (one to many) multi-instance relationship. In our activity example, we can see the Cost Center field on the Worker business object is a single instance field and the Expense Reports – All Statuses is a multi-

instance field. These 2 fields on the Worker business object 'link' the Worker business object to related business objects that hold the details of the cost center and expense reports, respectively.



Another way to demonstrate what single instance, multi-instance and even self-referencing field types ‘point to’ is the following representation. Here we are showing objects as “Tables” or spreadsheets. See how the values in a given self-referencing, single instance or multi-instance field *point to* an instance (or row) in a “Table” or object.

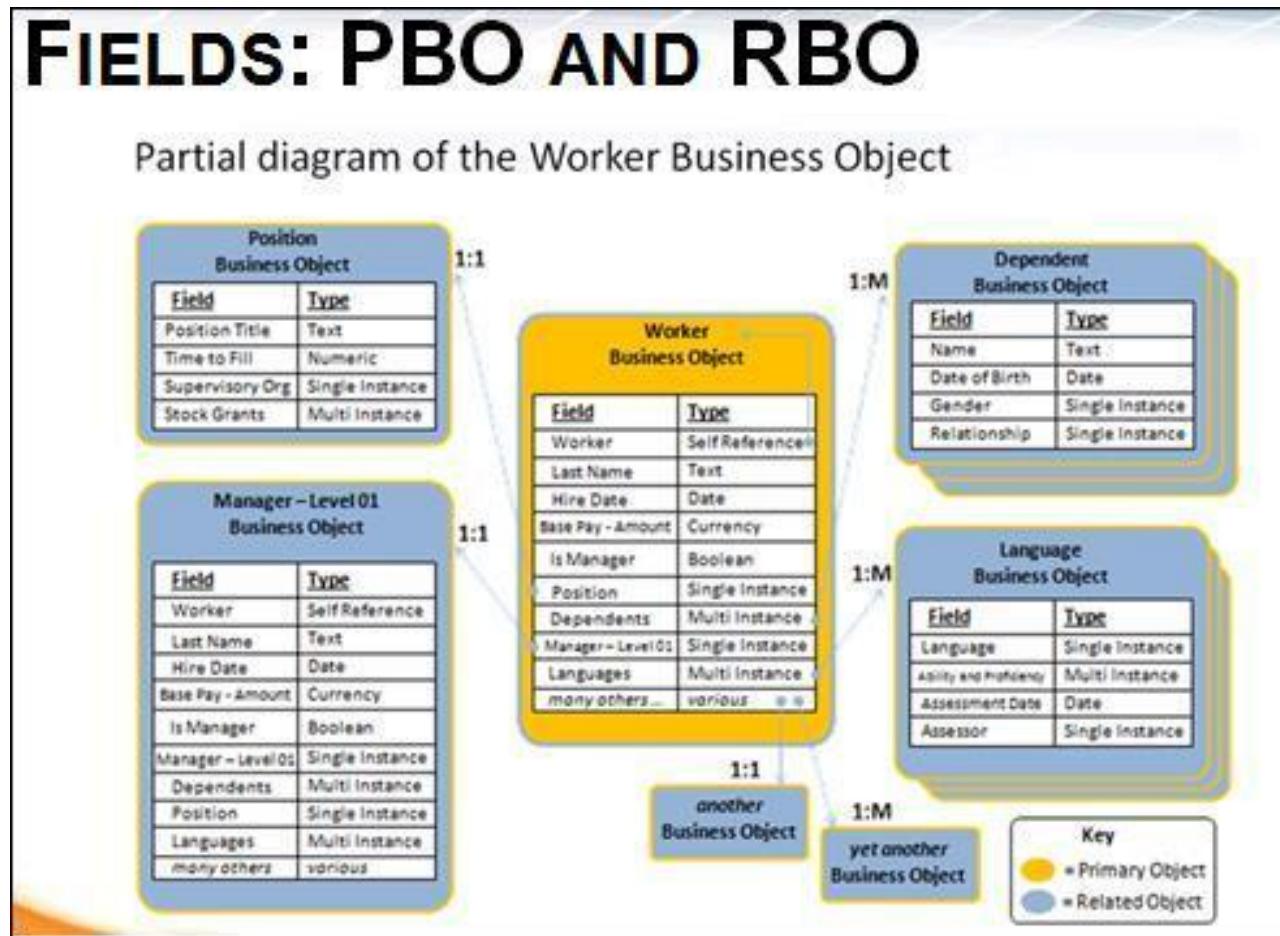


OBJECT RELATIONSHIPS

When writing reports in Workday, it is important to understand where the data you need is, i.e. on what business objects, and how these business objects are related.

Workday automatically manages the relationships between objects. When reporting in Workday it is important to know what fields are available on what business object and to understand the related business objects that link and link from one object to another.

Object type fields 'relate or point' one object to another in either a 1:1 or 1:M fashion.



REPORTING RESOURCES

Earlier we saw the **Business Objects by Category** report that showed the business objects for a given area of Workday. Let's take a closer look at business objects to better understand all the fields they contain as well as the relationships they hold with other objects.

BUSINESS OBJECT DETAILS REPORT

The **Business Object Details** report is a helpful resource that shows up to 4 tabs of valuable information:

1. **Available report fields** on the given business object
3. Relationships to **Related Business Objects** to and from that business object
4. **Data sources** available for that business object
5. **Reports** in the tenant that reference that business object

The Business Object Details report can help you understand and navigate the Workday object model. Knowing how business objects relate to each other and where they are used in data sources is invaluable when building reports and calculated fields.



Tip: Using the **bo:** search prefix, you can also see the business object details for a given object. Example, running *bo: organization* in the search box and then selecting the Organization object in the search results will return the business object details for the Organization business object.

1. The **Fields** tab

The first tab of the **Business Object Details** report shows all available delivered, calculated and custom fields for the given business object.



Tip: You can filter the list using the filter grid icon and searching, for example, for interested fields in the description column to find the Workday field name.

Business Object Details Expense Report Line ...							
Fields		Related Business Objects		Data Sources		Reports	
Fields 481 items							
Field Name	Description	Field Source	Field Type	Related Business Object	Built-in Prompts	Category	Authorized Usage
filter	credit card	filter	filter	filter	filter	filter	filter
Account Number for Expense Report Line	Corporate Credit Card Account as Worktag Credit card item (loaded or manual transaction) for expense report line. Payment amount for the credit card transaction Returns Credit Card Transaction for Expense Report Line					Account	Default Areas
Accounting Treatment	The account name for the corporate credit card. The account number for the corporate credit card. The credit card charge description for the expense report line.	ccounting treatment ...				Business Asset	Default Areas

2. The Related Business Objects tab

The second tab of the report shows information about the relationships of other objects to the given business object, both outgoing and incoming.

On the left hand side, you can see the list of business objects that your given object links to. "outgoing links".

In our example, we can see that the *Expense Report Line* business object links to the *Credit Card Transaction* business object. If we click on the link, we can see that there is a field on Expense Report Line that points to Credit Card Transaction. We can also see that this field is single instance, meaning that for a given expense report line, there can only be one credit card transaction for that expense.

The screenshot shows the 'Business Object Details' page for 'Expense Report Line'. At the top, there are tabs for 'Fields', 'Related Business Objects' (which is selected), 'Data Sources', and 'Reports'. Below the tabs, there are two sections: 'Links to Related Business Objects' and 'Links from Related Business Objects'. The 'Links to Related Business Objects' section lists 117 items, including 'Corporate Credit Card Account', 'Cost Center', 'Country', 'Credit Card Item', and 'Credit Card Transaction'. The 'Links from Related Business Objects' section shows a table with one row:

Business Object	Field	Related Business Object	Field Type	Category	Description
Expense Report Line	Expense Credit Card Transaction	Credit Card Transaction	Single instance	Credit Card	Returns Credit Card Transaction for Expense Report Line

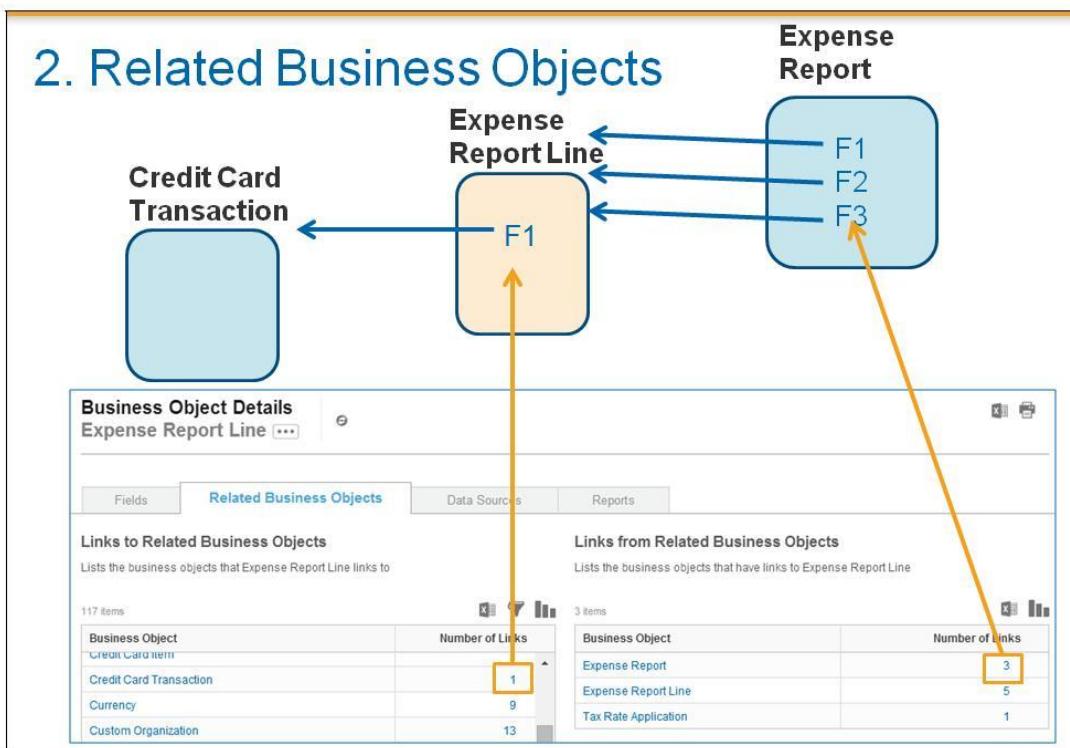
On the right hand-side, we can see a list of business objects that link to our given object, so 'incoming links'.

In our example, we can see that the *Expense Report* business object links to the *Expense Report Lines* business object via 3 fields. Also note how these fields are multi-instance, showing how one expense report can point to more than one expense report line.

The screenshot shows the 'Business Object Details' page for 'Expense Report'. The 'Related Business Objects' tab is selected. On the right, there is a table showing fields from the 'Expense Report' object that link to the 'Expense Report Lines' object. There are three such fields, all named 'Expense Report Lines' and all pointing to 'Expense Report Line' as the related business object. The first field is described as 'Multi-instance' and 'Reference', while the others are 'Multi-instance' and 'Reference'. The descriptions for these fields mention that they allow drilling into expense report lines and detail lines.

Business Object	Field	Related Business Object	Field Type	Category	Description
Expense Report	Expense Report Lines	Expense Report Line	Multi-instance	Reference	This field allows you to drill into the details of each Expense Report Line on an Expense Report and access related actions. The expense lines are from the following types of expense report lines: - Expense Report Lines not itemized and - Summary Lines (Lines that were itemized but not the Detail Lines themselves)
Expense Report	Expense Report Lines	Expense Report Line	Multi-instance	Reference	This field allows you to drill into the details of each non-itemized Expense Report Line and Detail Lines that

2. Related Business Objects



3. The Data Sources tab

The third tab of the Business Object Details report shows available data sources for reporting on the given object. This tab will show data sources, and even more general or more specific data sources for a complete list of options.



Tip: If you don't see a Data Sources tab for a given object, then there is no delivered data source for reporting on that object as the Primary Business Object and you cannot build a custom report using that PBO. Consider related business objects to see if you can get to the data otherwise.

Business Object Details
Expense Report Line ...

Fields Related Business Objects Data Sources Reports

2 items

Data Source	Description	Primary Business Object	Category
Expense Report Lines	Access the Expense Report Line as its primary object. Prompts user at run time for Company/Company Hierarchy. Returns all Expense Report Lines which match the criteria. Expense Report Lines included are Expense Report Lines not itemized and Summary Lines (Lines that were itemized but not the Detail Lines themselves).	Expense Report Line	Expenses
Expense Report Lines for Worker	Accesses the expense report line as its primary object. The expense report line object returns one row for every non-summary expense report line and itemized line that is part of the expense report for the worker. Includes expense report lines that are for workers who are supported by the processing worker in some role. Prompts the user at run-time for Roles to automatically filter the report results.	Expense Report Line	Expenses

More General Data Sources
More Specific Data Sources

4. The **Reports** tab

The fourth tab of the Business Object Details report will show if there are reports in the tenant (both Standard and Custom) that use the given business object. This can serve as a great reference and can provide great '**examples**' to leverage when studying a given business object and wanting to write reports against the given object.

Business Object Details

Expense Report Line [...](#)

Fields	Related Business Objects	Data Sources	Reports																		
<ul style="list-style-type: none"> Standard Reports Custom Reports <p>5 items</p> <table border="1"> <thead> <tr> <th>Custom Report</th> <th>Workday Account</th> <th>Data Source</th> </tr> </thead> <tbody> <tr> <td>Average Cost of Meal per Attendee</td> <td>tserrano / Teresa Serrano</td> <td>Expense Report Lines</td> </tr> <tr> <td>Expense Reports Nested</td> <td>tserrano / Teresa Serrano</td> <td>Expense Report Lines</td> </tr> <tr> <td>Guests on Expense Reports</td> <td>tserrano / Teresa Serrano</td> <td>Expense Report Lines</td> </tr> <tr> <td>Non-Preferred Airline Expense by Worker</td> <td>tserrano / Teresa Serrano</td> <td>Expense Report Lines</td> </tr> <tr> <td>Where are workers traveling ?</td> <td>tserrano / Teresa Serrano</td> <td>Expense Report Lines</td> </tr> </tbody> </table>				Custom Report	Workday Account	Data Source	Average Cost of Meal per Attendee	tserrano / Teresa Serrano	Expense Report Lines	Expense Reports Nested	tserrano / Teresa Serrano	Expense Report Lines	Guests on Expense Reports	tserrano / Teresa Serrano	Expense Report Lines	Non-Preferred Airline Expense by Worker	tserrano / Teresa Serrano	Expense Report Lines	Where are workers traveling ?	tserrano / Teresa Serrano	Expense Report Lines
Custom Report	Workday Account	Data Source																			
Average Cost of Meal per Attendee	tserrano / Teresa Serrano	Expense Report Lines																			
Expense Reports Nested	tserrano / Teresa Serrano	Expense Report Lines																			
Guests on Expense Reports	tserrano / Teresa Serrano	Expense Report Lines																			
Non-Preferred Airline Expense by Worker	tserrano / Teresa Serrano	Expense Report Lines																			
Where are workers traveling ?	tserrano / Teresa Serrano	Expense Report Lines																			

Reports Displaying Business Object at Second Level

REPORT FIELDS

The **Report Fields** report can be run from the search window and will display all fields available for use in Report Writer. This can be a helpful resource if you are not sure what objects given fields are on. This report is a LARGE report given it lists all delivered, calculated and custom fields in the tenant.

Report Fields [...](#)

19581 items

Field	Business Object Name	Description	Field Source	Report Field Type	Related Business Object	Built-in Prompts	Category	Auth
filter	filter	filter	filter	filter	filter	filter	filter	filter
No matches found	Global	Returns Dash Character '-'	Workday Delivered	Text			Uncategorized	filter
,	Global		Calculated	Text			Uncategorized	filter
:	Global	Returns Comma Character ','	Workday Delivered	Text			Uncategorized	filter
:	Global	Returns Colon Character ':'	Workday Delivered	Text			Uncategorized	filter
/	Global	Returns Forward Slash Character '/'	Workday Delivered	Text			Uncategorized	filter
.	Global	Returns Period Character '.'	Workday Delivered	Text			Uncategorized	filter



WALKTHROUGH/HOMEWORK

Use Business Object Details report to understand relationship between objects.

TASK 1- A Closer look at Business objects!

1. From the search box, run the **Business Object Details** report
2. Enter “Dependent” as the business object.
3. Using the report, answer the following questions:

A worksheet has been provided in the back of the guide, along with the solution.

- a. Can you report on a dependent’s *Gender, Age, Relationship?* Do the report fields exist? _____
 - b. Does the **Dependent business object link to** the Worker business object? _____
 - i. If so, via what field(s)? _____
 - ii. If so, can there only be one worker for each dependent or more than one? _____
 - c. Does the *Organization* business object **link to the Dependent business object?** _____
 - i. If so, via what field(s)? _____
 - ii. If so, can there only be one dependent for each organization or more than one? _____
 - d. Does the *Benefit Election* business object **link to the Dependent business object?** _____
 - i. If so, via what field(s)? _____
 - ii. If so, can there only be one dependent for each Benefit Election or more than one? _____
 - e. What data sources are available to report on Dependent as the PBO of a report?
 - f. What reports exist in the tenant where Dependent is the PBO?
 - i. What about reports in the tenant where Dependent is used as a related business object?
4. Run the **Business Object Details** report for business objects you are interested in!

TASK 2 - Run the **Business Objects by Category** report.

Run the **Business Objects by Category** report. Select a category you are interested in to see objects in that category. Remember that categories included for this report are 'Search categories'. Click on a given object to see the details of the given business object.

TASK 3 - Report Fields

1. From the search box, run *Report Fields*
2. Use this report to search (filter) on a given field to see what business object(s) it's on. Once you hone in a business object, you can then study the business object closer with the Business Object Details report.

Tips:

- Filter on Category for an area of interest.
- Export output to excel to more easily filter/search/sort.

Report Fields ...									
21402 items									
Field	Business Object Name	Description	Field Source	Report Field Type	Related Business Object	Built-in Prompts	Category	Authorized Usage	
filter	filter	filter	filter	filter	filter	filter	account	filter	
filter -	Global	Returns Dash Character '-'	Workday Delivered	Text	Account Bank Account				Default Areas
filter _	Global		Calculated	Text	Corporate Credit Card Account External Account Provisioning				Default Areas
filter ,	Global	Returns Comma Character ','	Workday Delivered	Text	Workday Account				Default Areas
filter :	Global	Returns Colon Character ':'	Workday Delivered	Text			Uncategorized		Default Areas
filter /	Global	Returns Forward Slash Character '/'	Workday Delivered	Text			Uncategorized		Default Areas

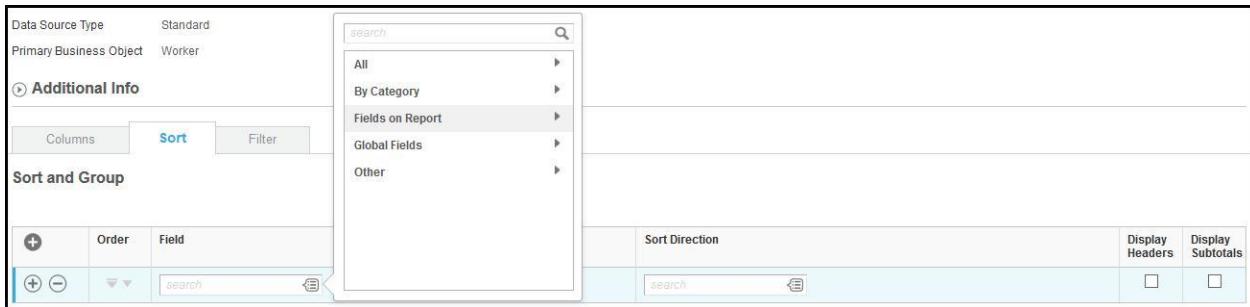
(End of Walkthrough)

SORTING AND FILTERING REPORT FIELDS

SORTING

The **Sort** tab on the report definition allows you to control the order in which data will be presented and grouped. This step is optional. If no sort/group criteria are specified, the report will sort the data based on the first (leftmost) column that is associated with the primary business object and the data will not be grouped or totaled.

If you specify a sort/group field, the values of that field will determine the order of the rows in your report. You can select additional sort/group fields to specify additional levels of sorting you want for the report. The first sort/group field determines the highest level sort and the last sort/group field determines the lowest level sort.



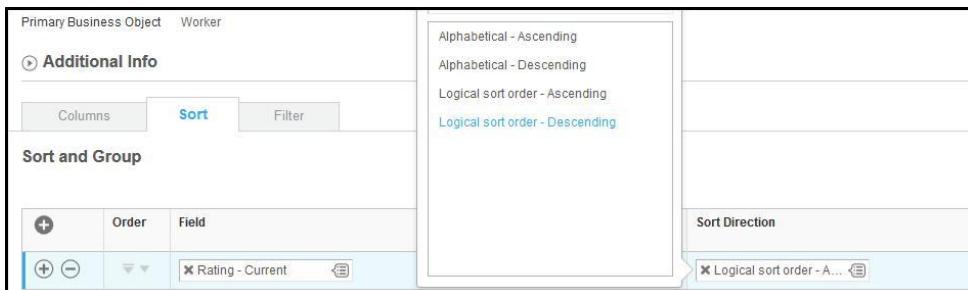
You can select any field or object on the primary Business object to sort by. The fields selected in the sort are not required to be on the report output (Columns tab).



Tip: Sorting on text fields performs better than sorting on single instance fields.

LOGICAL SORT ORDER

When it comes to sorting on fields, you are typically presented with the option to sort alphabetically in ascending or descending order. Some fields, such as accounting period represented by months, have a natural sort order that we are familiar with, like January, February, March, etc. To help you avoid adding numerical prefixes to the values, like 01-January, 02-February, 03-March, to reflect the natural order of these fields, **Workday provides for logical sorting**. You will see the option to sort based on Logical Sort order for fields enabled for logical sort.



FILTERING

The Filter tab on the report definition allows you to specify how you want to filter the primary business objects for the report beyond your data source. This step is optional. If no filter criteria are specified for a report, all instances from the data source will be included in the report. Otherwise, only instances that satisfy the filter criteria will appear on the report. A filter consists of one or more filter conditions, defined as rows in the filter grid. You can select from Fields on Report, or from any field on the Primary Business object or from Global Fields.

The screenshot shows the 'Filter' tab in the Report Writer interface. It displays a list of filter categories on the left: All, By Category, Fields on Report, Global Fields, and Other. On the right, there is a table for defining filter conditions. The first condition is 'Employee Type' with the operator 'any in the selection list' and the value 'Regular'. The second condition is 'Hire Date' with the operator 'greater than or equal to' and the value '01/01/2008'.

FILTER OPERATORS

Depending on the field type, your filter operators will vary to allow for different checks and evaluations when defining your report filter.

For example when filtering on a date field (Simple Type Field), you can choose greater than, less than, and not equal to, while if filtering on an object type field like Employee Type, you can compare to a selection list of choices, or subsets or exact matches.

The screenshot shows the 'Filter' tab with the 'Employee Type' condition expanded. A dropdown menu lists various operators: 'exact match with the selection list', 'NOT exact match with the selection list', 'subset of the selection list', 'NOT subset of the selection list', 'superset of the selection list', 'NOT superset of the selection list', 'count is equal to', and 'count is not equal to'. The 'any in the selection list' operator is currently selected.



Tip: the order of your filter conditions matters and can impact your report's performance. Place conditions that filter out the most instances first.



ACTIVITY 4 – ADD A FILTER AND SORT TO THE REPORT

Business Case: Logan McNeil now understands why some workers are missing some fields, and she is ready to complete this report by adding a filter on the hire date and sorting the report by Location and Age Group.

TASK 1 – CHECK DATA SOURCE

1. Search for your report using the **rd:** prefix. Enter **rd: WICT RW Training** in the search box to find your custom report definition.

Use related actions off the report definition to edit your report.

The screenshot shows a search results page for 'rd: wict rw trainin'. There are two items listed: 'Tasks and Reports' and 'WICT RW Training Report 1'. The 'WICT RW Training Report 1' item has a context menu open, listing options such as Custom Report, Audits, Favorite, Integration IDs, Layout, Process, Reporting, Solution, Translation, Web Service, Edit, Run History, Change to Advanced Report Type, Copy, Maintain Excel Template, Run, Schedule, Test, Transfer Ownership, Translate, and Delete.

2. Make sure the Data Source is “**All Workers**” for our training purposes.
3. Click OK to save and run the report. See how all workers, both contingent workers and employees are being returned, along with active vs. inactive workers. Also see how the report output is sorted by the first column on the report: Worker.

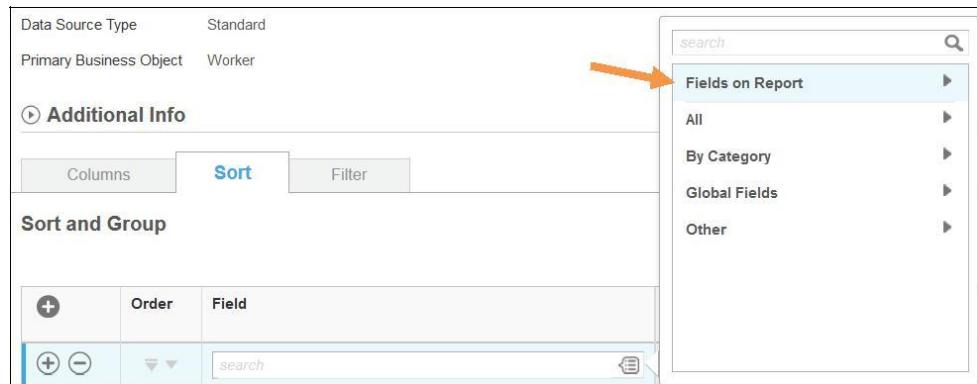
TASK 2 – SORT WORKERS BY LOCATION & AGE GROUP

1. Go back to **edit** the report. This time, let’s add the **Age Group** field to the report. Under the **Columns** tab in your report definition, add the **Age Group** report field.

The screenshot shows the 'Columns' tab of a report definition. It lists eight columns: 'Order' and 'Field'. The 'Field' column contains 'Worker' and 'Age Group'. The 'Age Group' row is highlighted with an orange border.

Report Writer for Workday

2. While still in edit mode, go to the **Sort tab**, and let's **sort** the report results by **Location** and by **Age Group**. Age Group is a field enabled for logical sorting by Workday.
 - a. As you pick fields under the Sort tab, the prompt will allow you to select fields that are on your report "Fields on Report" or you can also select from any field on your report's Primary Business Object (e.g. by Category). Since our sort fields are on our report, we can use the *Fields on Report* prompt option to easily select them.



- b. **Add rows** to configure the sort as follows.

Field Name	Sort Direction
Location	Alphabetical – Ascending
Age Group	Logical Sort Order – Descending

Columns	Sort	Filter								
Sort and Group										
2 items										
				Sort Direction	Display Headers	Display Subtotals				
(+)	Order	Field		Alphabetical - Ascending	<input type="checkbox"/>	<input type="checkbox"/>				
(+/-)	▼ ▼	Location		Logical sort order - Descending	<input type="checkbox"/>	<input type="checkbox"/>				
(+/-)	▲ ▲	Age Group								

3. Click OK to save and Run the report and notice the sort order of the results.

TASK 3 – FILTER REPORT BY HIRE DATE & EMPLOYEE TYPE

1. Once again **edit** the report, this time adding a **Filter** for the Hire Date
 - a. Go to the **Filter Tab**.
 - b. Similar to the sort tab, you can select fields from the prompt, searching by "Fields on Report" or any fields you have access to from your report's Primary Business Object.
 - c. Click the icon to **add a row** into the filter and populate the fields as follows:

Field Name	Entry Value
Field	Hire Date
Operator	Frequently Used > Greater than or equal to
Comparison Value	01/01/2008

2. Click OK to save and run the report and notice that fewer instances appear, due to the filter.
3. Go back to edit the report and now let's add another filter, this time filtering on the "**Employee Type**" field. We want to only show "regular" employees, and remove all temporary, seasonal employees by filtering on Employee Type. Notice you can change the prompt from "Fields on Report" to "By Category>Employment" or simply search for Employee Type by field name.

The screenshot shows the 'Additional Info' dialog box. On the left, there is a 'Filter' section with an 'And' operator selected. Below it, there is a table with two rows: one for 'Field' and one for 'Employee Type'. On the right, a list of fields is displayed under the heading 'By Category > Employment', including 'Employee Type' which is highlighted.

4. Along with the Hire Date filter, also **add a row** to filter on the **Employee Type** as shown:

Field Name	Entry Value
Field	Employee Type
Operator	Frequently Used > Any in the selection list
Comparison Value	Regular

Report Writer for Workday



The screenshot shows the 'Filter' tab of the Report Writer interface. It displays a table with two rows of filter conditions:

*Field	*Operator	Comparison Value
Employee Type	any in the selection list	Regular
Hire Date	greater than or equal to	01/01/2008

- Click OK to save and Run the report and notice how many Workers are returned in the results.

Question: Does the order of your filter conditions matter?

Answer: Yes, consider which will reduce the # of instances the most, the hire date condition or the employee type. Place the condition that rules out the most # of instances first.

Question: Our report started with the *All Workers* data source and we then filtered all workers down to just regular employees. Is there a better data source to choose?

Answer: Yes – data sources targeted just for employees (e.g. All Active Employees or Employees by Organization) would at least have left out terminated or contingent workers from the start, to reduce the number of instances to be processed in the report.

TASK 4 – EXPORT YOUR REPORT DEFINITION TO PDF ON YOUR DESKTOP

- From the search box, run the **View Custom Report** task.



- When viewing (not editing) a custom report definition, you can export the definition to Excel or Pdf on your desktop. Click on the pdf or excel icon in the upper right to export the definition.



- Open the downloaded pdf or excel file to see the report definition details.

(End of Activity)

SIMPLE VS. ADVANCED REPORT TYPES

As we have seen, Simple Report Types have limited options for basic reports. There are a number of reasons why a report may need to be converted from the Simple to Advanced report type.

Type	Reasons
SIMPLE REPORT	No Sharing with Other Users Simple Filters Cannot publish as Web Service No Related Business Object fields
ADVANCED REPORT	Can Share with Other Users Complex Filters – Prompting Publish as a Web Service Access to Related Business Object fields (child tables) Filtering on Related Business Objects

You can create custom reports as an Advanced report type from the start, however, if you started with a Simple report type, there is an option to convert the report from simple to advanced. Using the related actions on your report definition, select **Custom Report > Change to Advanced Report Type**.



ADVANCED FILTERING OPTIONS AND PROMPTS

With Advanced report types, you have greater filtering options than with Simple report types. Advanced filtering options include the ability to use **Comparison Types**, including the option for prompts or comparing to another field.

COMPARISON TYPES

Filter Comparison Types include 4 options:

1. **Prompt the user for the value** – With this option, the prompt value is required for filtering and whatever value is entered will be used to filter the report. You can think of it as a “hard prompt”.
 - a. So for example, if prompting the user for a hire date and the value is left blank, the report will try to match hire dates with ‘blank’. The blank value will be used in the filtering.
2. **Prompt the user for the value and ignore the filter condition if the value is blank** – This option configures an optional or “soft prompt”, so if nothing is entered at the prompt (i.e. blank value), the report will ignore the filter condition. The report will only use the value to filter on if not blank.
 - a. So in our example, if the hire date prompt is left blank, the report will not filter on that field and will ignore the condition, returning all dates.
3. **Value from another field** – This option allows you to compare the value of one field to another.
4. **Value specified in this filter** – This option allows you to explicitly specify a value to filter on.

The screenshot shows the 'Filter' tab of the Workday Report Writer interface. On the left, there's a table for defining filter conditions. The first condition is set to 'And' and compares the 'Hire Date' field to the value 'Employee Type'. The second condition is also set to 'And' and compares the 'Employee Type' field to the value 'any in the selection list'. A tooltip on the right provides details about each comparison type:

- Prompt the user for the value**: Prompt the user for the value and ignore the filter condition if the value is blank.
- Value from another field**: Value specified in this filter.
- Comparison Type**: Value specified in this filter.
- Value specified in this filter**: Value specified in this filter.

FILTER TAB

When prompting the user for a value to filter instances of your custom report, you can use delivered prompt qualifiers for the comparison value.

Order	And/Or	(*Field	*Operator	Comparison Type	Comparison Value
▼ ▾	And		Hire Date	greater than or equal to	Prompt the user for the value	Starting Prompt
▲ ▾	And		Hire Date	less than or equal to	Prompt the user for the value	Ending Prompt
▲ ▲	And		Employee Type	any in the selection list	Prompt the user for the ...	Default Prompt

PROMPTS TAB

If your custom report has prompts defined under the Filter tab, or prompts built-in to the data source or report fields, you can configure **prompt defaults** and **prompt instructions** under the **Prompts** tab.

Here you can specify prompt instructions, the sequence the prompt fields should be displayed in, overrides for the prompt labels, default values and more. You can specify prompt defaults for both built-in and user-defined prompts.

Order	*Field	Prompt Qualifier	Label for Prompt	*Default Type	Default Value
▼ ▾	Hire Date	Starting Prompt	START	Specify default value	01/01/2008
▲ ▾	Hire Date	Ending Prompt	END	Determine default value at runtime	Today
▲ ▲	Employee Type	Default Prompt	Employee type (Optional)	No default value	

POPULATE UNDEFINED PROMPT DEFAULTS

The checkbox *Populate undefined Prompt Defaults* can be a useful option when your report has many prompt fields that require default values. Instead of manually adding each prompt field, you can select this checkbox, and all the fields will get added automatically. You can then more easily go through and specify needed default configurations.

This checkbox is especially useful with financials data sources that include many built-in prompt fields so that you can easily set prompt defaults without having to add each prompt field in manually.

In this example, the prompt fields are all built-in to the report's data source.

When you click on the checkbox it will populate all the report's prompt fields in the Prompt Defaults section below and the checkbox will then reset to blank. This saves the user from adding each prompt field manually.

Prompt Defaults 8 items			
	Order	Field	Prompt Qualifier
<input type="checkbox"/>	▼ ▲	Company	No default value
<input type="checkbox"/>	▲ ▼	Organization	No default value
<input type="checkbox"/>	▲ ▼	Year	No default value
<input type="checkbox"/>	▲ ▼	Book	No default value
<input type="checkbox"/>	▲ ▼	Journal Status	No default value
<input type="checkbox"/>	▲ ▼		
<input type="checkbox"/>	▲ ▼		

DISPLAY PROMPT VALUES IN SUBTITLE

For custom reports that include prompts, you can choose to display the prompt values in the report output or not. You can configure to not show the prompt values at all, or to display all or certain ones.

Subtitle Area of report output

You can configure your custom report to show prompt values in the report output (in the subtitle area) or to not show all or certain ones to not show, if you want to save the space.

Worker	Hire Date	Location	Time Zone	Supervisory Organization	Cost Center	Expense Reports - All Statuses	Expense Report	Expense Reports - All Statuses	Expense Items on Expense Report
Yolanda Torres	02/01/2008	Chicago	Central Time (Chicago)	HR Operations Americas Group	41500 HR Operations	Expense Report: EXP-00003386 Expense Report: EXP-00003434 Expense Report: EXP-00003485	Expense Report: EXP-00003485	1,353.95	Airfare Hotel Accommodations Meals Parking

Populate undefined Prompt Defaults

Select checkbox if you want Prompt values to be displayed in subtitle area of report output

Display Prompt Values in Subtitle

Prompt Defaults 3 items

	Prompt Qualifier	Label for Prompt	Required	Do Not Prompt at Runtime	Do Not Include in Subtitle
<input type="checkbox"/> <input style="width: 15px; height: 15px; vertical-align: middle;" type="button" value="..."/>	Starting Prompt	Sue's Hire date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Ending Prompt	END hire date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Default Prompt	Employee type (Optional)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		No default value			

If displaying prompt values in subtitle,
select individual prompt fields to **not**
include in subtitle

SAVING PROMPT FILTERS WHEN RUNNING REPORTS

Custom report definitions can be enabled to allow you to save report filters (prompt values) when running the report. This feature can be time-saving especially when working with financial reports requiring many input parameters.

This option allows each user to save his or her entered parameters for the prompt values and re-use, recall them each time they run the report.

Instructions Please enter a hire date range.
If employee type left blank, all employee types will be returned.

Starting Hire Date

Ending Hire Date

Employee Type (Optional):

3 Saved Filters

2009 Regular Employee Hir...
2010 Regular Employee Hir...
2011 Regular Employee Hires

To enable saving of prompt filter parameters for a given report, you need to enable the option in the report definition under the **Advanced Tab> View options> Enable Save Parameters:**

Specify advanced options for the report

View Options

Freeze First Column
Enable Preferred Currency
Enable Save Parameters

Report Writer for Workday

You must enable save parameters if using a report in a report group.

Once enabled, each user running the report will be able to save and manage his/her own saved prompt filters. **Manage Filters** allows users to edit or delete their saved filters for the given report.

Manage My Saved Filters			
3 items			
Report	Saved Filter		
WICT RW New Hire Report	2009 Regular Employee Hires	Edit	Delete
WICT RW New Hire Report	2010 Regular Employee Hires	Edit	Delete
WICT RW New Hire Report	2011 Regular Employee Hires	Edit	Delete



Note that **Saved Filters** are visible only for the given report and only for the user who created them, so they cannot be shared between users or across reports.



ACTIVITY 5 – CHANGE TO ADVANCED REPORT TYPE AND CONFIGURE FILTERS THAT PROMPT USER

Business Case: Logan McNeil has been asked to modify the report to include a prompt. The report should prompt the user when it is run for a date range. That date range should be used to “filter” against the hire date field. To implement these report writer features the report must be converted from a simple report to an advanced report.

TASK 1 - CHANGE TO ADVANCED TYPE

1. If not already looking at your custom report, search for your report definition by searching *rd: WICT RW Training*
2. Use the Related Action icon next to the custom report object definition to initiate the **Custom Report > Change to Advanced Report Type** action.
3. Click the **OK** button to save the change.
4. Click on the **Done** button once your change is confirmed.

TASK 2 - ADD FILTER THAT PROMPTS THE USER FOR A VALUE “HARD PROMPTS”

1. Go back into **Edit** mode for your now Advanced report type.
2. Activate the **Filter** tab.
3. Delete the existing filters for Hire Date and Employee type.
4. Add a new filter row by clicking icon.
5. Add a filter with the following values:

Field Name	Entry Value
Field	Hire Date
Operator	Frequently Used > Greater than or equal to
Comparison Type	Common > Prompt the user for the value
Comparison Value	Starting Prompt

6. Add another filter row by clicking icon.

- Add a filter with the following values:

Field Name	Entry Value
Field	Hire Date
Operator	Frequently Used > Less than or equal to
Comparison Type	Common > Prompt the user for the value
Comparison Value	Ending Prompt

- Click OK to save your report and Run.
- Leave the date prompt fields blank and click OK.
 - No results are returned. Why? Since we chose a Comparison Type of "Prompt the User for the value", this is a 'hard prompt', so the report will use the 'blank date' value to filter the report. There are no workers with hire dates greater than or equal to blank date and less than or equal to blank date.
 - Is there a way to make sure data is entered, i.e. not left blank? Yes, we will configure prompt defaults in the next task.

- Click on the  icon next to the report name to re-run the report with different report prompt parameters.

WICT RW Training Report 1  

- This time enter the dates of *01/01/2007* and *today's date*, and click OK.

- Note results are now returned.

TASK 3 - CONFIGURE DEFAULTS FOR YOUR FILTER PROMPTS AND RUN REPORT

- Go back into edit mode for your report. *You can either use related actions off your custom report object (Custom Report > Edit) or use the **Edit Custom Report** task from the search box and enter your custom report name)*



1. In Edit mode, go to the **Prompts** tab.
2. Insert a row under **Prompts Defaults** and enter the following values.

Let's ensure a date range is entered for the starting and ending hire dates by making it required for data entry, and let's also configure default values too.

Field Name	Entry Value
Field	Hire Date
Prompt Qualifier	Starting Prompt
Label for Prompt	Start
Default Type	Specify Default value
Default Value	01/01/2008
Required	Yes (checked box)

3. Insert another row under Prompts Defaults and enter the following values:

Field Name	Entry Value
Field	Hire Date
Prompt Qualifier	Ending Prompt
Label for Prompt	End
Default Type	Determine default value at runtime
Default Value	Today (Hint: Find under Global Fields)
Required	Yes (checked box)

4. Save the report by clicking **OK** and run the report.
5. See how you now have default values populated in the hire date fields and you can't leave those fields blank anymore. They show as required for input.
6. Run the report with a hire date range of choice.

TASK 4 - CONFIGURE AN OPTIONAL OR "SOFT" PROMPT

1. Go back into **edit** mode for your report definition.

2. Under the **Filter** tab, let's **add another filter condition**. This time, using the comparison type of "Prompt the user for a value and ignore the filter condition if the value is blank".

Field Name	Entry Value
Field	Employee Type
Operator	Frequently used > In the selection list
Comparison Type	All > Prompt the user for a value and ignore the filter condition if the value is blank <ul style="list-style-type: none"> • Note you can find this option under "All" in the prompt (not Common).
Comparison Value	Default Prompt

3. Still in edit mode, under the **Prompts** tab, enter Prompt Instructions: *Please enter employee types to return. If left blank, all employee types will be returned.*
4. Click on the checkbox: *Populate undefined Prompt Defaults*. (This checkbox will populate any undefined prompt fields under the Prompt Defaults section and then will reset.)
5. See how your newly added *Employee Type* filter condition gets added to the Prompt defaults section. This checkbox can help you ensure that you have configured needed defaults for all defined filter conditions that involve prompting the user for a value.
6. Configure the Employee Type prompt default as follows:

Field Name	Entry Value
Field	Employee Type
Prompt Qualifier	Valid Values > Default Prompt
Label	Employee Type (Optional)
Default Type	No Default Value

Prompt Instructions

Instructions: Please enter employee types to return. If left blank, all employee types will be returned.

Runtime Date Prompts

Effective Date	* Use date and time at runtime
Entry Date	* Use date and time at runtime

Populate undefined Prompt Defaults

Display Prompt Values in Subtitle

Prompt Defaults 3 items

Order	*Field	Prompt Qualifier	Label for Prompt	*Default Type	Default Value	Required
1	Hire Date	Starting Prompt	Start	Specify default value	01/01/2008	<input checked="" type="checkbox"/>
2	Hire Date	Ending Prompt	End	Determine default value at runtime	Today	<input checked="" type="checkbox"/>
3	Employee Type	Default Prompt	Employee type (Optional)	No default value		<input type="checkbox"/>

Note: Remember that you can change the order of your prompt fields under the Prompt defaults section using the order arrows.

7. Click **Ok** to save and run the report.
8. Leave the *Employee Type* blank, and enter 01/01/2008 – 12/31/2008 for the start/end dates to see how all employee types will be returned. Employee type is an optional or “soft” prompt, so if left blank, the filter condition will be ignored and all employee type values will be returned.
9. Also see how in your report output, prompt values show in the report output title area. Since Employee type was left blank, there is no value to show.

TASK 5 -SAVE YOUR PROMPT FILTERS

1. Let's go back and do one more edit configuration for our custom report.
2. Edit your Custom Report and Activate the **Advanced** tab
3. Under View Options, activate the **Enable Save Parameters** option by checking the box.
4. Save the report by clicking **OK** and **Run** the report
5. Enter the dates of *01/01/2008* and *12/31/2008* and select *Regular* for employee type. This time save your parameters as “*2008 Regular Employee Hires*” in the saved filter box and click **Save**.

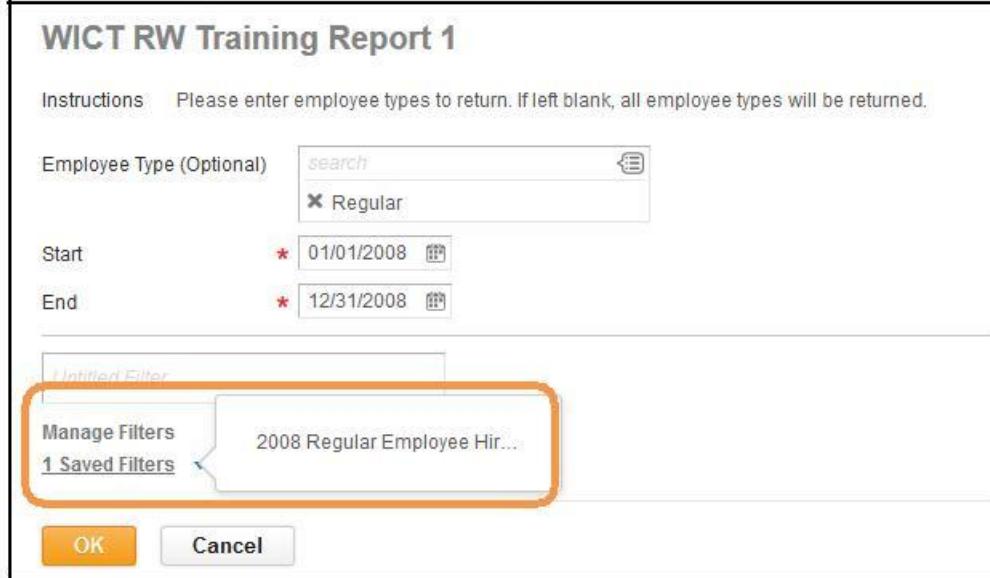
WICT RW Training Report 1

Instructions Please enter employee types to return. If left blank, all employee types will be returned.

Employee Type (Optional)

Start *

End *



6. Once you've saved your filter, change the report Start and End dates, enter: *01/01/2011 and today's date* and run the report.
7. Click on the  icon to go back to your report prompt parameters.
8. Now try running your report again this time using your saved filter "2008 Regular Employee Hires". See how the parameters get loaded in.

(End of Activity)

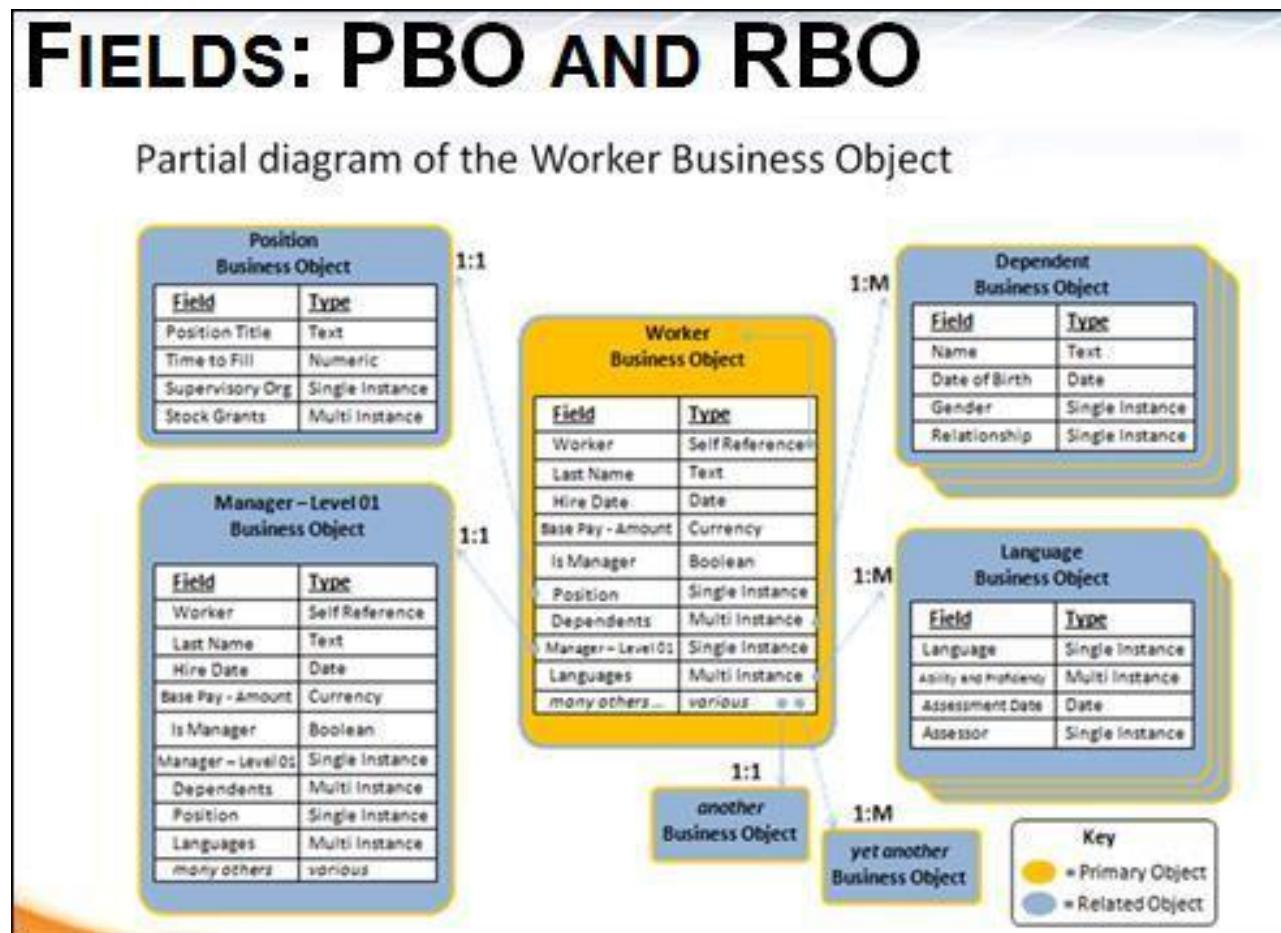
ACCESSING FIELDS FROM RELATED BUSINESS OBJECTS

BUSINESS OBJECT FIELDS

In addition to text, date, currency, numeric and Boolean type fields, a primary business object can include one or more fields that represent references or 'links' to *related business objects*. There are two types of fields that describe the relationship a related business object has to the primary business object. They are **single instance and multi-instance field types**.

Single instance fields on the PBO have a one-to-one (**1:1**) relationship between the primary business object and the related business object (for example, an invoice is associated with only one customer). Multi-instance fields have a one-to-many relationship (**1:M**) between the primary business object and the related business object (for example, an employee can have many accomplishments).

When working with Workday custom reports, you can access fields from the PBO and RBOs based on your data source and report field security. You can access fields from RBOs that are directly related to the PBO. You cannot access fields from RBOs related to RBOs that are further levels deep.



Report Writer for Workday

When configuring an Advanced report, you can include fields from the PBO and RBOs by specifying the **Business Object** and **Field** information under the **Columns tab**. A given Custom Report Definition can include fields from more than one RBO as shown below. You can only access related business objects (RBOs) that are directly off your Primary Business Object, so only 'one-level deep'.

Tip: The Business Object prompt will show you the **Primary Business Object**.

The screenshot shows the 'Columns' tab in the Report Writer. At the top, it displays 'Data Source: All Workers', 'Data Source Type: Standard', and 'Primary Business Object: Worker'. Below this, the 'Additional Info' section is expanded, showing a table with columns for 'Order' and '*Business Object'. One row is selected with the value 'Worker'. To the right of the table is a context menu titled 'Primary Business Object' with options like 'By Category', 'All', 'Global Fields', 'Other', 'Create', and 'Search'. The 'Primary Business Object' option is highlighted.

You can then change the Business Object to then access fields from other objects.

The screenshot shows the 'Columns' tab with 14 items. It lists various Business Objects (RBOs) and their associated fields. Two specific rows are highlighted with orange boxes and labeled 'RBO' with blue speech bubbles. The first RBO row contains fields: 'Employee Type', 'Full Legal Name', 'Location', 'Time Zone', 'Cost Center', 'Expense Reports - All Statuses', 'Expense Report ...', 'Expense Report Total Amount', and 'Expense Items on Expense Report'. The second RBO row contains fields: 'Amount' and 'Expense Items'. Blue speech bubbles labeled 'Field from RBO' point to the 'Location' field in the first RBO row and the 'Expense Reports - All Statuses' field in the second RBO row.

In the report output, RBO fields from single instance relationships will show differently than RBO fields from multi-instance relationships. It is important to group RBO fields from multi-instance relationships together. Do not mix in other object/fields in between them in your report definition, as results may not align.

- Single instance RBO fields
- Multi-Instance RBO fields

WICT RW Training Report 1

The screenshot shows a report titled "WICT RW Training Report 1" with a toolbar at the top. Below the toolbar is a table with 104 items. The table has columns for Employee ID, Hire Date, Active Status, Worker Type, Employee Type, Legal Name, Location, Time Zone, Cost Center, and Expense Reports - All Statuses. The "Time Zone" and "Expense Reports - All Statuses" columns are highlighted with orange boxes. The "Expense Reports - All Statuses" column contains multiple rows of expense reports, each with columns for Expense Report, Amount, and Expense Items. The "Expense Items" column lists categories like Airfare, Hotel, Accommodations, Meals, Miscellaneous, Taxis / Trains / Shuttles, and so on.

Employee ID	Hire Date	Active Status	Worker Type	Employee Type	Legal Name	Location	Time Zone	Cost Center	Expense Reports - All Statuses
-	02/01/2008	Yes	Employee	Regular	Yolanda Torres	Chicago	Central Time (Chicago)	41500 HR Operations	Expense Report EXP-00003386 Expense Report EXP-00003434 Expense Report EXP-00003466 Expense Report EXP-00003485
									Expense Report EXP-00003386 Expense Report EXP-00003434 Expense Report EXP-00003466 Expense Report EXP-00003485

SORTING AND FILTERING ON RELATED BUSINESS OBJECT FIELDS

SORT & SUBSORTS

With Advanced report types, you can also specify the sort sequence for related business object data in your report. If you do not configure any sort information, reports are by default always sorted by the **first Primary Business Object (PBO) field** listed under the Columns tab and then *for each instance of the Primary Business Object*, the related business object instances are sorted by the **first RBO field listed** under the Columns tab. This is the default sort.

You can always configure a different sort order for your PBO instances and a different **subsort order for the related business object instances for a given PBO instance**. Both the sort and subsort configurations are under your report's Sort tab.

For example, if Employees were the primary business object and Dependents were the related business object, you would specify how you want the employees sorted and then how for each employee, how dependents should be sorted. If no sort criterion is specified for the related business objects, the report will sort the data based on the first (leftmost) column that is associated with the related business object.

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced				
Sort and Group											
2 items											
<input checked="" type="checkbox"/> Location	Sort Direction Alphabetical - Ascending			Display Headers		Summarize Detail Rows					
<input checked="" type="checkbox"/> Age Group	Logical sort order - Descending										
Grouping and Totaling Options											
Enable Outlining based on Grouping											
Include Group Name in Headers and Subtotals											
Include "Total" label in Subtotals											
Display Grand Totals											
Sub Level Sort											
Sort Criteria											
Business Object <input checked="" type="checkbox"/> Expense Reports - All Statuses											
<table border="1"> <thead> <tr> <th>Field</th> <th>Sort Direction</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Expense Report Total Amount</td> <td>Alphabetical - Ascending</td> </tr> </tbody> </table>								Field	Sort Direction	<input checked="" type="checkbox"/> Expense Report Total Amount	Alphabetical - Ascending
Field	Sort Direction										
<input checked="" type="checkbox"/> Expense Report Total Amount	Alphabetical - Ascending										

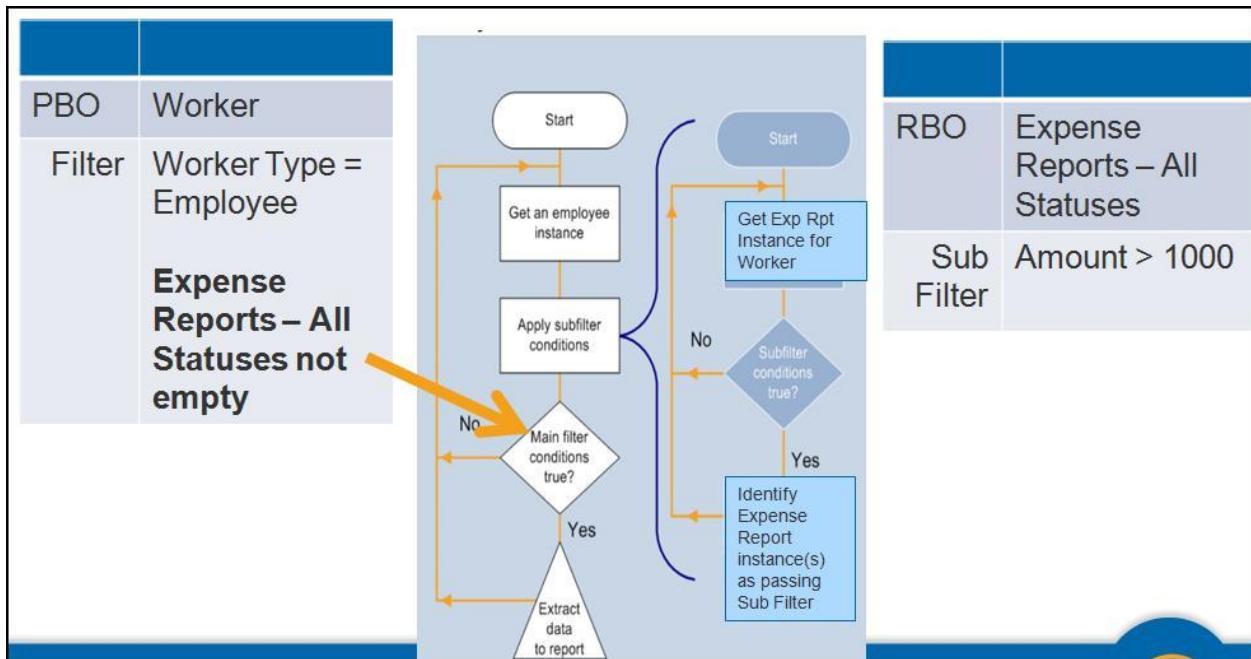
SUBFILTERS

Advanced reports include a **Sub Filters** tab for **defining filter criteria on related business objects**.

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Sub Level Filter							
Business Object Expense Reports - All Statuses							
And/Or	(Field	Operator	Comparison Type	Comparison Value		
And		Expense Report Total Amount <input type="button" value="..."/>	greater than or equal to	Prompt the user for the value	Default Prompt		

FILTER/SUB-FILTER LOGIC

It is important to understand how your report Filter and Sub Filter interact. For a given instance of your PBO, the **subfilter logic is executed first, then your Filter logic**. In the below example, Employee is the PBO and Dependent is the RBO. When the report is run, for each instance of the PBO (Employee), the Sub-Filter logic is executed first (what Dependent instances should be returned for that worker). If your subfilter condition is true, an instance (or instances) of the RBO (Dependent) will be returned. If your subfilter condition is false, no instance of the RBO will be returned. Since the Filter logic follows the subfilter, it is important to include the condition (**RBO not empty**) in your filter so that your subfilter results rule out instances of the PBO on the report.





ACTIVITY 6 – WORKING WITH RELATED BUSINESS OBJECTS

Business Case: Logan McNeil has been asked to include information about workers and their expense reports, including the amount and expense items on each expense report.

TASK 1 – ADD FIELDS FROM DEPENDENTS RBO TO YOUR REPORT.

1. Find your *WICT RW Training Report 1* and go into **Edit** mode.
2. Under the **Columns** tab, remove the following fields for ease of usability in this activity:
 - a. Active Status
 - b. Worker type
 - c. Employee type
 - d. Full Legal Name
 - e. Age
 - f. Age Group
3. Under the **Columns** tab, find the Location field and add a row below it to pull the *Time Zone* field from the *Location* related business object.

Business Object	Field Name
Location	Time Zone

Columns	Sort	Filter	Subfilter	Prompts	⋮
9 items					
<input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="▼▼"/> <input type="button" value="▲▼"/> <input type="button" value="▲▼"/>	Order	*Business Object	Field		
<input type="button" value="+"/> <input type="button" value="-"/>		Worker	Worker <input checked="" type="checkbox"/>		<input type="button" value="↑"/>
<input type="button" value="+"/> <input type="button" value="-"/>		Worker	Hire Date		<input type="button" value="↑"/>
<input type="button" value="+"/> <input type="button" value="-"/>		Worker	Location		<input type="button" value="↑"/>
<input type="button" value="+"/> <input type="button" value="-"/>		Location	Time Zone		<input type="button" value="↑"/>

4. Let's now add fields from the *Expense Report –All Statuses* related business object. Still under the **Columns** tab
5. First remove the field: *Expense Report – All Statuses* from the report.
6. Add the following fields from the Expense Report – All Statuses related business object:

Business Object	Field Name
Expense Report – All Statuses	Expense Report
Expense Report – All Statuses	Expense Report Total Amount
Expense Report – All Statuses	Expense Items on Expense Report

9 items

<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▼ ▼"/>	Worker	Worker <input checked="" type="checkbox"/>
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Worker	Hire Date
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Worker	Location
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Location	Time Zone
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Worker	Supervisory Organization
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Worker	Cost Center
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Expense Reports - All Statuses	Expense Report
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▼"/>	Expense Reports - All Statuses <input checked="" type="checkbox"/>	Expense Report Total Amount
<input type="button" value="+"/>	<input type="button" value="-"/>	<input type="button" value="▲ ▲"/>	Expense Reports - All Statuses <input checked="" type="checkbox"/> <input type="button" value="..."/>	Expense Items on Expense ... <input type="button" value="..."/>

7. Click **OK** to save your report and **Run** report using your "2008 Regular Employee Hires" Saved filter.

WICT RW Training Report 1

Instructions Please enter employee types to return. If left blank, all employee types will be returned.

Employee Type (Optional)	<input type="text" value="Regular"/>
Start	* <input type="text" value="01/01/2008"/>
End	* <input type="text" value="12/31/2008"/>
<input type="button" value="Untitled Filter"/>	
Manage Filters	<input type="button" value="Save"/>
3 Saved Filters <input type="button" value="▼"/>	
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Report Writer for Workday

8. See how Workers are listed and for each location the worker is in, the **Time Zone** now shows.

9. See how for each worker, where data exists, expense report data is now shown. The results show one row of output per each instance of an expense report for a given worker.

Worker	Hire Date	Location	Time Zone	Supervisory Organization	Cost Center	Expense Reports - All Statuses		
						Expense Report	Expense Report Total Amount	Expense Items on Expense Report
Yolanda Torres	02/01/2008	Chicago	Central Time (Chicago)	HR Operations Americas Group	41500 HR Operations	Expense Report: EXP-00003434	1,264.45	Airfare Hotel Accommodations Meals Parking Taxis / Trains / Shuttles
						Expense Report: EXP-00003386	1,312.73	Airfare Hotel Accommodations Meals Miscellaneous Taxis / Trains / Shuttles

TASK 2 – ADD A SUB-SORT

1. Go back and **edit** your report, go to the **Sort** tab

2. **Add a Sub Level Sort**

Field	Enter
Business Object	Expense Reports – All Statuses (you can use the prompt to see "Business Objects on Report")
Field	Expense Report Total Amount
Sort Direction	Alphabetical - Ascending

Grouping and Totaling Options

Enable Outlining based on Grouping

Include Group Name in Headers and Subtotals

Include "Total" label in Subtotals

Display Grand Totals

Sub Level Sort

Add Sub Level Sort

Sort Criteria

Business Object * Expense Reports - All Statuses

search

- Business Objects on Report ▶
- All ▶
- By Category ▶
- Global Fields ▶
- Other ▶
- Create

+	Order	Field	*Sort Direction
+	▼ ▲	Expense Report Total Amount	Alphabetical - Ascending

3. Click **OK** to save and **Run** report using your "2008 Regular Employee Hires" saved filter.
4. Note how for a given worker, expense reports are now sorted by amount.

TASK 4 – ADD A SUB-FILTER

1. Go back into **edit** mode for your report and go to the **Sub Filter** tab.
2. Add a Subfilter

Field	Enter
Business Object	Expense Reports – All Statuses
Field	Expense Report Total Amount
Operator	Frequently Used > greater than or equal to
Comparison Type	Common > Prompt the user for a value
Comparison value	Default prompt

3. Click **OK** to save your report and **Run** report using saved filter: "2008 Regular Employee Hires" and enter **1000** for the amount prompt.

The screenshot shows the 'WICT RW Training Report 1' dialog box. It includes the following fields:

- Expense Report Total Amount: 1000
- Employee Type (Optional): Regular
- Start: 01/01/2008
- End: 12/31/2008
- Filter: Untitled Filter
- Buttons: OK, Cancel, Manage Filters, Save, and a dropdown for 3 Saved Filters.

4. Scroll through the output and see how there are some workers in the output with no data for expense reports.

Report Writer for Workday

Worker	Hire Date	Location	Time Zone	Supervisory Organization	Cost Center	Expense Reports - All Statuses		
						Expense Report	Expense Report Total Amount	Expense Items on Expense Report
						Expense Report: EXP-00004662	3,660.00	Airfare Lodging Meals
Kim Slater	02/01/2008	Chicago	Central Time (Chicago)	Financial Planning & Analysis	51100 Finance Mgmt - Corp Acctg	Expense Report: EXP-00003388	1,100.00	Dues & Subscriptions Training & Seminar Fees
Laurie Jenkins	02/01/2008	Chicago	Central Time (Chicago)	Global Support - USA Group	33100 Global Support - North America			
Amanda Mackenzie	02/01/2008	Chicago	Central Time (Chicago)	Product Management Group	32200 R&D - Product Management			
Leila Ortiz	02/01/2008	Chicago	Central Time (Chicago)	Product Development Group	32300 R&D - Product Development	Expense Report: EXP-00003738	1,034.00	Airfare Hotel Accommodations Meals

- Why are these workers on the report output when they don't have any expense report data with amounts > 1000?

Answer: Because the subfilter logic goes first, if for a given worker there is no expense report data over \$1000, the subfilter will return an empty instance. Your filter condition must then check and only show workers where the RBO instance returned is 'not empty'.

TASK 4 – FILTER TO ONLY SHOW WORKERS WHERE RELATED EXPENSE REPORT DATA EXISTS

- Go back into **Edit** mode for your report, and go to the **Filter** tab.
- Add a row to your existing filter conditions to only show workers where Expense Report data exists
 - Field: **Expense Reports – All Statuses**
 - Operator: Frequently Used > **Is Not empty**

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Specify the filter condition that should be used for the report							
4 items							
+	Order	And/Or	(*Field	*Operator		
+	▼ ▲	And		Hire Date	greater than or equal to		
+	▲ ▼	And		Hire Date	less than or equal to		
+	▲ ▼	And		Employee Type	any in the selection list		
+	▲ ▲	And		Expense Reports - All Statuses	is not empty		

- Click OK to save and **Run** report using the "2008 Regular Employee Hires" saved filter and amount 1000. See how now, you only see workers with expense reports over 1000.

(End of Activity)



WORKSHOP #1 – Employee Benefits

Our benefits department has issued a requirement for report to be built that shows all workers that are regular employees and lists all of their current benefit elections (including medical, dental, 401K, short/long term disability). Employees that have not enrolled in benefits should not be displayed in the report output.

Requirements: Employee Benefits Reports

1. Name the report *WICT RW Employee Benefits*.
2. Develop a custom report that has the following output:
 - a. For each regular employee, show:
 - i. Employee
 - ii. Social Security Number
 - iii. Management Level
 - b. Then for each benefit election that the employee has, show:
 - i. Benefit Provider
 - ii. Benefit Plan
 - iii. Benefit Type
 - iv. Date Last Changed
 - v. Dependents
3. Filter OUT anyone who does not have any elections at all.
4. Only display the current election for each benefit type. We don't want any past or future elections.
(Hint: read the description for the related business object.)

Worksheet:

1. What would your PBO be?
 - i. Does it contain the Report Fields you need? How can you verify?
 - ii. What view or Data Source do you need?
 - iii. Do you need to **Filter** down the instances further?
2. What would your RBO be?
 - i. Does it contain the fields you need?
 - ii. Do you need to **sub-filter** down the instances further?

Solution in back of guide if needed.



WORKSHOP #2 – Unpaid Invoices

Teresa has been asked to create a report showing unpaid invoices for suppliers where the spend category invoices office equipment or supplies.

Requirements: Unpaid Supplier Invoices for office supply related spend categories.

Be sure to login as Teresa Serrano (not Logan) for this workshop: **tserrano**

1. Name the report *WICT RW Unpaid Supplier Invoices for Office Supplies and Furniture*
2. Develop a custom report that has the following output:
 - a. For each supplier invoice, show:
 - i. Supplier Invoice Document
 - ii. Company
 - iii. Supplier
 - iv. Due Date
 - v. Invoice Amount in Base Currency
 - vi. Document Payment Status
 - b. Then for each supplier invoice line, show:
 - i. Supplier Invoice Line
 - ii. Spend Category
 - iii. Extended Amount in Company Base Currency
3. Filter to only show payment statuses of partially paid or unpaid invoices for approved invoices only.
4. Filter to only show supplier invoice lines related to spend categories of office equipment or office supplies. (Hint: this filter is for your RBO, so the 'sub filter' tab)

Worksheet:

1. What would your PBO be?
 - i. Does it contain the Report Fields you need? How can you verify?
 - ii. What view or Data Source do you need?
 - iii. Do you need to **Filter** down the instances further?
2. What would your RBO be?
 - i. Does it contain the fields you need?
 - ii. Do you need to **sub-filter** down the instances further?

Solution in back of guide if needed.

CONTEXTUAL REPORTING

Contextual Reporting in Workday is a key resource when you know the data, but not the meta data, i.e. when you know the data you want to report on, but not the object definitions and report fields for that data.

When viewing the data you're interested in, say a given employee or given expense report, select **Reporting** from the related action icon and you will find 3 main contextual reporting choices.

In the example below, you can use contextual reporting options when viewing a given expense report to either (1) create a custom report about expense reports, (2) see related reports that are about expense reports, or (3) see all the report fields and values around an expense report definition with the value shown for the given expense report example.

The screenshot shows the 'View Expense Report' page for EXP-00004381. On the left, there's a sidebar with 'Expense Report Info' containing fields like Company (Global), Expense Report Date (06/25/2023), Created On (06/13/2023), Approval Date (06/18/2023), and Business Purpose (Internal). An orange arrow points from the 'Reporting' link in the sidebar to the 'Available Actions' section on the right. The 'Available Actions' section includes links for 'Expense Report', 'Audits', 'Business Process', 'Favorite', 'Integration IDs', and 'Reporting'. The main content area is titled 'Expense Report EXP-00004381' and shows details like Status (Approved), Pay To (Logan McNeil), Type (Employee), and Item (Log). A callout box highlights the 'Create Custom Report from Here' link, which is part of a larger group of links: 'Related Reports' and 'Report Fields and Values'.

Contextual reporting options can be used to create and view related reports **directly from the context of a given object**. Contextual reporting can enhance your knowledge of fields, objects and data sources associated with a given object, and allows you to view existing related reports that may be repurposed or customized all in the context of a given object.

Many Workday business objects, such as a worker or a supplier invoice, support creating a custom report directly from them in the context of where you are in the application. The value of this option, referred to as contextual reporting, is that it leverages where you are in the application, enabling you to quickly build a report using data with which you are already familiar.

Create Custom Report from Here

This option can be used to create a custom report using this object as the basis for available data sources that contain this object in them. Workday automatically restricts the data sources available for the report to those that are based on the Worker Object.

You can select report fields to include in your custom report, referencing the field descriptions and values for given instance for more insight.

Create Custom Report

Expense Report * Expense Report: EXP-00004381

Report Fields 190 items

Select	*Field	Value	Description
<input type="checkbox"/>	Accounting Date for Operational Transaction	06/25/2013	Accounting Date for Operational Transaction. This is the accounting date from posted journal for operational transaction. If transaction is canceled this is the accounting date from the most recently created journal for transaction, which could be the accounting date from a reversing journal.
<input type="checkbox"/>	Amount Spent for Obligation Spend Analysis Type	\$0.00	The amount spent for all documents that are in the "obligation" state. This is used in the Total Spend for Company (YTD) report/worklet.
<input type="checkbox"/>	Amount Spent for Potential Spend Analysis Type	\$0.00	The amount spent for all documents that are in the "potential" state. This is used in the Total Spend for Company (YTD) report/worklet.
<input type="checkbox"/>	Amount Spent for Spend Spend Analysis Type	\$0.00	The amount spent for all documents that are in the "spend" state. This is used in the Total Spend for Company (YTD) report/worklet.

Related Reports

This useful reporting tool displays all reports whether custom or workday delivered that use this business object as the primary object on the report.

Related Reports

Business Object Expense Report

7 items

Report Name	Description	Type	Categories	Report Tags
Average Expense Cycle Times	This report details the average expense processing times for approval and payment in days by cost center. This report requires prompts for Company as well as From and To Expense Report Approval dates.	Custom		
Average Expense Report Total ...	This report details the average total expense amount for approved expense reports by cost center. This report requires prompts for Company, From and To Expense Report Approval dates and reporting currency.	Custom		
Expense Report for Print		Workday Delivered		
Expense Report for Print - Report Design		Workday Delivered		
Indexed RDS Comparison for Expense Reports Part 1		Workday Delivered		
Indexed RDS Comparison for Expense Reports Part 2		Workday Delivered		
List of Expense Reports for LTM		Custom	Expenses	

Report Fields and Values

This option displays all the report fields and values related to the selected business object and instance. It only displays fields that you are allowed to view. It enables you to sort, filter and export the fields to Excel so that you can become familiar with the Workday fields by viewing them in the context of your own data. For each field, you can also see data sources that include those fields for reporting.

Report Fields and Values

Business Object Expense Report

Expense Report Expense Report: EXP-00004381

Report Fields 190 items

Field	Value	Field Type	Related Business Object	Category	Description	Data Sources
Accounting Date for Operational Transaction	06/25/2013	Date		Date or Time Period	Accounting Date for Operational Transaction. This is the accounting date from posted journal for operational transaction. If transaction is canceled this is the accounting date from the most recently created journal for transaction, which could be the accounting date from a reversing journal.	3
Amount Spent for Obligation Spend Analysis Type	\$0.00	Currency		Amount	The amount spent for all documents that are in the "obligation" state. This is used in the Total Spend for Company (YTD) report/worklet.	3
Amount Spent for Potential Spend Analysis Type	\$0.00	Currency		Amount	The amount spent for all documents that are in the "potential" state. This is used in the Total Spend for Company (YTD) report/worklet.	3
Amount Spent for Spend Spend Analysis Type	\$0.00				*****	3
Amount Spent for Unpaid Spend Analysis Type	\$0.00				*****	3
Any Non Canceled Settlement Runs					*****	3
Any Per Diem Expense Items on Expense Report					*****	3
Approval Date	06/18/2013				*****	3
Approved	Yes	Boolean		Worker	Returns true if the expense report has been approved.	3



Activity 7 DEMO – CONTEXTUAL REPORTING OPTIONS

When you know the data, but not the objects behind the data, use Contextual Reporting options to get insight to the business objects, available report fields, and see values mapped to the available report fields for your given context.

TASK 1 - CREATE CUSTOM REPORT FROM HERE

1. Search for the *Accounts Payable* supervisory organization (*org: Accounts Payable*)
2. Using related actions for the Accounts Payable organization object, select **Reporting** and then select **Create Custom Report from Here**
3. See how the **Value** column shows the values for your context, the Accounts Payable supervisory organization mapped to the available report fields.
4. Select some example fields and click **OK** to start your custom report.

Create Custom Report

Supervisory Organization * Accounts Payable Department

Report Fields 244 items

		b	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Level from top		The number of levels down from the top level organization for this organization.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Name	Accounts Payable	The organization name for the organization.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Name in Spanish	Departamento de Cuentas a Pagar	
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Role Assignments		Contains the explicit organizational role assignments for this worker. For each assignment, returns the worker, organization role and organization as one field. Does not include organization roles that have been defaulted.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Roles		Contains the organizational roles that have been granted to this worker. Includes any organization roles that have been explicitly assigned, defaulted or inherited.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Roles with Role Assignee	Manager	Organization Roles with role assignee directly assigned to the role. This excludes inherited or defaulted roles assignments.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Subtype	Department	The organization subtype (e.g. Business Unit, Department, etc.) for the organization.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization Type	Supervisory	The organization type (e.g. Cost Center, Supervisory, etc.) for the organization.
<input type="checkbox"/>	<input checked="" type="checkbox"/> Organization and Subordinates	Accounts Payable Department	Returns the organization and all of its subordinate organizations.

5. Name your report, e.g. *WICT RW Report on Sup Orgs using Contextual Reporting*.
6. Select a data source: *Top Level Organizations and Subordinates* and choose a report type, e.g. Advanced.

Create Custom Report

Report Name	* <input type="text" value="WICT RW Report on Sup Orgs using C"/>
Data Source	* <input type="radio"/> Organizations I Manage <input type="radio"/> Organizations I Support (Includes Orgs with No Members) <input type="radio"/> Organizations I Support or Manage <input type="radio"/> Organizations I Support or Manage (with inactive organizations) <input type="radio"/> Supervisory Organizations <input type="radio"/> Top Level Organizations <input checked="" type="radio"/> Top Level Organizations and Subordinates <input type="radio"/> Top Level Organizations with Unassigned Roles
Data Source Filter	(empty)
Report Type	* <input style="width: 100px;" type="text" value="Advanced"/> <input type="button" value="▼"/>
Temporary Report	<input type="checkbox"/>

- Click OK. Now you are in the report definition and can further configure the report with additional fields (columns), sort criteria, filter criteria and more.

TASK 2 - RELATED REPORTS

- Search for a location *Boston (loc: Boston)*
- Using related actions for the Boston location object, select **Reporting** and then select **Related Reports** to see other reports in the tenant for Business Object: Location.

Related Reports					
Business Object : Location					
7 items					
Report Name	Description	Type	Categories	Report Tags	
Accounting Worktag Reference Ids		Workday Delivered			
Custom Worktag Counts		Workday Delivered			
Data Audit - Worktags		Custom			
Location Directory	View all Business Sites and their usage, public phone numbers, primary addresses, and public email addresses. Enables you to find, contact, or edit business sites. Required prompt: none Optional prompt: none	Workday Delivered	Organizations		
Location Directory Map		Custom		Directory Organizations	

TASK 3 - REPORT FIELDS AND VALUES

- Search for job profile *IT HelpDesk Specialist (job: helpdesk)*
- Using related actions, select **Reporting** and then select **Report Fields & Values**
- Similar to Create Custom report from here, this option just shows you the available report fields and values mapped for your context so that you can get better insight into how the data is captured in report fields.

Report Fields and Values						
Business Object : Job Profile						
Job Profile : IT HelpDesk Specialist						
Report Fields : 63 items						
Field	Value	Field Type	Related Business Object	Category	Description	Data Sources
Average Pay - Amount	\$0.00	Currency		Compensation	The average base pay for employees in positions with this job profile. This is calculated by taking the sum of the employee's base pay who are in positions with the job profile, and dividing by the number of workers. The number is represented as an annualized amount in the reporting currency for the Workday system.	2
Benchmark Job		Single Instance	Compensation Benchmark Default	Compensation	This is the associated active Benchmark Job for a Job Profile.	2
Candidate Details		Multi-Instance	Nomination	Job & Position	Note that the rows and data returned associated with this field are "effective date" aware. Entering an effective date at run time will control what data is returned.	2
Certifications		Multi-Instance	Certification	Skills and Experience	Contains the targeted certifications.	2

Reporting>Report Fields and Values is a great troubleshooting option especially when done for event business objects. (End of Activity)

SUBTOTALING, GROUPING & OUTLINING REPORTS

When building Simple or Advanced Reports, Workday's Report Writer tool allows you to generate subtotals, grand totals, headers, groupings and collapse-able / expandable outlines.

Below is an example of a report enabled for outlining. In this example, the Tokyo location is expanded along with one supervisory organization, showing the worker information details for that Location/Supervisory Organization grouping.

Group Name	Worker	Total Base Pay Annualized in USD - Amount	Count	Hire Date	Manager - Level 01	Social Security Number - Formatted	Date of Birth	Emergency Contacts
(+) Sydney		\$366,542.62	6					
Tokyo								
Field Sales - Asia/Pac Group								
Nobu Matsuda (松田信)	Nobu Matsuda (松田信)	\$90,792.49	1	01/01/2000	Peter Gao (高懷德)		05/29/1970	Hiromi Matsuda
(+) Field Sales - Asia/Pac Group		\$90,792.49	1					
(+) Global Support - JAPAC Group		\$49,595.90	1					
(+) Global Support - Japan Group		\$51,811.51	2					
(+) Tokyo		\$192,199.90	4					
(+) Toronto		\$403,018.24	7					
		!!!						

The configuration options under the Report Writer sort sequence and group hierarchy of your report.

Sort tab provide for these features starting with the Which fields to sort and group on.

Under the Sort tab you can also configure:

- **Display Subtotals** for a given sort field
- **Summarize Detail Rows** for a given sort field
- **Display Headers** if grouping data
- **Enable Outlining** based on Groupings
- **Display Grand Totals** and more

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Sort and Group							
2 items							
+	Order	Field	Sort Direction	Display Headers	Summarize Detail Rows	Display Subtotals	Group Name Override
+	▼ ▲	Location	Alphabetical - Ascend ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
+	▲ ▼	Supervisory Organization	Alphabetical - Ascending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Grouping and Totaling Options							
<input checked="" type="checkbox"/> Enable Outlining based on Grouping <input type="checkbox"/> Include Group Name in Headers and Subtotals <input type="checkbox"/> Include "Total" label in Subtotals <input checked="" type="checkbox"/> Display Grand Totals							
Sub Level Sort							
Add Sub Level Sort							

SUBTOTALS & GRAND TOTALS

Steps to implement:

Columns Tab:

- Field **Options**: Select numeric or currency field(s) on report to Aggregate and to show subtotals for (Valid Options: Sum, Average, Minimum, Maximum)
- Include the **Count** field (Global field) if you want to show subtotals for the # of instances (rows) of the Primary Business Object

The screenshot shows the 'Columns Tab' interface. On the left, there's a table with columns for 'Field', 'Column Heading Override', and several other columns. A numeric field 'Total Base Pay Ann' is selected. A context menu is open over this field, titled 'Valid Options'. It lists several aggregation options: Average, Do Not Show if Empty, Maximum, Minimum, Show Blank When Zero, Show Currency Code Column, Show Currency Symbol, and Sum. The 'Sum' option is highlighted. To the right of the menu, there are sections for 'Options' and 'search' with checkboxes for 'Sum' and 'Show Currency Symbol'.

Sort tab:

- Select **Display Subtotal** at desired sort level under Sort tab
- Select **Display Grand Totals** if desired

The screenshot shows the 'Sort' tab of the Report Writer interface. At the top, there are tabs for 'Columns', 'Sort' (which is selected), 'Filter', 'Subfilter', 'Prompts', 'Output', 'Share', and 'Advanced'. Below the tabs, there's a section for 'Sort and Group'. It shows two items being sorted: 'Location' and 'Supervisory Organization'. The 'Location' item is set to sort direction 'Alphabetical - Ascending'. There are checkboxes for 'Display Headers', 'Summarize Detail Rows', and 'Display Subtotals', with 'Display Subtotals' checked. Below this, there's a section for 'Grouping and Totaling Options' with checkboxes for enabling outlining, including group names in headers, including total labels, and displaying grand totals, with 'Display Grand Totals' checked.

Report Writer for Workday

Report Output with Subtotals and Grand Totals:

Worker	Location	Supervisory Organization	Total Base Pay Annualized in USD - Amount	Count	Hire Date	Manager - Level 01	Social Security Number - Formatted	Date of Birth
		Global Support - North America Group	\$28,295.33	1				
Henny Lynch	Toronto	Human Resources	\$130,408.00		06/06/2011	Logan McNeil		04/20/1960
		Human Resources	\$130,408.00	1				
Stella Bauer	Toronto	Property Management Department	\$20,443.18		03/14/2011	Enrique Vasquez		11/23/1983
Maury Irwin	Toronto	Property Management Department	\$36,806.93		02/07/2011	Enrique Vasquez		10/17/1963
Mason Webb	Toronto	Property Management Department	\$36,684.24		03/14/2011	Enrique Vasquez		04/09/1983
		Property Management Department	\$93,934.35	3				
	Toronto		\$435,249.14	7				
Carol Li	Vancouver	Consulting Services - North America Group	\$80,973.76		01/01/2000	Carol Abbott		05/10/1970
		Consulting Services - North America Group	\$80,973.76	1				
Ryan Taylor	Vancouver	Field Sales - North America Group	\$94,376.74		01/01/2000	Angela Bianchi		08/04/1968
		Field Sales - North America Group	\$94,376.74	1				
Dylan Johnson	Vancouver	Global Support - Canada Group	\$38,747.75		01/01/2000	Alain DuBois		06/22/1974
Blair White	Vancouver	Global Support - Canada Group	\$32,402.68		02/22/2011	Alain DuBois		07/15/1947
		Global Support - Canada Group	\$71,150.43	2				
Leah Grant	Vancouver	Property Management Department	\$48,053.49		01/10/2005	Enrique Vasquez		07/05/1967
		Property Management Department	\$48,053.49	1				
	Vancouver		\$294,554.42	5				
Stefania Jaworski	Warsaw	Global Support - Eastern Europe Group	\$34,093.10		05/16/2012	Victoria Nikolayevich Blokov (Виктория Николаевна Блоков)		06/06/1984
		Global Support - Eastern Europe Group	\$34,093.10	1				
	Warsaw		\$34,093.10	1				
			\$23,427,554.44	286				

SUMMARY VS. DETAIL REPORTING OF TOTALS

You can also summarize your totals at defined sort levels. Below is a snapshot of Employee Total Base Pay totals summarized by Location.

Location	Total Base Pay Annualized in USD - Amount
Amsterdam	\$289,447.82
Atlanta	\$1,043,088.49
Auckland	\$72,419.91
Berwyn	\$68,000.00
Boston	\$1,288,904.43
Brussels	\$44,177.68
Calgary	\$175,119.68

Steps to implement:

- Select **Summarize Detail Rows** at desired sort level under Sort tab
- Remove any lower level sort fields that you do not want to summarize on.
- Remove any report fields (Columns tab) that are not being aggregated or sorted on.



Tip: Formatting Numeric or Currency Fields in Thousands and Millions

In your custom report definition, you can apply a 'Format' to a numeric or currency field to display the value with needed formatting, precision, including rounding.

You can even show larger numbers in "Thousands" with a "K" or Millions with an "M" which can be useful, especially with worklets, to not require as much space.

Location	Total		
	Total Salary Expense	Total Salary Expense In Thousands	Total Salary Expense In Millions
San Francisco	7,104,109.30	7,104K	7M
Chicago	3,510,096.38	3,510K	4M
New York	2,663,384.01	2,663K	3M
Dallas	2,208,560.33	2,207K	2M
London	1,782,909.01	1,783K	2M
Boston	1,322,535.23	1,323K	1M
Atlanta	1,043,088.49	1,043K	1M
Singapore	843,339.85	843K	1M
Mexico City	616,514.79	617K	1M
Paris	487,693.41	488K	0M

Thousands		
Format	Internal Value	Display Results
,##0,	-4,598,632	-4,599
,##0.0,	-4,598,632	-4,598.6
,##0,"K"	-4,598,632	-4,599K
,##0.0,"K"	-4,598,632	-4,598.6K
,##0.;(#,##0.)	-4,598,632	(4,599)
,##0.0;(#,##0.0.)	-4,598,632	(4,598.6)
,##0."K";(#,##0."K")	-4,598,632	(4,599K)
,##0.0."K";(#,##0.0."K")	-4,598,632	(4,598.6K)

Millions		
Format	Internal Value	Display Results
,##0.,	-4,598,632	-5
,##0.0.,	-4,598,632	4.6
,##0.,"M"	-4,598,632	-5M
,##0.0.,"M"	-4,598,632	-4.6M
,##0.0.;(#,##0.,)	-4,598,632	(5)
,##0.0.;(#,##0.0.,)	-4,598,632	(4.6)
,##0.,"M";(#,##0.,"M")	-4,598,632	(5M)
,##0.0.,"M";(#,##0.0.,"M")	-4,598,632	(4.6M)

Note: Regarding rounding: The Format option rounds the value displayed

- Each number is rounded independently
- No adjustments are made to ensure display values cross foot with totals



ACTIVITY 8 – CONFIGURE SUBTOTALS AND GRAND TOTALS

Business Case: Teresa has been asked to create a report totaling expense items by worker, cost center and region.

TASK 1 – COPY AN EXISTING CUSTOM REPORT

1. Logout as Logan and **login as Teresa Serrano (tserrano)**. Use the same password as for Logan.
2. From the search box, run the *Copy Custom Report* task.
3. Enter: *WDINST Expense Report Lines for Date Range* as the report to copy and click OK.
4. Rename the report by just changing the prefix to: *WICT RW Expense Report Lines for Date Range* and click OK.
5. Note the report's Primary Business Object and Data Source
6. Review the fields included under the **Columns** tab. All fields are from the report's PBO, no RBO fields included.
7. Click on the **Sort** tab, no sort is configured.
8. Click on the **Filter** tab, see how the report will prompt on an *Expense Report Accounting Start Date* and *End date* to filter the output on.
9. Click on the remaining tabs to orient yourself to the definition.
10. Click **OK** to save your copy and run the report.
11. Enter "Global Modern Services (USA)" for the Company and a date range of 01/01/2008 to 01/01/2009

WICT RW Expense Report Lines for Date Range

Company	<input type="text" value="Modern Services, Inc. (USA)"/>
Starting Expense Report Accounting Date	<input type="text" value="01/01/2008"/>
Ending Expense Report Accounting Date	<input type="text" value="01/01/2009"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

12. Click OK to run the report and review the results.

TASK 2 – SUBTOTALING & GRAND TOTALING

1. We will now go back and aggregate the *Expense Line Amount in USD* field to show subtotals (and grand totals) by Region and Cost Center.
2. Go back into **edit** mode for your report.
3. Under the **Columns** tab, find the *Expense Line Amount in USD* field, and under *Options > Valid Options*:
 - a. Select **Show currency symbol**
 - b. Select **Sum** (this is the aggregation option you want for your subtotaling)

Business Object	Field	Column Heading Override	Format	Options
Expense Report Line	Expense Item <input checked="" type="checkbox"/>			
Expense Report Line	Expense Line Amount in USD <input checked="" type="checkbox"/> <input type="button" value="Format"/>			search Top > Valid Options Average Do Not Show If Empty Maximum Minimum Show Blank When Zero Show Currency Code Column Show Currency Symbol Sum
Expense Report Line	Worker <input checked="" type="checkbox"/>			
Expense Report Line	Expense Report <input checked="" type="checkbox"/>			
Expense Report Line	Region <input checked="" type="checkbox"/>			
Expense Report Line	Cost Center <input checked="" type="checkbox"/>			
Group Column Headings				

4. While still in edit mode, go to the **Sort** tab –
 - a. Add the following 2 fields for your sort and group fields: (hint: use “Fields on Report” when using the prompt)
 - a. Region (choose sort direction: Alphabetical – Ascending)
 - b. Cost Center (sort direction: Alphabetical – Ascending)
 - b. Select **Display Subtotals** for each sort field
 - c. Select **Display Grand totals** checkbox.

Report Writer for Workday

Columns		Sort	Filter	Subfilter	Prompts	Output	Share	Advanced	
Sort and Group									
2 items									
+/-	Order	Field	Sort Direction		Display Headers	Summarize Detail Rows	Display Subtotals		
+/-	▼ ▲	Region <input type="text"/>	Alphabetical - Ascending		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
+/-	▲ ▼	Cost Center <input type="text"/> <input type="button"/> <input type="button"/>	Alphabetical - Ascending <input type="button"/> <input type="button"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
◀									
Grouping and Totaling Options									
Enable Outlining based on Grouping		<input type="checkbox"/>							
Include Group Name in Headers and Subtotals		<input type="checkbox"/>							
Include "Total" label in Subtotals		<input type="checkbox"/>							
Display Grand Totals		<input checked="" type="checkbox"/>							

- Click **OK** to save your report and **Run**. Use “Global Modern Services, Inc. (USA)” as the Company and 01/01/2008 to 01/01/2009 for the date range.
- Note subtotals for your defined sort fields. See how it is difficult to read the report given the order of the columns not aligning with the sort order.

TASK 3 – ADD COUNT FIELD

- Go back and edit your report one more time.
- Under the **Columns** tab, make the following configurations:
- Re-order the fields to match your Sort order. Using the order black arrows, order the fields as: Region, Cost Center, Worker, Expense Item, Expense Report, Expense Line Amount in USD.



- Add the “Count” field to your report

Columns		Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
7 items								
	Order	*Business Object	Field	Column Heading Override		Format	Options	
		Expense Report Line	Region					
		Expense Report Line	Cost Center					
		Expense Report Line	Worker					
		Expense Report Line	Expense Item					
		Expense Report Line	Expense Report					
		Expense Report Line	Expense Line Amount in USD				Show Cum Sum	
		Expense Report Line	Count		search		search	

- Click OK to save and run the report to see the results. Use "Global Modern Services, Inc. (USA)" as the Company and 01/01/2008 to 01/01/2009 for the date range.
- See the subtotals at the Region and Cost Center levels. See the count of instances (rows) at each subtotal break. Also scroll the bottom of the report to see the Grand Totals.

Region	Cost Center	Worker	Expense Item	Expense Report	Expense Line Amount in USD
US - Southeast	71200 Field Sales - North America	Angela Bianchi	Airfare	Expense Report: EXP-00003407	732.50
	71200 Field Sales - North America				2,160.50
US - Southeast					2,160.50
US - West	71200 Field Sales - North America	Madeline Fleming	Car Rental & Gas	Expense Report: EXP-00003372	55.00
US - West	71200 Field Sales - North America	Madeline Fleming	Hotel Accommodations	Expense Report: EXP-00003372	175.00
US - West	71200 Field Sales - North America	Madeline Fleming	Airfare	Expense Report: EXP-00003372	157.00
US - West	71200 Field Sales - North America	Madeline Fleming	Miscellaneous	Expense Report: EXP-00003372	20.00
US - West	71200 Field Sales - North America	Madeline Fleming	Meals	Expense Report: EXP-00003372	175.00
US - West	71200 Field Sales - North America	Madeline Fleming	Meals	Expense Report: EXP-00003372	65.00
US - West	71200 Field Sales - North America	Madeline Fleming	Entertainment	Expense Report: EXP-00003372	175.00
	71200 Field Sales - North America				822.00
US - West					822.00
					68,454.47

TASK 4 - COPY AND CONFIGURE A SUMMARY TOTALS VERSION (OPTIONAL)

- Using related actions off your report definition, select **Custom Report > Copy**
- Name your copied report: *WICT RW Expense Report Lines for Date Range - Summary*
- Click OK.
- Under the **Sort** tab – select **Summarize Detail Rows** for the *Region* sort field. Remove all lower sort fields and deselect the *Display Subtotals* checkbox.

Columns		Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Sort and Group								
	Order	Field	Sort Direction		Display Headers	Summarize Detail Rows	Display Subtotals	Group Name Override
		x Region		x Alphabetical - Descending		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Under the **Columns** tab, *remove* the following fields. Remember that when you choose to summarize detail rows, the only fields under the Columns tab must be fields used in the sort or aggregation. Other fields must be removed.
 - a. Cost Center
 - b. Worker
 - c. Expense Item
 - d. Expense Report
 - e. Count
6. Click **OK** to save and run.

Region	Expense Line Amount in USD
US - West	822.00
US - Southeast	2,160.50
US - Central	3,786.00
Headquarters - Corporate	61,685.97
	68,454.47

7. Let's lastly go back and edit the report to control the 'format' of the numeric data shown as well as add a row sequence.
8. Edit your report and under the **Columns** tab,
 - a. Add a new field as the first field in report as: **Row Sequence**
 - b. For the *Expense Line Amount in USD* field,
 - i. Try a different **format** to represent the value, e.g. Thousands: `,##0 "K"`.

The screenshot shows the 'Columns' tab in the Report Writer. There are three items listed: 'Expense Report Line' (Order 1, Row Sequence), 'Expense Report Line' (Order 2, Region), and 'Expense Report Line' (Order 3, Field). A context menu is open over the third item, showing options for 'Format' (set to '#,##0,"K"') and 'Options'.

9. Click OK to save and run the report one last time with the same parameters.
10. Note the row sequence and the formatting of the expense line amount totals with 'thousands' shown with "K" given our format. Try other formats as time permits.

Row Sequence	Region	Expense Line Amount in USD
1	US - West	1K
2	US - Southeast	2K
3	US - Central	4K
4	Headquarters - Corporate	62K
		68K

(End of Activity)

GROUPING & OUTLINING

Workday's Report Writer tool allows you to group your report data in visual groupings and also provide for collapsible/expandable outlining.

GROUPING

Group Name	Worker	Total Base Pay Annualized in USD - Amount	Count	Hire Date	Manager - Level 01	Social Security Number - Formatted	Date of Birth	Emergency Contacts
Sydney		\$366,542.62	6					
Tokyo								
Field Sales - Asia/Pac Group	Nobu Matsuda (松田 信)	\$90,792.49		01/01/2000	Peter Gao (高 優惠)		05/29/1970	Hiromi Matsuda
Field Sales - Asia/Pac Group		\$90,792.49	1					
Global Support - JAPAC Group								
	Hiro Yoshida (吉田 弘)	\$49,595.90		01/01/2000	Nikhil Rao		04/23/1978	Rika Yoshida
			111					

Steps to implement:

- Columns tab:
 - Add the global field: **Group Name** as the first field in the report
- Sort tab:
 - **Specify Sort Fields (i.e. Groupings)**
 - **Display Headers (optional)**

OUTLINING

Outlining provides for an expandable/collapsible option to view report output based on defined groupings

Group Name	Worker	Total Base Pay Annualized in USD - Amount	Count	Hire Date	Manager - Level 01	Social Security Number - Formatted	Date of Birth	Emergency Contacts
(+) Sydney		\$366,542.62	6					
Tokyo								
Field Sales - Asia/Pac Group	Nobu Matsuda (松田 信)	\$90,792.49		01/01/2000	Peter Gao (高 優惠)		05/29/1970	Hiromi Matsuda
(+) Field Sales - Asia/Pac Group		\$90,792.49	1					
(+) Global Support - JAPAC Group		\$49,595.90	1					
(+) Global Support - Japan Group		\$51,811.51	2					
(+) Tokyo		\$192,199.90	4					
(+) Toronto		\$403,018.24	7					
			111					

Steps to implement:

- **Columns tab:**
 - Add the global field: Group Name as the first field in the report
- **Sort tab:**
 - **Specify Sort Fields for Groupings**
 - **Display Headers (optional)**
 - **Enable Outlining based on Grouping**

Sort and Group								
2 items								
	Order	Field	Sort Direction	Display Headers	Summarize Detail Rows	Display Subtotals	Group Name Override	
		Location	Alphabetical - Ascend ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		Supervisory Organization	Alphabetical - Ascending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		

Grouping and Totaling Options

Enable Outlining based on Grouping	<input checked="" type="checkbox"/>
Include Group Name in Headers and Subtotals	<input type="checkbox"/>
Include "Total" label in Subtotals	<input type="checkbox"/>
Display Grand Totals	<input checked="" type="checkbox"/>

Limitations for Outlining:

- All fields on an outlined report must be associated with the **Primary Business Object (PBO) only**. You cannot have fields from RBOs on a report enabled for outlining.



ACTIVITY 9 – GROUP, TOTAL, OUTLINE THE EMPLOYEE AUDIT REPORT

Business Case: Teresa has been asked to enable grouping and outlining for collapsible/expandable report output.

TASK 1 – GROUP & OUTLINE

1. Still as Teresa (Tserrano), find the *WICT RW Expense Reports Lines for Date Range* report (**not** the summary version) and go into **edit** mode using related actions off the report definition.

The screenshot shows the Workday search interface with the query 'wict exp repo'. The search results list four items under 'Tasks and Reports': 'WICT RW Expense Report Lines for Date Range' (selected), 'WICT RW Expense Report Lines for Date Range Summary', 'All of Workday', and another 'WICT RW Expense Report Lines for Date Range' entry. A context menu is open over the first selected item, showing options like 'Custom Report', 'Audits', 'Calculated Field for Report', etc., with 'Edit' highlighted.

2. Under the **Columns** tab, add the “**Group Name**” field as the first field to your report.

The screenshot shows the 'Columns' tab in the report definition. It displays a table with columns for 'Sort', 'Filter', 'Subfilter', 'Prompts', and 'Output'. Under the 'Output' column, there are two rows: one for 'Expense Report Line' and one for 'Group Name'. The 'Group Name' row is highlighted, indicating it is the first field added.

3. Click **OK** to save and run the report. Use “Global Modern Services, Inc (USA)” for the company, and 01/01/2008 to 01/01/2009 for the date range. See how your sort fields are captured in your left-most Group Name column yet only showing as footer groupings.

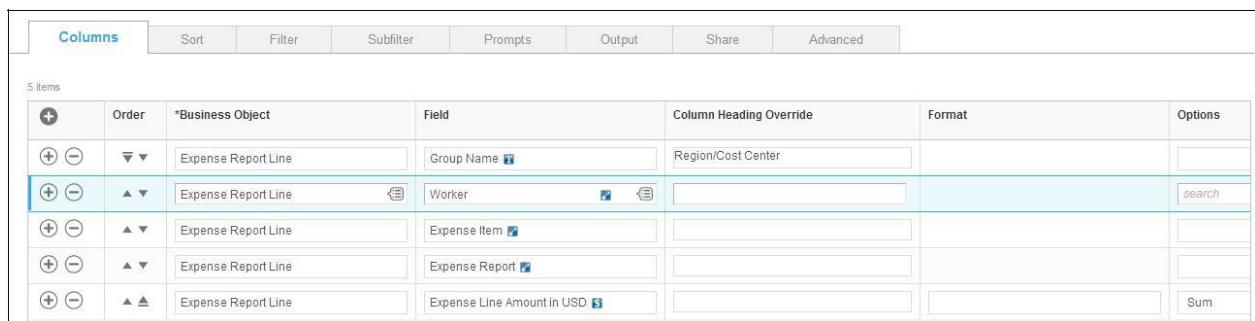
Group Name	Region	Cost Center	Worker	Expense Item	Expense Report	Expense Line Amount in USD
	US - West	71200 Field Sales - North America	Madeline Fleming		Expense Report EXP-00003372	
	US - West	71200 Field Sales - North America	Madeline Fleming	Miscellaneous	Expense Report EXP-00003372	20.00
	US - West	71200 Field Sales - North America	Madeline Fleming	Meals	Expense Report EXP-00003372	175.00
	US - West	71200 Field Sales - North America	Madeline Fleming	Meals	Expense Report EXP-00003372	65.00
	US - West	71200 Field Sales - North America	Madeline Fleming	Entertainment	Expense Report EXP-00003372	175.00
71200 Field Sales - North America		71200 Field Sales - North America				822.00
US - West	US - West					822.00
	US - Southeast	71200 Field Sales - North America	Angela Bianchi	Meals	Expense Report EXP-00003345	101.50
	US - Southeast	71200 Field Sales - North	Angela Bianchi	Car Rental & Gas	Expense Report EXP-00003345	42.50

4. Go back into **Edit** mode.

5. Under the **Columns** tab,

a. Override column label for *Group Name* field to: Region/Cost center

b. Remove the  the *Region and Cost Center* fields (since captured in the Group Name column now)



Columns							Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
5 items													
	Order	*Business Object	Field	Column Heading Override	Format	Options							
			Expense Report Line	Group Name	Region/Cost Center								
			Expense Report Line	Worker									
			Expense Report Line	Expense Item									
			Expense Report Line	Expense Report									
			Expense Report Line	Expense Line Amount in USD									

6. Under the **Sort** tab – for your sort fields, select:

a. Display Headers

b. Enable Outlining based on Grouping.

Report Writer for Workday

The screenshot shows the Report Writer for Workday interface with the 'Sort' tab selected. The 'Sort and Group' section contains two items:

- Region:** Order ▼, Field: Region, Sort Direction: Alphabetical - Descending, Display Headers: checked, Summarize Detail Rows: unchecked, Display Subtotals: checked.
- Cost Center:** Order ▲, Field: Cost Center, Sort Direction: Alphabetical - Ascending, Display Headers: checked, Summarize Detail Rows: unchecked, Display Subtotals: checked.

Below this is the 'Grouping and Totaling Options' section with the following settings:

- Enable Outlining based on Grouping: checked
- Include Group Name in Headers and Subtotals: unchecked
- Include "Total" Label in Subtotals: unchecked
- Display Grand Totals: checked

- Click **OK** to save and run your report. Use "Global Modern Services, Inc (USA)" for the company, and 01/01/2008 to 01/01/2009 for the date range.
- Try expanding (and collapsing) the groupings to get to the details of the report.

Region/Cost Center	Worker	Expense Item	Expense Report	Expense Line Amount in USD
(+) Headquarters - Corporate				61,685.97
(+) US - Central				3,786.00
(+) US - Southeast				2,160.50
US - West				
71200 Field Sales - North America				
	Madeline Fleming	Car Rental & Gas	Expense Report: EXP-00003372	55.00
	Madeline Fleming	Hotel Accommodations	Expense Report: EXP-00003372	175.00
	Madeline Fleming	Airfare	Expense Report: EXP-00003372	157.00

OPTIONAL

- Under **Sort** tab, see what happens when you select these options and run the report.
 - Include Group Name in headers and subtotals* checkbox
 - Include "Total" Label in Subtotals* checkbox
 - Enter a *Group Name Override* for your Sort fields
- Export your outlined report to Excel on your desktop to see outlining feature in Excel.
- Export your outlined report to pdf on your desktop. (End of Activity)

DATA SOURCE SECURITY & REPORT FIELD SECURITY

Workday secures every report and every data source as a securable item in a security policy. In addition some report fields within a data source may be secured separately. For example a report that uses the All Active and Terminated Workers data source might include the employee name field and the Beneficiaries field. Whoever can access the data source can access the employee name, but the Beneficiaries field is restricted to its own set of security groups. Those who can see the report, cannot see the Beneficiaries unless they are also in a security group that is authorized to do so. Another example is managers who can see their staff's names, but not their staff's Social Security numbers.

Security When Creating Reports

When you create a report as a report writer, you can only select **data sources to which you have access**. Once in the report definition, you can then only select **report fields to which you have access**. Prompts in workday will only show data sources and report fields to which the given user has access to.

What if you need access to a Data source or Report Field and don't have it?

Security in Workday is configurable. Your security administrator would need to identify the domain that the given data source or report field is in and then edit the security policy for that domain with a security group that identifies that user (or group of users). Workday's Configurable Security Fundamentals class covers how you can identify and edit security policies to configure access to secured items such as data sources and report fields.

The Data Sources report shows which security groups have access to each data source. You can click a data source to see the report fields associated with it and which security groups have access to each report field by using the related action option to "View Security" for the Report Field.

Security When Sharing Reports with others

Data source security and Report Field security also apply when sharing a custom report with others in the tenant. You can **only share a report with users that have access to the report's data source**. Once shared, those running the report will see the report results using their security.

They...

- May not see the same # of rows of output (instances), i.e. their security group access to the report fields (report columns) is 'constrained'.
- May not see the same report columns (if no security access at all to that Report Field)
- May not see the same data population, i.e. 'for whom' they see data may vary, again depending on their security group access to the given report field and constraints defined in the security group.

We will see this in an upcoming activity.

How do you know what security is needed for your report?

You can view the security for a data source or report field using related actions: Security > View Security.

This view will show the permitted security groups currently configured in the tenant for the given report field or data source. With Workday's configurable security framework, your security administrator can change the permitted security groups for given Report Fields and/or Data Sources as needed. Data sources and report fields are secured to domains, and domain security policies can be configured in your tenant with needed security group access.

Data Source Security: Workday delivers data sources secured in domains. Each domain has a domain security policy governing who has access to items in the domain. In order to have access to a data source for reporting, the user must have a security group permitted for the domain the data source is in.

Report Field Security: Workday delivers report fields secured in domains. Each domain has a domain security policy governing who has access to items in the domain. In order to have access to a report field, the user must have a security group permitted for the domain the report field is in.

Furthermore, security access can be 'constrained' for example by role-based (constrained) security groups. Using constrained security groups, a user can access the given item (e.g. data source, report field) but they will only see instances allowed in the constraint for that item. "For whom" they see data is constrained. For example, managers in separate organizations might each run the same Employee Report that uses the same data source and fields, but may each see instances only of employees in their respective organizations. We will see this 'constraint' using role-based security groups and data sources in an upcoming activity.

SHARING REPORTS

By default, a custom report is not shared and is visible only to its owner (and to Report Administrators with central access to manage all custom reports). Report owners can share a report with other authorized Workday users or groups. Authorized Workday users or security groups include permitted security groups for your report's **Data Source**.

Sharing information is defined under the Share tab. Report Writers can share with:

- **All Authorized Users**, i.e., any user in a permitted security group the report's data source
- **Specific Authorized Groups**, i.e. specific security groups permitted for the report's data source
- **Specific Users**, i.e. specific users with security groups permitted for the report's data source

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
---------	------	--------	-----------	---------	--------	--------------	----------

Specify sharing options for the report definition

Report Definition Sharing Options

Don't share report definition
 Share with all authorized users
 Share with specific authorized groups and users

Report Owned by Imcneil / Logan McNeil

You can further configure who (which report writer) can select which sharing option, by configuring security in Workday to the following domains. By default, the Report Writer security group will have access to all of these domains meaning any report writer can select any sharing option.

- **Domain:** "Report Definition Sharing with Specific Users"
- **Domain:** "Report Definition Sharing with Specific Groups"
- **Domain:** "Report Definition Sharing with All Authorized Users"

For more information on how to configure security, please see Workday training on Configurable Security.

Once shared, authorized users or groups will be able to see the report in the tenant, and then run or schedule the report. As each shared user runs the shared report, his or her security will be used to determine the report output.

If the authorized user or group is also a report writer in the tenant, i.e. has access to the Domain: Custom Report Creation, he/she can then also access the report definition and copy the custom report shared with them.



ACTIVITY 10 – MODIFY SHARE

Business Case: Logan McNeil has been asked to share the WICT RW Employee Audit report with the Manager security group.

TASK 1 – COPY A CUSTOM REPORT IN TENANT

1. Logout as Teresa and log back in as logan (lmcneil)
2. From the search box, search for a report called: WDINST Employee Audit
3. Using related actions off the report definition, select Custom Report > Copy

The screenshot shows a Workday search results page with a blue header bar containing the text 'wdinst empl aud'. Below the header, there's a sidebar with sections like 'Search Results' (2 items), 'Tasks and Reports', and 'All of Workday'. The main content area shows a list of reports under 'Tasks and Reports', with one item named 'WDINST RW Employee Audit'. A context menu is open over this report, titled 'Custom Report'. The menu contains several options: 'Edit', 'Run History', 'Copy' (which is highlighted in blue), 'Maintain Excel Template', 'Run', 'Schedule', 'Test', 'Transfer Ownership', 'Translate', and 'Delete'. The background of the menu is white, and the text is black, except for the highlighted 'Copy' option which is blue.

4. Rename the report using our class prefix: *WICT RW Employee Audit* and click OK.
5. Note the report's PBO (Employee) and Data source (All Active Employees).
6. Review the fields included in the report under the **Columns** tab.
7. Review the **Sort** tab configuration.
8. Review the **Share** tab – see how the report is not shared.
9. Click OK to save the report.

TASK 2 TEST JACK'S ACCESS TO LOGAN'S CUSTOM REPORT

➡ **Sign in as Jack Taylor (jtaylor)**

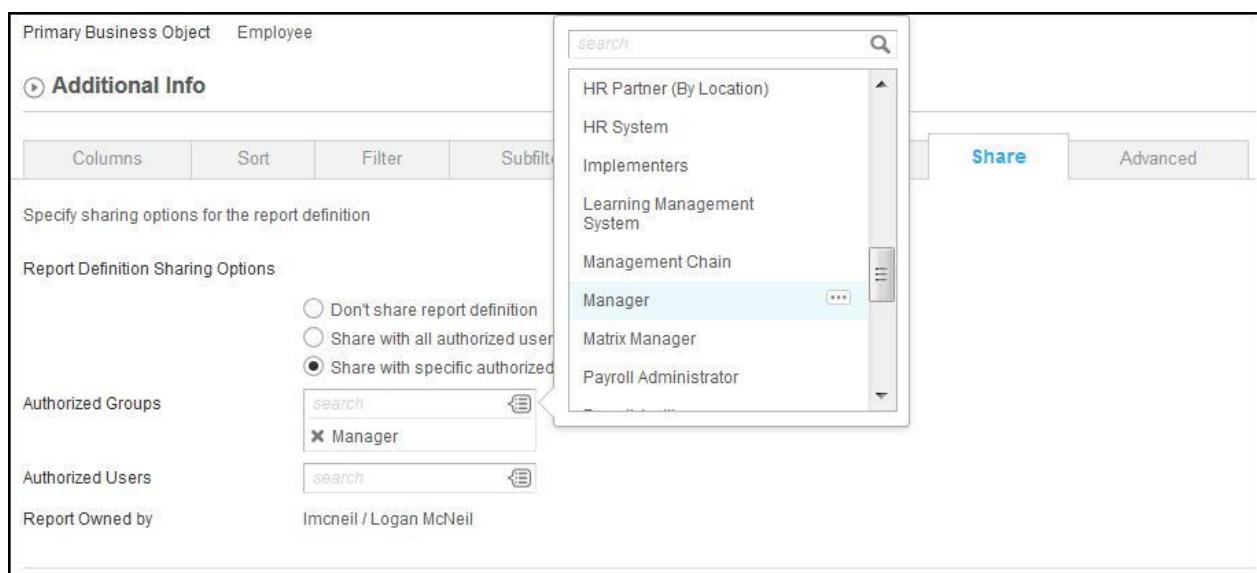
1. Jack is the Manager of the IT HelpDesk Department and has 4 direct reports (click on his My Team worklet. He has 2 Active Employees and 2 Contingent Workers on his team).
2. From the search box, search for *WICT* or *WICT Employee Audit*

3. Note, how Jack does not get any results. He does not have access to Logan's *WICT RW Employee Audit* report in the tenant as Logan's report is not shared.
4. Signout as Jack

TASK 3 SHARE REPORT (AND ADD HELP TEXT)

Sign in as Logan McNeil (Imcneil)

1. From the Search Box, search for *WICT* or *WICT Employee Audit*
2. Using the related actions off your report definition, select **Custom Report > Edit**
3. Click on the **Share** tab
 - a. Select *Share with specific authorized groups and users.*
 - b. Under Authorized Groups, select the **Manager** group. Note this list of authorized security groups represents the permitted security groups for the report's data source.



4. While still in **edit** mode, click on the **Output** tab, expand the **Help Text** section, and add some help text in the *Brief Description* for those that can now see and run the report

Manager report – auditing information for active employees (e.g. hire, pay, etc.)

Report Writer for Workday

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Specify output options for the report							
Output Type							
Output Type * <input type="text" value="Table"/> <input type="button" value="▼"/>							
<input checked="" type="radio"/> Chart Options							
<input checked="" type="radio"/> Gauge Options							
<input checked="" type="radio"/> Worklet Options							
<input type="radio"/> Help Text							
Brief Description	<input type="text" value="Manager report – auditing information for active employees (e.g. hire, pay, etc.)"/>						
More Info	<input type="text"/>						

5. Click **OK** to save and Signout.

TASK 3 - TEST JACK'S ACCESS TO REPORT

Sign in as Jack Taylor (jtaylor)

1. From the search box, search for the report *WICT RW Employee Audit*.
2. Jack can now see this report in the tenant since Logan (the report owner) shared it with a security group (Manager) that Jack is a member of. See how the report help text will also show in search results.

The screenshot shows the Workday search interface. A search bar at the top contains the query "wict emp aud". To the right is the Workday logo. Below the search bar, the results are displayed under the heading "Search Results: 2 items". The results are categorized into "Tasks and Reports" and "Common". Under "Tasks and Reports", there is one result: "WICT RW Employee Audit" with the description "Manager report – auditing information for active employees (e.g. hire, pay, etc.)". Under "Common", there is another result: "WICT RW Employee Audit" with the same description and "Report Definition" link.

3. Run the report by clicking on the report under **Tasks and Reports** and view results as Jack.
 - a. Note how Jack doesn't see all the report columns as Logan had defined in the report (missing: Date of Birth and Emergency Contacts)

- b. Note how for the columns he does see, he doesn't see data populated in all cases. "For whom" he sees data is driven by his security profile (which is different than Logan's)

Worker	Supervisory Organization	Location	Total Base Pay Annualized in USD - Amount	Hire Date	Manager - Level 01	Social Security Number - Formatted
Jan Smit	Field Sales - EMEA Group	Amsterdam	0		Camilla Stewart	<Blanks>
Lotte Bakker	Global Support - Benelux Group	Amsterdam	0		Hans Visser ...	322-04-4822
Gerard Morgen	Global Support - Benelux Group	Amsterdam	0		Hans Visser	
Hans Visser	Global Support - EMEA Group	Amsterdam	0		Katarina Lindgren	
Edgar De Graff	Regional Facilities Department	Amsterdam	0		Oscar Bell	
Melissa Hartman	Corporate Accounting	Atlanta	0		Sara Goldstein	
Brandon Harris	Field Sales - North America Group	Atlanta	0		Angela Bianchi	

4. What changes would you need to make to this report so that it would be more useful?
- a. We will change the data source in the next activity to prompt on organization so each Manager can only see data for their organization.
5. You can also see the help text using related actions off the report definition under the Brief Description.

WDINST RW Employee Audit		Available Actions		Custom Report	
59 items		Custom Report	Favorite	Brief Description	Manager report – auditing information for active employees (e.g. hire, pay, etc.)
Location/Sup Org	Worker	Process	Reporting	Data Source	All Active Employees
(+) Company				Primary Business Object	Employee
(+) Chicago				Web Service	
(+) Copenhagen					

TASK 4 – ANOTHER TEST – BETTY'S ACCESS TO REPORT

⌚ Sign in as Betty Liu (bliu) (Betty is the Manager of the Payroll department)

1. Search for the report *WICT RW Employee Audit* and run it; view results.
2. Discuss results; note how Betty sees more data than Jack (so has more security permissions than Jack).
 - a. She still doesn't see the *Emergency Contacts* column, though does see *Date of Birth*.
 - b. She sees more data populated for fields than Jack "for whom" she can see data for, but still not the same as Logan did.

(OPTIONAL) TASK 5 - COPY THE REPORT DEFINITION

- Both Betty and Jack have access to the *Custom Report Creation* domain and can therefore create/edit/view custom reports in the tenant as well.
- Now that Logan's report is shared with them, they can now not only run the report, but they can also copy the report definition.
- As Betty or Jack, try copying Logan's shared report definition. (Note how they cannot edit it directly, but can copy it).

- When Betty tries to copy and save Logan's report definition, she gets an **error** around the **Emergency Contacts** Report Field. (**Tip:** click on the magnifying glass icon in the error message to have it take you to the problem field)
 - Since Betty does not have access to this Report Field (remember the column was missing from her report output when she ran the report), she cannot save the report definition with it.
 - Remove the **Emergency Contacts** Report Field and save a copy of the report definition as Betty.

- When Jack tries to copy Logan's report definition, he will get an error around the Date of Birth and Emergency Contacts report fields given he does not have access to both of those fields. He will have to remove those report fields before he can save the copy of the report.

(End of Activity)



ACTIVITY 11 – MODIFY DATA SOURCE

Business Case: Managers only want to see their own Supervisory Organization's members. Let's modify this report's data source to prompt the user for an organization. Here is an example of how a Data Source can also drive report security with its built-in prompts.

TASK 1 – CHANGE REPORT DATA SOURCE

⌚ Sign in as Logan McNeil (lmcneil)

1. Search for and find the *WICT RW Employee Audit* report.
2. Use the Related Action icon next to the *WICT RW Employee Audit* report definition, select **Custom Report > Edit**.
3. Change the Data Source to **Employees by Organization**.
4. What prompts will be brought in as a result of choosing this data source? (Hint: use the related action to preview the data source details.)

Please list them: _____

5. Save the report and sign out.

TASK 2 – TEST REPORT AS JACK TAYLOR

⌚ Sign in as Jack Taylor (jtaylor)

1. Find the *WICT RW Employee Audit* report and run the report.
2. What is the only available organization you can use as a prompt? _____
3. Run report for the only available Organization and check the box to **Include Managers** and **Include Subordinate Organizations**.
4. Because the *Include Managers* checkbox is selected, Jack Taylor's information will show in the report as well as he is the Manager of the IT HelpDesk Department.

WICT RW Employee Audit ...										
Include Subordinate Organizations: Yes			Include Managers: Yes							
Organization: IT HelpDesk Department										
3 items										
Worker	Supervisory Organization	Location	Total Base Pay Annualized in USD - Amount	Hire Date	Manager - Level 01	Social Security Number - Formatted				
Jeff Gordon	IT HelpDesk Department	Dallas	\$62,459.66	01/01/2000	Jack Taylor					
Jared Ellis	IT HelpDesk Department	Dallas	\$60,936.25	01/01/2000	Jack Taylor					
Jack Taylor	IT Services Group	Dallas	0	01/01/2000	Anthony Rizzo	322-04-4822				

Question: The report now is better targeted to only show data for relevant organizations that the user manages or supports. However, Jack still cannot see data for all the report columns. Why can he not see Social Security Number information for his direct reports?

Answer: Jack's Report Field access to the Social Security report field is constrained to 'employee-as-self' so he can only see Social Security info for himself.

TASK 3 - CONFIGURE THE BUILT-IN DATA SOURCE PROMPTS

As you saw in this activity, the *Employees by Organization* data source has built-in prompts. Let's configure these built-in prompts with default values to save us some data entry at report runtime.

Sign in as Logan McNeil (lmcneil)

1. Go back into Edit mode for your *WICT RW Employee Audit* report
2. Activate the **Prompts** tab
 - a. Configure the **Prompt Instructions** "Please select an organization. Subordinate Organizations and Managers will be included by default."
 - b. Add **Prompt Defaults** as below:
 - i. **Field: Include Managers**
 - ii. Default Type: Specify Default Value
 - iii. Default Value: Yes (checked)
 - iv. Do not Prompt At Runtime: Yes (checked)
 - v. **Field: Include Subordinate Organizations**
 - vi. Default Type: Specify Default Value
 - vii. Default Value: Yes (checked)
 - viii. Do not Prompt At Runtime: Yes (checked)

Specify the prompt defaults that should be used

Prompt Instructions

Instructions Please select an organization. Subordinate Organizations and Managers will be included by default

Runtime Date Prompts

Effective Date * Use date and time at r ... ▾

Entry Date * Use date and time at r ... ▾

Prompt Defaults 2 items

Order	*Field	Prompt Qualifier	Label for Prompt	*Default Type	Default Value	Required	Do Not Prompt at Runtime	Do Not Include in Subtitle
1	Include Managers			Specify default value	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Include Subordinate O... ▾			Specify default value	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

3. Click OK to save your report.
4. Now re-run the report and see the built-in data source prompt now defaulting for all who run the report. (End of Activity)

WDINST RW Employee Audit

Instructions Please select an organization. Subordinate Organizations and Managers will be included by default

Organization *

- My Favorites ►
- My Organizations ►
- Organizations by Type ►
- Organizations ►

PROXY ACCESS TESTING REPORTS

In non-production environments, you can use the 'proxy access' feature in Workday to test your reports 'as other users'. Please see 'proxy access' in Workday for more information.

The screenshot shows the Workday interface with a search bar at the top containing "proxy access". Below the search bar, there are two main sections: "Categories" and "Search Results".

Categories:

- Common: Tasks and Reports
- Assets: View Proxy Access Policy
- Banking: Edit Proxy Access Policy
- Expenses: Create Proxy Access Policy
- Financial Accounting: Delete Proxy Access Policy

Search Results:

5 items found:

- Tasks and Reports
- View Proxy Access Policy
- Edit Proxy Access Policy
- Create Proxy Access Policy
- Delete Proxy Access Policy

View Proxy Access Policy

Proxy Access Policy: [Search icon]

Restricted to Environment: Pre-Production

Do Not Allow Proxy on Behalf Of: (empty)

Groups That Can Proxy	On Behalf Of
Finance Administrator	All Users
HR Administrator	
Report Administrator	
Security Administrator	

Start Proxy for Worker

Authenticated As: Logan McNeil

Act As:

On behalf of: Jack Taylor

Stop Proxy

Confirm

The screenshot shows the "Start Proxy for Worker" dialog and the user profile for "Jack Taylor". The profile includes details such as "Manager, IT HelpDesk Employee", "Pre-Hire", "61120 IT HelpDesk Cost Center", "IT HelpDesk Department Supervisory Organization", and "Manager, IT HelpDesk - Job Position". To the right of the profile, a sidebar menu is open with various options for managing the worker's account and proxy access.

Jack Taylor
Manager, IT HelpDesk Employee
Pre-Hire
61120 IT HelpDesk Cost Center
IT HelpDesk Department Supervisory Organization
Manager, IT HelpDesk - Job Position

- All of Workday
- Talent
- Time and Leave
- Workday Account
- Worker History
- Audits
- Favorite
- Integration IDs
- Preferences
- Reporting
- Security Profile
- View Workday Account
- Edit Workday Account
- Assign Roles
- Assign User-Based Groups
- Manage Workday Account Credentials
- Start Proxy
- View Custom Reports
- View Role Assignments
- View Security Groups
- Security History for Worker
- View Signon History
- View Support Roles
- View Update Audit

LOCATING CUSTOM REPORTS

As you create custom reports and share custom reports across your user base in your tenant, it will be important to organize and configure your reports to be easily found and accessed by users.

Locating custom reports can be done and configured in the tenant several ways:

SEARCH BOX

- Enter the name of the report to find and run
- Use the **rd:** search prefix to find the report definition
- If configured, the help text of the report (Brief Description) will show in search results.

The screenshot shows the Workday search interface. In the top navigation bar, there is a search bar containing "wict train repor". On the left, there is a sidebar with categories: Common, Assets, Banking, Expenses, Financial Accounting, Integrations, Organizations, and Payroll. The main area is titled "Search Results 3 items" and contains two entries under "Tasks and Reports": "WICT RW Training Report 1" and "WICT RW Employee Audit". Both entries have brief descriptions. Below these, there is a section titled "All of Workday" which also lists "WICT RW Training Report 1" with its own description and a link to "Report Definition".

FAVORITES

- You can mark a custom report as a favorite for easy retrieval.
- Shared Custom Reports can be found under Favorites

The screenshot shows the Workday Favorites page. On the left, there is a sidebar with various links: All About Me, My Team, Workbench, My Workday 2.0, Dashboards, Sitemap, Favorites, Audit, W:Drive, and Documentation. The main area is titled "Tasks" and has a search bar with "wd empl aud". Below the search bar, there is a message: "me. To start a task, click the task name." There are several tables with columns: Favorite Tasks, Favorite Reports, Favorite Custom Reports, Custom Reports, and Shared Custom Reports. The "Shared Custom Reports" column is highlighted with an orange oval. It lists numerous reports such as Account Balance Data, Additional Reviewer Comments, Alert - Anniversaries for this week and next, Alert - Birthdays for this week and next, Alert - Employee PTO Review, Alert - Missing Project Timesheets, Alert - Missing Time Tracking Timesheet for Hourly Workers, Alert - Overdue Business Process Tasks, Alert - Segregation of Duties Exceptions, Alert - Which employees have certifications expiring in the next 6 months?, and More (346).

ADD CUSTOM REPORTS TO SITEMAP REPORT CATEGORIES

Custom Reports can be integrated into Workday's Sitemap of reports and tasks using the **Maintain Custom Reports on Menu** task. Users with access to the **Custom Report Administration** domain can run the **Maintain Custom Reports on Menu** task to associate a custom report with a Sitemap category.

Maintain Custom Reports on Menus

Adds and removes a custom report to the Sitemap and related actions menu. Only custom reports that prompt for a business object can be added to the Sitemap.

Custom Reports on Menus 17 items

	*Custom Report	Sitemap Category	Business Object
<input type="button" value="+"/>	All Jobs	<input type="text" value="search"/> <input type="button" value="refresh"/> <input checked="" type="checkbox"/> Jobs & Positions	report My Personal Data My Preferences Organization Goals Organizations Payroll Interface Payroll Processing/Results Payroll Worker Data Period Activity Pay Personal Data
<input type="button" value="-"/>	Compare Candidates by Succession Plan		
<input type="button" value="-"/>	Employee Timeline	Worker Data History	
<input type="button" value="-"/>	Notes for a Customer	Customer Accounts	
<input type="button" value="-"/>	Print Employee Job History Profile		
<input type="button" value="-"/>	Print Project Gantt Chart	Projects	
<input type="button" value="-"/>	Project Reported Time by Worker	Projects	

Once configured, custom reports will show in the Sitemap Category along with delivered reports.

Available Reports and Tasks

To view a report, click the report name. To start a task, click the task name.

<input type="checkbox"/> Integration History	Reports	All Jobs
<input type="checkbox"/> Job Change		Audit Work Hours Profiles
<input checked="" type="checkbox"/> Jobs & Positions		Default Hours for Worker Audit
<input type="checkbox"/> Manage Work		Job History
<input type="checkbox"/> My Personal Data		Position Restrictions as of Date
<input type="checkbox"/> My Preferences		View Position Restrictions
<input type="checkbox"/> My Workday Account		

ADD CUSTOM REPORTS AS RELATED ACTIONS

Custom Reports can be configured as related action options for a given object if the custom report prompts on that object.

The **Maintain Custom Reports on Menu** task allows you to configure the custom report as a related action. Users with access to the **Custom Report Administration** domain can run the **Maintain Custom Reports on Menu** task to configure a custom report as a related action for a given object.

- To associate a custom report with a related actions, the report:
 - Must have a prompt defined for the associated business object.
 - Can be associated with only one business object and in only one related action category.

Maintain Custom Reports on Menus					
Adds and removes a custom report to the Sitemap and related actions menu. Only custom reports that prompt for a business object can be added to a related actions menu.					
Custom Reports on Menus 17 items					
+ *Custom Report					
Business Object	Sitemap Category	Related Actions			
All Jobs	Jobs & Positions	Worker	Reports	Worker <input checked="" type="checkbox"/>	Default Prompt
Compare Candidates by Succession Plan		Succession Plan	Reports	Succession Plan <input checked="" type="checkbox"/>	Default Prompt
Employee Timeline	search	Employee <input checked="" type="checkbox"/>	Reports	Employee	
Notes for a Customer	Customer Accounts	Customer	Reports	Customer <input checked="" type="checkbox"/>	Default Prompt

For example, Logan can run 2 reports as related actions off a worker's profile.

The screenshot shows the Workday interface for a worker named Adam Carlton. On the left, there is a sidebar with navigation links like Personal, Compensation, and Payroll. The main area displays Adam's contact information (Phone: +1 (617) 944-6659, Email: acarlton@workday.net) and his work address (545 Tremont Street, Boston, MA 02116, United States of America). Below this, there are sections for Instant Messenger (acarlton) and Social Network (links to Facebook, Google+, LinkedIn, and Twitter). At the bottom of the main area, there is a list of related actions: All Jobs, Employee Timeline, and Employee Data History. The 'Employee Timeline' item is highlighted with an orange box.



ACTIVITY 12 – OPTIONAL - ADD CUSTOM REPORTS TO MENUS AND AS RELATED ACTIONS

MAKE REPORT AVAILABLE ON MENU

1. Search for and run the **Maintain Custom Reports on Menu** task.
2. Click the icon to add a row into the grid.
 - a. In the Custom Report field, select **WICT RW Employee Audit**.
 - b. In the Sitemap Category, select **Staffing Reports**.
 - c. Under the Related Actions options, select:
 - i. Business Object: Organization
 - ii. Menu Category: Reports

Maintain Custom Reports on Menus					
Adds and removes a custom report to the Sitemap and related actions menu. Only custom reports that prompt for a business object can be added to a related actions menu.					
Custom Reports on Menus 18 items					
	*Custom Report	Sitemap Category	Business Object	Menu Category	Related Actions
(+)	WDINST RW Empl ...	search	Organization	Reports	Prompt Field Organization Prompt Qualifier
(-)	WDINST RW Empl ...	x Staffing Reports			

3. Click **OK** then **Done**.
4. Click on the Sitemap, Staffing Reports Category, and expand to see your custom report.

The screenshot shows the Workday interface with the 'Maintain Custom Report on Menus' task open. The 'Reports' category under 'Sitemap' is expanded, displaying a list of various reports. An orange arrow points to the 'WICT RW Employee Audit' report at the bottom of the list.

5. Now search for an organization. From the search box, enter **org: Payroll Dept**
6. Using related actions for the organization, select Reports to see your custom report now configured as a related action option. Run the report and see how it executes for the given organization. (End of Activity)

The screenshot shows the Workday interface with a search bar at the top containing 'org: payroll'. The search results are displayed under the 'Common' category. The results include:

- Payroll Department** (Supervisory Organization)
- 41200 Payroll** (Cost Center)
- Payroll** (Custom Organization)
- Third Party - Green Plane** (Pay Group)
- Benefits** (Custom Organization)

A tip message 'Tip: try selecting another category' is visible near the bottom of the search results.

To the right of the search results, there is a summary card for the **Supervisory Organization Payroll Department**. The card displays the following details:

Supervisory Organization	Organization Type	Supervisory	
Additional Data	Manager	Betty Liu	
Audits	Business Process	Total Headcount	6
Budget Details	Candidate	Superior	Human Resources
Business Process	Compensation	External URL	Supervisory Website
Candidate	Compensation Review Process	Primary Location	San Francisco
Compensation	Hire		
Compensation Review Process	Integration IDs		
Favorite	Job Change		
Headcount Plan Template	Organization		
Hierarchy Structure	Reorganization		
Hire	Reporting		
Integration IDs	Reports		

An 'Org Chart' button is located next to the summary card.

Below the summary card, a box contains the following reports:

- Current Employee Detail Report
- Management Hierarchy Report
- Worker Change History Report
- WDINST RW Employee Audit** (highlighted with an orange arrow)

PROFILE GROUPS

Custom Reports can be added to **Workday Profile groups**, like the Worker Profile shown below. The *Employee Compensation Analysis* is a Custom Report, added to the Worker Profile/Compensation view. See the **Configure Profile Group** task for more info.

WORKLETS

Custom Reports can also be located in the tenant via **Worklets**.

Worklets are visual ‘tiles’ enabled on landing pages or dashboards for frequently used and easily accessed reports. Instead of finding the report to run it, the report is shown as a visual tile with output ready to view.

My Workday 2.0

People Management Metrics

Executive	% of Top Talent Hired	Turnover %	FI
Jake Lee	0%	2%	
Logan McNeil	5%	0%	
Maximilian Schneider	32%	3%	
Oliver Reynolds	3%	11% ↑	▲
Teresa Serrano	4%	0% ▲	

Headcount by Country

Country	Headcount
Country A	162
Country B	18
Country C	35
Country D	22
Country E	9
Country F	6
Country G	7
Country H	5

Performance by Potential/Agility

Potential/Agility	Workers	Contributors	Consistent St..
Perfor. Exceeds	2	75	28
Meets	16	83	16
Below	9	15	2
Detractors	9	15	2
Placeholder	16	66	Latents
Total	312		

My Team's Worker Spend

Goals with Supporting Initiatives

Goal	Supporting Initiatives			
	Initiative	Cost	% Complete	# o
Improve Brand Awareness Globally	Brand Awareness	\$2,870,566	60%	
Increase billable hours by 20%	Customer Success	\$1,110,159	70%	
Reduce IT Spend by 15%	Continuous Improvement	\$480,651	0%	
	Operational Excellence	\$0	40%	
Reduce time to market by 10%	Emerging Products	\$3,500,004	60%	

My Team's Worker Spend

Department	Spend (USD)
Recruiting Department	102,080
HR Services Department	18,080

Total for Spend (USD): 120,100

My Organizations

Organization	Spend (USD)
Recruiting Department	102,080
HR Services Department	18,080

REPORT TAGS

You can locate custom reports (as well as locate scheduled report output files) using **Report Tags**. Report tags allow a user to categorize custom reports, as well as tag scheduled report output files for ease of retrieval.

Examples of report tags might be "Compensation Reports", "Benefit Reports", or "Management Reports". A given custom report or scheduled report output file can be associated with more than one report tag.

When editing a custom report definition, you can select from any existing report tags defined in the tenant.

Note: You will only see the *Create* option in the prompt if you have security group access to the **Report Tag Management** domain.

The screenshot shows the 'Edit Custom Report' page for a report titled 'How are employees paid?'. On the left, there are fields for 'Report Name' (set to 'How are employees paid?'), 'Report Type' (set to 'Matrix'), 'Data Source' (set to 'All Active and Termi...'), and 'Data Source Type' (set to 'Standard'). To the right of these fields is a 'Report Tags' section. It contains a search bar, a list of existing tags ('Global Payroll', 'Payroll', 'Payroll Data Guide'), and a 'Create' button which is highlighted with an orange border. Below the list is a 'search' field.

The ability to create and maintain report tags will be dependent on your security. Those with access to the **Report Tag Management** domain will have the ability to create and maintain report tags in the tenant. Use the **View Report Tags** or **Maintain Report Tags** tasks to view and maintain your list of report tags in the tenant.

Once report tags are defined and associated with a custom report, users can enter the report tag name in the search box to locate all reports associated with the tag. Note, users will only see reports associated with the report tag that they have access to (i.e. have been shared with them or that they own).

Below is an example of a user entering the report tag "*Payroll Data Guide*" and seeing the resulting list of reports that have been tagged as such and that the user has access to run.

The screenshot shows the Workday search results for the tag 'payroll data guide'. On the left, there is a sidebar with 'Categories' including 'Common', 'Assets', 'Banking', 'Expenses', 'Financial Accounting', 'Integrations', and 'Organizations'. The 'Common' category is selected and highlighted in blue. On the right, the 'Search Results' section displays 16 items under the heading 'Tasks and Reports'. The results are as follows:

Search Results	16 items
Tasks and Reports	Which employees are hourly?
	Which employees live in one state but work in another (multi-state reciprocity)?
	How are employees paid?
	Which employees have withholding orders?
	Which employees have gross-up earnings payroll data?
	Which employees have third party sick pay?

You can also use the search prefix **rdt:** to search for **report definitions** by tag.

The screenshot shows the Workday Report Writer interface. At the top, there is a search bar containing the query "rdt: payroll data guide". To the right of the search bar is the Workday logo. On the left, there is a sidebar titled "Categories" with a section for "Common" which is currently selected. The main area is titled "Search Results 16 items" and contains a list of 16 report definitions, each with a title, a brief description, and a "Report" link. One item, "Which employees are hourly?", has a "Related Actions and Preview" button next to it. The list includes:

Category	Report Definition
Common	Common
Assets	How are employees paid? ...
Banking	Report
Expenses	Which employees are hourly? Related Actions and Preview
Financial Accounting	Report
Integrations	Which employees live in one state but work in another (multi-state reciprocity)?
Organizations	Report
Payroll	Which employees have withholding orders?
People	Report
Processes	Which employees have gross-up earnings payroll data?
	Which employees have third party sick pay?
	Report



ACTIVITY 13 - ADD REPORT TAGS TO CUSTOM REPORTS

CREATE A REPORT TAG AND ASSOCIATE WITH 2 OF YOUR CUSTOM REPORTS

Sign in as Logan McNeil (lmcneil)

1. Edit the **WICT RW Employee Audit** report
2. Click the **Report Tags** prompt and select **Create > Create Report Tag**. Note: Logan has access to the *Report Tag Management* domain allowing her to create tags.

3. Enter **Training Reports** as the name of your new Custom Report Tag and click **OK**.
4. Click **OK** to save the change to the report.
5. Now edit another report from an earlier activity: **WICT RW Training Report 1**
6. Click the **Report Tags** prompt.
7. Select the *Training Reports* tag you just created.
8. Click **OK** to save the change to the report.
9. As Logan, test pulling up the 2 report definitions using the **rdt:** prefix. Search for the string *rdt: Training Reports*. Note the reports that result.

Categories	Search Results
Common	2 items
Assets	WICT RW Employee Audit Manager report – auditing information for active employees (e.g. hire, pay, etc.) Report Definition
Banking	
Expenses	WICT RW Training Report 1 This is the report brief description/help text. Will show in search results and preview of report. Report Definition
Financial Accounting	
Integrations	
Organizations	Tip: try selecting another category from the left to see other results

 **Sign in as Jack Taylor (jtaylor)**

1. As Jack, enter the *Training Reports* custom report tag in the search box as shown to locate the training reports that Logan tagged.

- i. **Change Jack's search category from Common to Reporting or All of Workday.** Results should be returned. Jack, only sees the *WICT RW Employee Audit* report. Why? The *WICT RW Training Report 1* was not shared with him.

When using reports tags to retrieve custom reports, users will only see reports of a given tag that are shared with them.

(End of Activity)



ACTIVITY 14 - TRACK CUSTOM REPORTS

RUN A DELIVERED REPORT TO TRACK ALL CUSTOM REPORTS IN TENANT

➊ Sign in as Logan McNeil (lmcneil)

1. From the search box, run **Workday Standard Reports**
2. For the report category, select *Report Writer* and *Report Writer: Critical (Audits)*



3. Click OK.
4. Note the delivered reports and descriptions.
5. Using related actions, run the **All Custom Reports** delivered report.

6. Review the report output and see the information reported on for each custom report in the tenant, from who owns what report, to whether a report is shared or how it's tagged.
7. Lastly, note that this delivered report can be copied to custom, if you want to make any changes to the definition.

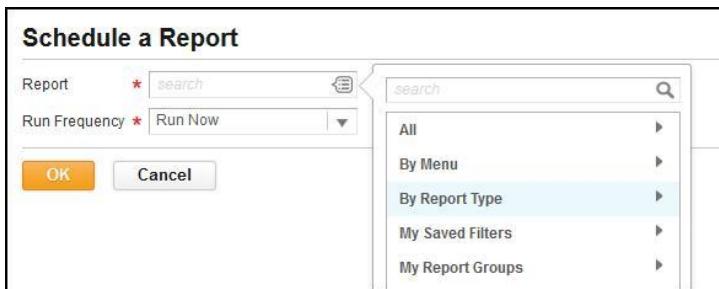
All Custom Reports														
Custom Report	Report Type	Data Source	Available Actions											
			Copy	Run	Schedule	User	Description	Created On	Last Updated	Last Run Date	Last Run By	Number of Times Executed in Last 6 Months	Worklet	Output Type
1099 Data Audit - Ad Hoc	Advanced	Ad Hoc Payment				tserrano / Teresa S		02/28/2013 01:18:15.821 PM	06/13/2013 04:12:27.956 PM	06/13/2013 04:12:34.930 PM	tserrano / Teresa Serrano	0	No	Table

(End of Activity)

SCHEDULE AND SHARE OUTPUT OF REPORT

You can schedule a report or a report group (specific to Workday Financials where you can group multiple financial reports to run as a single unit) so that you don't need to manually run a given report each time. For example, by setting up a recurring process, you can automatically run a weekly report each Friday at 6 PM. When you schedule a report or report group, it runs in the background, which allows you to continue your work while the report or report group is running.

When selecting what Report or Report Group to schedule, you can also select your report by "My Saved Filters" for reports where you have enabled and defined saved filters to be used for the prompts.



RUN FREQUENCY

You can schedule a report or report group to run immediately, one time in the future (for example, 8 PM tonight), or on a recurring basis (for example, daily, weekly, or monthly).

Examples:

Run Every Other Friday: Run Frequency = Weekly, Recurs Every x Week(s) = 2, Day(s) of the Week = Friday

Run Monthly on the 1st and 15th: Run Frequency = Monthly, Month(s) = Every Month, Recurrence Type = Day(s) of the Month: 1st, 15th

Run on the Last Friday of Every Month: Run Frequency = Monthly, Month(s) = Every Month, Recurrence Type = Day of the Week: Last Friday

Run on the Last Day of Each Calendar Quarter: Run Frequency = Monthly, Month(s) = March, June, September, December, Recurrence Type = Day(s) of the Month: Last Day of the Month

Note: If setting up a recurring schedule, **the maximum schedule end date you can configure is Dec 31st of the following calendar year + 5 occurrences**. So for example, if a *monthly* schedule is setup in 2013, the maximum schedule end date you can configure would be Dec 31, 2014 and the report would then run 5 more *months* (5 more occurrences) after this end date, with last run being in May 2015. If however a *daily* schedule was setup in 2013, the maximum schedule end date would again be Dec 31, 2014, with the report schedule running 5 more *days* after the end date, with the last run being on Jan 5, 2015. So the maximum schedule you can setup is the last day of the following calendar year + 5 occurrences, where occurrences = defined schedule frequency (daily, monthly, etc.).

If you have defined a recurring schedule, you will be notified by email 2 occurrences before it ends. See Edit Tenant Setup – Business Processes & Notifications to enable or disable this notification.

OUTPUT

Scheduled reports run in the background and are output to **Excel or PDF in Workday**. Once you submit the report to run in the background, you do not need to stay logged in to Workday for it to run. When the report is completed, its output is stored on the W:Drive (Workday's virtual drive) and is only accessible within the Workday system.

Scheduled Report Output files can be associated with **Report Tags** and these Report Tags can be used for ease of retrieval using the **My Report Output Files** task or **My Reports** task. Scheduled report the output files can only be kept in Workday for a max of 365 days.

The screenshot shows the 'Output' tab of the Workday Report Writer dialog box. The tabs at the top are 'Report Criteria', 'Schedule', 'Output' (which is selected), and 'Share'. The 'Output Type' section contains two radio buttons: 'Excel' (unselected) and 'Report (PDF)' (selected). Below this is a 'Report Tags' section with a search bar containing 'Training Reports' and a checkbox labeled 'Do Not Output an Empty Report' which is checked. A field 'File to be Deleted After (Days)' with a value of '5' has a red asterisk next to it, indicating it is a required field. At the bottom are 'OK' and 'Cancel' buttons, with 'OK' being highlighted.

Report tags for scheduled report output files can be Static or Dynamic. Dynamic report output tags apply to Financials/Report Groups that prompt on, for example, Company. Static tags can be defined and maintained via the **Maintain Report Tags** task by those with permissions to the *Report Tag Management* domain.

SHARING OUTPUT

When you schedule a report to run in the Workday system, authorized users can share the output of their scheduled report with others. Only users with access to the **Report Output Sharing** domain have the ability to share scheduled report output with others and can see the Share tab when scheduling a report. There is also a User-based Security Group, **Report Output Sharing** that has permissions to this domain allowing users to share the output of a scheduled report.

When sharing the output of a scheduled report, you can share it with specified users and/or unconstrained security groups. Unconstrained security groups such as user-based security groups can group report recipients similar to a report distribution list. The maximum number of users you can share the output with is **2000**.

The screenshot shows the 'Share' tab of the Report Output Sharing dialog box. The tab bar includes 'Report Criteria', 'Schedule', 'Output', and 'Share'. The 'Share' tab is active, indicated by a blue background and white text. Below the tabs, a note reads: 'Specify the sharing options for the report output. Note that selecting "Share report output with other users" will make your report output available to anyone with access to the Report Output Sharing domain.' Under 'Report Output Sharing Options', there are two radio buttons: 'Don't share report output' (unselected) and 'Share report output with other users' (selected). The 'Authorized Users' section contains a search field with 'Jack Taylor (jtaylor)' listed. The 'Security Groups' section contains a search field with 'Payroll Administrator' listed. A checkbox labeled 'I agree to the statement above' is checked. At the bottom are 'OK' and 'Cancel' buttons.

SCHEDULED FUTURE PROCESSES

Once scheduled, to see what background processes are scheduled to be run, run the **Scheduled Future Processes** report. The report includes integrations, batch processes, and reports that are scheduled to run either one time in the future or on a recurring basis.

You can view the details, edit or even transfer ownership of the scheduled process by using the related actions off of the request object as shown below. Schedules can be suspended, reactivated or deleted.

Scheduled Future Processes								
<input type="button" value="Refresh"/> <input type="button" value="New"/>								
Background Processes 29 items								
Process Type	Process	Request Name	Run Frequency	Owned By	Start Date	End Date	Status	
Alert Notification	Alerts	Expiring Certifications Alert	Weekly Recurrence	Logan McNeil	03/06/2011	12/31/2013	Expired	
Alert Notification	Alerts	Expiring Customer Contract Lines	Monthly Recurrence	Teresa Serrano	06/23/2012	12/31/2013	Expired	
Alert Notification	Alerts	Expiring Supplier Contracts	Monthly Recurrence	Teresa Serrano	10/22/2012	12/31/2013	Expired	
Alert Notification	Alerts	Missing Project Timesheet Alert	Weekly Recurrence	Teresa Serrano	03/06/2011	12/31/2013	Expired	
Alert Notification	Alerts	Missing Supplier W-9 Forms	Weekly Recurrence	Teresa Serrano	10/21/2012	12/31/2013	Expired	
Alert Notification	Alerts	Missing Time Entry for Hourly Workers Alert	Weekly Recurrence	Logan McNeil	10/29/2012	12/31/2013	Expired	
Alert Notification	Alerts	No PTO submitted for the month Alert	Monthly Recurrence	Logan McNeil	02/26/2013	02/25/2014	Expired	
Alert Notification	Alerts	Open Revenue-Producing Positions Alert	Weekly Recurrence	Logan McNeil	03/11/2012	12/31/2013	Expired	
Alert Notification	Alerts	Overdue Business Processes	Monthly Recurrence	Logan McNeil	10/24/2012	12/31/2013	Expired	
Alert Notification	Alerts	Overdue Business Process Tasks Alert	Monthly Recurrence	Logan McNeil	10/24/2012	12/31/2013	Expired	
Alert Notification	Alerts	Overdue Customer Credit Verifications	Weekly Recurrence	Teresa Serrano	10/22/2012	12/31/2013	Expired	
Alert Notification	Alerts	Overdue Customer Invoices Alert	Weekly Recurrence	Teresa Serrano	03/04/2013	02/25/2014	Active	
Alert Notification	Alerts	Overdue Supplier Certificates of Insurance	Weekly Recurrence	Teresa Serrano	10/22/2012	12/31/2013	Expired	
Alert Notification	Alerts	Overdue Supplier MBE/WMBE Certificates	Weekly Recurrence					
Alert Notification	Alerts	Requested Worker Approved	Weekly Recurrence					
Alert Notification	Alerts	Segregation of Duties Exceptions Alert						
Alert Notification	Alerts	Sick Time Taken Alert						
Alert Notification	Alerts	Time Off Balances Employee Alert						
Alert Notification	Alerts	Time Off Request Alert						
Alert Notification	Alerts	Workers to Watch Alert						
Job	Prepaid Spend Amortization Process	Monthly D&O						
Job	Prepaid Spend Amortization Process	Monthly Teleconex						
Report	WDINST RW Employee Audit	WDINST RW Employee Audit						

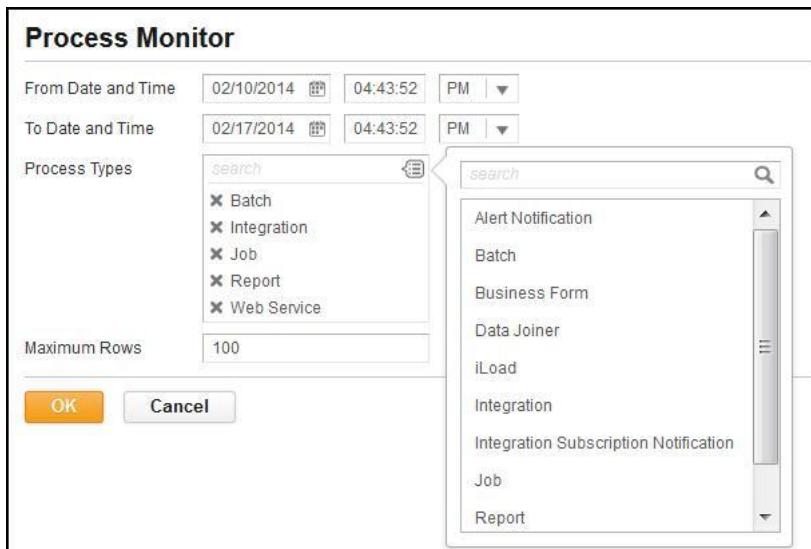
Transfer Ownership of a scheduled process: Once you create the process, you can Transfer Ownership of that process. Note that the report is not transferred with but the process of the scheduled report is transferred. Logan must still access and modify the original report.

The owner of the scheduled process can edit the schedule future runs of that process, they cannot modify the report that is being run by the process. When the scheduled report is run, the process owner's security is applied to the results of that report.

PROCESS MONITOR

Run the **Process Monitor** report to view the **process status of all background processes**, regardless of the process type (alert notification, batch, business form, integration, integration subscription notification, and/or report), date range (from and to date and time), and maximum number of rows to return (default is 100 rows, no upper limit).

The Process Monitor lists only processes that are running or have run. You can also view any errors associated with a background process instance.



NOTIFICATION AND RETRIEVAL OF SCHEDULED REPORT OUTPUT FILES

Once a report schedule has run, active sessions will be notified of the report output file via a notification icon in their Workday session. Note, users will only see this notification if they are currently logged into Workday when the scheduled report runs.

Users can find the scheduled report output in several ways:

1. Click on the **Notification icon** in session to see file(s)



2. There should also be a **notification in the Inbox**. By Viewing the message in the Inbox, you can also see the file
3. on the **W Drive**

A screenshot of the W: Drive interface for user Logan McNeil. On the left is a sidebar with navigation links: All About Me, My Team, Workbench, My Workday 2.0, Dashboards, Sitemap, Favorites, Audit, W:Drive (which is selected and highlighted in grey), and Documentation. The main area is titled "W: Drive" and shows a table of "My Reports". The table has columns for Date and Time Created, File, File Name, Available Actions, Type, Created by, and Number of Shared Users. The table lists several reports, including "Audit 2014-02-17 15_45 PST" which was created on 02/17/2014 at 03:45 PM. A context menu is open over this specific report entry, showing options: Repository Document, Artifacts, Favorite, Integration IDs, Reporting, Maintain Tags, Shared Users, Properties, and on or. The "Available Actions" column for this row also lists these options.

Note: Only the report output file owner (the owner of the schedule) can delete the report output file. Once deleted, it will be deleted from the Workday system and will no longer appear for any recipient. The report output file owner can also add/remove tags and/or add/remove shared users.

4. via the **Reports** Worklet configured on a landing page.

My Team

- My Team**: View, About Me, Account Balance Data, Account Set Usage, Accrual and Time Off Adjustments/Over..., Accumulation Types, Active Employees, Actual Increase less than Statutory Min..., Additional Reviewer Comments, Addresses, Alert - Anniversaries for this week and n..., More (937)
- Reports**: Tools, Schedule a Report, Process Monitor, Background Processes for a Process, View All My Reports, Create Custom Report
- Birthdays**: My Report Files, WDINST RW Employee Audit 2014-02-17 15_45 PST Report (PDF)
- Spend Management**: (Icon showing a calculator)

5. By running the task: **My Report Output Files** or **My Reports** (with the option to use report tags to locate files)

My Reports

Report Tags	<input type="text" value="Training Reports"/>
Created in Last x Days	30
OK Cancel	

My Reports

My Reports		Created in Last x Days	Report Tags	Actions			
Created in Last x Days	30	Report Tags	Training Reports	X E			
Date and Time Created	File Name	Type	Process	Request Name	Created by	Size	Expiration Date
02/17/2014 03:45 PM	WDINST RW Employee Audit 2014-02-17 15_45 PST	Report (PDF)	WDINST RW Employee Audit	WDINST RW Employee Audit - created on 02/17/2014 15:45 by Logan McNeil	Logan McNeil	46 KB	02/22/2014



ACTIVITY 15 – SCHEDULING REPORTS

Business Case: Logan will schedule the **WICT RW Employee Audit** report and share the output with Jack Taylor and others in the Payroll Administrator security group. By Scheduling a report and sharing the output file with others, you will see how recipients will see the report output 'as Logan'.

SCHEDULE REPORT

1. As Logan McNeil, find the **WICT RW Employee Audit** report definition (use Reporting search category or rd: search prefix).
2. Using related actions, select **Custom Report > Schedule**.
3. Select the **Run Frequency of Daily Recurrence** and click **OK**.
4. Since this report has a prompt, you must fill out the needed **Report Criteria** as part of the schedule. Enter the organization as **Global Modern Services**.

Field	Value Type	Value
Organization	Specify Value	Global Modern Ser ...

5. Click on the **Schedule** tab and verify that the recurrence type is set for **Recurs Every Weekday**.
 - a. Select the closest available next time to the current time in the Pacific Timezone (for example if it is currently 10:35AM Pacific then select 10:45AM). Accept the time zone default of **Pacific Time**.
 - b. Input a range of recurrence from Start Date of **today's date** to End Date of **1 year from now**.
6. Select the **Output** tab and verify that the report will be delivered as an **Excel report**.
 - a. Enter **1** for File to be Deleted After (Days).
 - b. **Tag** the report output as "*Training Reports*"

Output Type
 Excel
 Report (PDF)

Report Tags

 Training Reports

File to be Deleted After (Days) *

Do Not Output an Empty Report

OK **Cancel**

7. Select the **Share** tab and select *Share report output with other users.*

- a. Enter **Jack Taylor** as an *Authorized User* and enter **Payroll Administrator** for the security group then check the *I agree to the statement above* checkbox.

Report Output Sharing Options
 Don't share report output
 Share report output with other users

Authorized Users

 Jack Taylor (jtaylor)

Security Groups

 Payroll Administrator

I agree to the statement above

OK **Cancel**

8. Click **OK** to save.

9. You now have a scheduled report request. To go back and edit your schedule, use the related action option to Edit the scheduled future process.

View Scheduled Future Process
WDINST RW Employee Audit

Available Actions

- Scheduled Future Process
- Audits
- Favorite
- Integration IDs
- Reporting

Scheduled Future Process
WDINST RW Employee Audit

Field	Value Type	Value
Organization	Specify Value	Global Modern Services

VIEW PROCESS MONITOR & SCHEDULED FUTURE PROCESSES IN TENANT

- Run **Scheduled Future Processes** to see the request and status. You can click on the related action icon next to the Request Name to edit and take action on your schedule if needed.

Scheduled Future Processes									
<input type="button" value="Refresh"/> <input type="button" value="Print"/> <input type="button" value="Email"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>									
Process Type	Process	Request Name	Run Frequency	Owned By	Start Date	End Date	Status	Number of Times Run	Next Scheduled Date and Time
Alert Notification	Alerts	Expiring Customer Contract Dates	Monthly Recurrence	Teresa Serrano	01/23/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Expiring Supplier Contracts	Monthly Recurrence	Teresa Serrano	10/22/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Missing Project Timesheet Alert	Weekly Recurrence	Teresa Serrano	03/06/2011	12/31/2013	Expired	0	
Alert Notification	Alerts	Missing Supplier W-9 Forms	Weekly Recurrence	Teresa Serrano	10/21/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Missing Time Entry for Hourly Workers Alert	Weekly Recurrence	Logan McNeil	10/29/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	No PTO submitted for the month Alert	Monthly Recurrence	Logan McNeil	02/26/2013	02/25/2014	Expired	0	
Alert Notification	Alerts	Open Revenue-Producing Positions Alert	Weekly Recurrence	Logan McNeil	03/11/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Overdue Business Processes	Monthly Recurrence	Logan McNeil	10/24/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Overdue Business Process Tasks Alert	Monthly Recurrence	Logan McNeil	10/24/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Overdue Customer Credit Verifications	Weekly Recurrence	Teresa Serrano	10/22/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Overdue Customer Invoices Alert	Weekly Recurrence	Teresa Serrano	03/04/2013	02/25/2014	Active	0	02/24/2014 00:15 PST
Alert Notification	Alerts	Overdue Supplier Certificates of Insurance	Weekly Recurrence	Teresa Serrano	10/22/2012	12/31/2013	Expired	0	
Alert Notification	Alerts	Overdue Supplier MBE/WMBE Certificates	Weekly Recurrence		12/31/2013		Expired	0	
Alert Notification	Alerts	Requested Worker Approved	Weekly Recurrence		12/31/2013		Expired	0	
Alert Notification	Alerts	Segregation of Duties Exceptions Alert						0	
Alert Notification	Alerts	Sick Time Taken Alert						0	02/23/2014 00:00 PST
Alert Notification	Alerts	Time Off Balances Employee Alert						0	
Alert Notification	Alerts	Time Off Request Alert						0	
Alert Notification	Alerts	Workers to Watch Alert						0	
Job	Prepaid Spend Amortization Process	Monthly D&O						0	
Job	Prepaid Spend Amortization Process	Monthly Teleconex						0	
Report	WDINST RW Employee Audit	WDINST RW Employee Audit			02/17/2014 04:30:00:00 PM			0	02/17/2014 16:30 PST

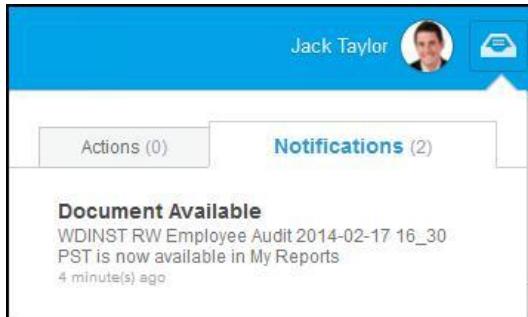
- Run **Process Monitor** to see if completed successfully
- As Logan, note the notification icon in the session when the scheduled report output file is available.
- Verify the report output file. Go to the **W: Drive** and view the report output file. Note how Logan can maintain the tags and shared users lists for this file after the schedule has completed and even delete the file on the w: drive. She is the owner of the file given the schedule ran under her account.

W: Drive						
W: Drive for Logan McNeil						
My Reports		Statistics				
10 items						
Date and Time Created	File	File Name	Type	Created by	Number of Shared Users	
02/17/2014 04:30 PM	Q	*****	Excel	Logan McNeil	6	<input type="button" value="Delete"/>
02/17/2014 03:45 PM	Q	Employee Audit 2014-02-17 16_30 PST	Report (PDF)	Logan McNeil	6	<input type="button" value="Delete"/>
06/10/2013 02:42 PM	Q	Maintain Tags 15_45 PST	Business Form (PDF)	Logan McNeil	6	<input type="button" value="Delete"/>
06/10/2013 02:42 PM	Q	Audits	Business Form (PDF)	Logan McNeil	6	<input type="button" value="Delete"/>
06/10/2013 02:42 PM	Q	Favorite	Business Form (PDF)	Logan McNeil	6	<input type="button" value="Delete"/>

Now test the report output sharing by signing in as **Jack Taylor (jtaylor)**.

➊ Sign in as Jack Taylor (jtaylor)

1. Jack does not see the notification icon since he was not logged in when the report was run and available.
2. He does however see a notification in his **inbox**. He can access the document from this inbox notification as well.



3. He can also retrieve the *scheduled report output file* that Logan ran and shared with him in the following ways:

4. W: Drive

W: Drive			
W: Drive for Jack Taylor			
My Reports		Statistics	
2 items			
Date and Time Created	File Name	Type	Created by
02/17/2014 06:30 PM	WDINST RW Employee Audit 2014-02-17 16_30 PST	Excel	Logan McNeil

5. Running the **My Report Output Files** or **My Reports** task from search box.

Use Report Tag "Training Reports" to locate the report output file.

My Report Output Files ...								
Report Tags: Training Reports								
Created in Last x Days: 30								
2 items								
Date and Time Created	File Name	Output Type	Process	Request Name	Created by	Size	Deletion Date	Report Tags
02/17/2014 06:30 PM	WDINST RW Employee Audit 2014-02-17 16_30 PST	Excel	WDINST RW Employee Audit	WDINST RW Employee Audit - created on 02/17/2014 16:30 by Logan McNeil	Logan McNeil	43276	02/18/2014	Training Reports

6. Via the **Reports Worklet**.

- a. If the Reports Worklet is not configured on a landing page, you can take the following steps:
- b. Go to Jack's **My Team** landing page as an example.

Report Writer for Workday

- c. Click on the gear icon  in the upper right, and add the Reports Worklet as an optional worklet

Configure Worklets

Required Worklets
The following worklets are required on your My Team page.

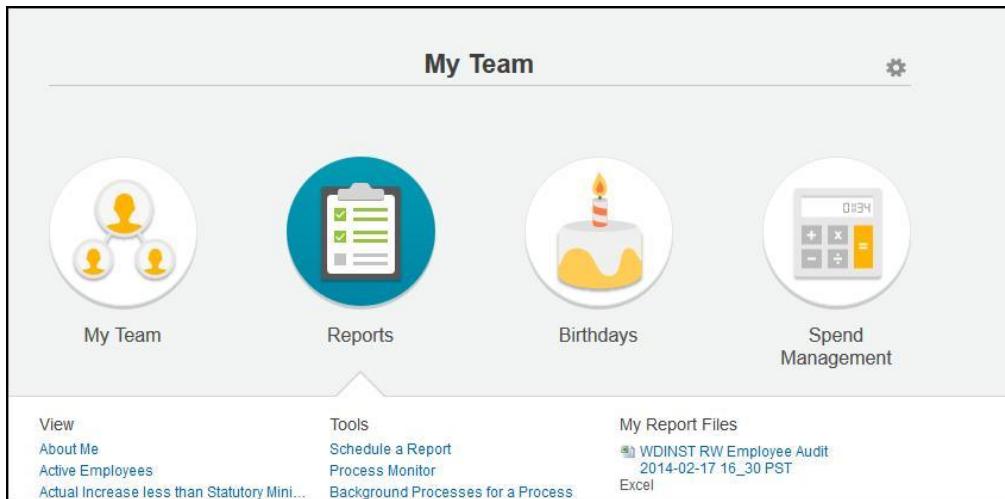
Worklet
My Team

Optional Worklets
Select the optional worklets you would like to include on your My Team page.

Order	Worklet
▼ ▼	Reports 
▲ ▼	Birthdays
▲ ▼	Spend Management
▲ ▼	More
▲ ▼	Process Status
▲ ▼	Hiring
▲ ▼	Team Performance
▲ ▼	Headcount
▲ ▲	Favorites

- d. Click OK and Done.
- e. Now the Reports Worklet will show on Jack's My Team landing page and he can see his report output files via the worklet as well. (End of Activity)

My Team



View	Tools	My Report Files
About Me	Schedule a Report	 WDINST RW Employee Audit 2014-02-17 16_30 PST
Active Employees	Process Monitor	Excel
Actual Increase less than Statutory Min...	Background Processes for a Process	

Important: When Jack opens the shared output Excel file from Logan's scheduled report, he sees the report data 'as Logan'. The report ran as Logan with Logan's security and Logan just shared the output file with Jack. If Jack had run the report in Workday himself, he would have seen the output using his own security, as we saw in an earlier activity.

OTHER REPORT CONFIGURATION OPTIONS

REPORT RUN HISTORY

You can use the Workday-delivered **Report Run History** report to obtain the run history of both Workday standard reports and Workday custom reports. Up to six (6) months of report run data is available (starting from the current date and going back 6 months). Information provided by this report includes:

- Report name
- Count (number of runs) - You can click on the **Count** value to drill into additional details.

The screenshot shows the 'Report Run History' interface. On the left, a list of 252 items is displayed, including various report names like 'Background Processes for a Process', 'Positive Pay File', and 'Payroll Payments to Print'. On the right, there is a sidebar titled 'View By' with options such as Report Name, Requested By, Requested By User, Report Owner, Execution Mode, Execution Type, Report Type, Details, and View Details. At the bottom right, there are two numerical values: 153 and 142.

Having this information enables you to understand who is running certain reports and how often specific reports are run. It can also be useful as part of your Workday Update testing to know what reports to focus on that are being used the most.

Note that report run history does not include worklet executions, nor does it include XpressO report executions.

Setup required

To access any of the report run history for your tenant, you must specifically opt in to this data collection feature. You do so by accessing the **Edit Tenant Setup - Reporting and Analytics** task, and selecting the **Enable Access to Report Run History** option. For more information, see Tenant Setup - Reporting and Analytics.

The screenshot shows the 'Edit Tenant Setup - Reporting and Analytics' dialog box. Under the 'Report Run History' section, there is a checkbox labeled 'Enable Access to Report Run History' which is checked. Below the checkbox, there is a note: 'Specify if you want to enable access to 1 month of report run history'.

Report Writer for Workday

The **Report Run History** report is built upon the INDEXED REPORT RUN HISTORY data source, which you can use to build your own custom reports. This data source tracks six (6) complete calendar month of report run history from the current date, back 6 months.

There is also a delivered report field on the Custom Report business object that shows the number of times the given custom report has been executed.

Report Type	Advanced	Available Actions	Report Field	Number of Times Executed
Data Source	All Custom Reports	Report Field	Field Name	Number of Times Executed
Data Source Type	Standard	Audits	Business Object	Report Definition (All)
Primary Business Object	Custom Report	Favorite	Description	Returns the number of times the report has been executed within the date range specified. Does not include worklet executions. Note that the Start Date cannot be prior to six months ago based on the current date.
Additional Info		Integration IDs	Field Source	Workday Delivered
		Reporting	Field Type	Numeric
		Security	Parameters	Report Run History End Date Report Run History Start Date
			Related Business Object	(empty)
			Built-in Prompts	Report Run History End Date Report Run History Start Date
			Category	Report Writer
			Authorized Usage	Default Areas

MAINTAIN EXCEL TEMPLATE

Workday helps you automate your Excel processing and formatting when exporting a Workday custom report. This feature reduces the time and effort needed to deliver Excel workbooks based on Workday custom reports, especially in cases when you export a report on a regular basis and then reformat the data in Excel. This feature also works with report groups. Workday supports a maximum of 10 reports within a single report group, all of which use the same Excel template associated with the report.

To use this feature, you **upload an Excel workbook template** to Workday and **associate it with a custom report**. The Excel workbook template you create can contain macros and formulas to reformat the data and perform calculations.

You must then **schedule the custom report to run in the background**. Once the report has executed in the background, the Workday **output is merged into the Excel workbook template you uploaded, as a separate sheet**. The resulting workbook includes any macros, calculations, and formatting you've defined in the associated workbook template.

Note: Workday ensures that your report data is output as a sheet into the Excel workbook that you associate with the report. You are responsible for designing and troubleshooting any Excel macros and formulas in the Excel template workbook that you create for use with this feature

View Custom Report

WDINST RW Employee Audit

Report Name	WDINST RW Employee Audit
Report Type	Advanced
Data Source	Employees by Organization
Data Source Type	Standard
Primary Business Object	Employee

Additional Info

Available Actions

- Custom Report
- Audits
- Calculated Field for Report
- Favorite
- Integration IDs
- Layout

Custom Report

- Edit
- Run History
- Copy
- Maintain Excel Template**
- Run
- Schedule
- Test

Each time the custom report (or Report Group) is run in the background (i.e. scheduled)

- The output of the custom report is inserted into a copy of the uploaded Excel workbook as a separate sheet
- The resulting Excel workbook (i.e. your Excel template plus the report output) is stored in the user's W drive

This option allows you to automate and make repeatable in Workday a previously 'outside of Workday' excel formatting and calculation task on Workday data.

TRANSFER OWNERSHIP

Custom Reports in Workday can only have one report owner. The report owner is the user that created or copied the report. Report ownership can be transferred to other report writers.

Those with access to the domain: **Custom Report Administration** or domain: **Manage All Custom Reports** can transfer ownership of reports. Transfer Ownership can be run using related actions for a given report or as a standalone task.

Transfer Ownership of Custom Reports

Select the reports to be transferred and the new owner

Report Name(s) *

WDINST RW Employee Audit

New Owner: *

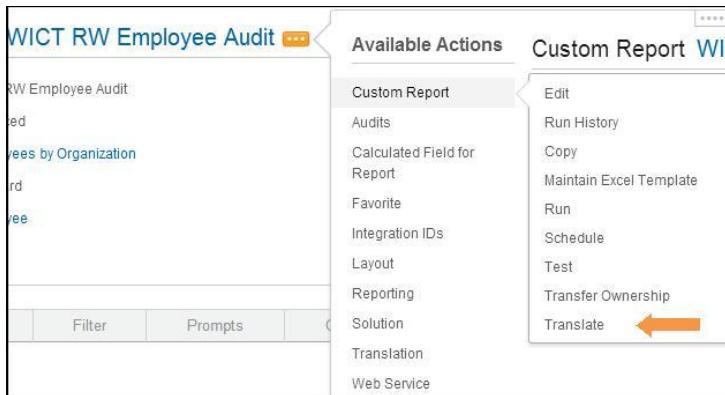
It is important to note that a report can only be transferred to a report writer that has access to that report's data source. However, the report writer the report is being transferred to may not have access to all the Report Fields. It is beneficial to run the Custom Report Exception Audit report after you have transferred ownership to catch any potential conflicts.

TRANSLATING CUSTOM REPORTS

By having the ability to translate a custom report, you can design a report once and then deploy it multiple times in different languages. Users whose preferred language corresponds to one of the languages for which the report has been translated will **see report labels and prompts** in their preferred language. This saves you the trouble of designing the same report in multiple languages.

For each language for which you want to translate a custom report, follow the steps below.

1. Access the custom report you want to translate.
2. From the related actions menu, select **Custom Report > Translate**.



3. Select the **Target Language** and click OK.
4. Enter a **Translation name**.
5. Provide translations for needed field labels.

Field	Field Translation	Column Heading Override	Translation
Group Name	Nombre de grupo	Location/Sup Org	
Worker	Trabajador		
Total Base Pay Annualized in USD - Amount			
Count	Recuento		
Hire Date	Fecha de contratación		
Manager - Level 01	Gerente - Nivel 01		
Social Security Number - Formatted			
Date of Birth	Fecha de nacimiento		
Emergency Contacts	Contactos de emergencia		

6. Click OK when finished with this translation.
7. Repeat these steps for each language for which you want to translate the custom report.

A user whose preferred language is set to one of the target languages associated with the report, will automatically **see the report labels and prompts displayed in their preferred language.**

Using the related action of **Translation > Translate Instance** you can translate text information around the report instance itself, such as the brief description or more information.

Translate Tenant Instance 

Instance	WDINST RW Employee Audit	
Target Language	Spanish (Neutral)	
Class of this Instance	Custom Report Definition	
3 items		
Translatable Attribute	User Language	Text Value
Brief Description	English (United States)	Manager report – auditing information for active
	Spanish (Neutral)	
Label Override		
More Info		

OK **Cancel**

SOLUTIONS

Custom Reports can be **migrated** between your tenants (Sandbox to Production) using **Solutions** saving you from having to re-create and re-configure them in another tenant. You can also use Solutions to **publish and/or import** definitions to the Solution Library (a common repository managed by Workday for all customers and partners).

View Custom Report Purchases by Cost Center		Available Actions		Custom Report Purchases by Cost Center	
Report Name	Purchases by Cost Center	Custom Report	Brief Description	(empty)	
Report Type	Matrix	Audits	Data Source	Purchase Order Lines	
Data Source	Purchase Order Lines	Favorite	Primary Business Object	Purchase Order Line	
Data Source Filter	Purchase Order Lines Filter	Integration IDs			
Data Source Type	Indexed	Reporting			
Primary Business Object	Purchase Order Line	Solution	Create		
		Translation			

Supporting Documents and Screenshots			
Screenshot(s)	search	<input type="button" value=""/>	
Documents	search	<input type="button" value=""/>	

Solution Configurations			
+	Order	*Configuration Type	Configuration
+	▼ ▼	Custom Report	Purchases by Cost Center

For more on Solutions please see Community documentation.

MANAGE LAYOUTS & VIEW URLs

MANAGE LAYOUTS

Workday enables you to design and use **business form layouts** for meeting the exact layout specifications required by your organization. These specifications might include rich text formatting, headers and footers, page breaks, logos, and exact placement of labels, data, spaces, and margins.

The **Report Designer tool in Workday Studio** enables you to use all these types of layout features and more. It is an easy-to-use, graphical layout tool designed specifically for this purpose. Once designed in Report Designer, you can deploy your report design to your Workday tenant to associate the layout with your custom report. Layouts can then be applied when printing your report in Workday.

For more information, please see Workday's Report Designer training offerings.

WEB SERVICE > VIEW URLs

Workday enables you to expose advanced custom reports as web services. You can **enable a custom report as a web service** under the **Advanced** tab. Web services allow inter-operable, machine-to-machine interaction over the Internet. In Workday, web services present report results as **URLs**, enabling integration between Workday and external business services, such as payroll or benefits providers. Web services also can be used to expose business data to external reporting tools, such as Microsoft Excel.

For more information on enabling reports as web services, please see Workday's Integration related training offerings.

INTRODUCTION TO CUSTOM ANALYTICS - MATRIX REPORTING

Workday enables you to build your own custom analytics. Using the same approach as creating a custom report, you can create your own analysis matrix cubes to gain new insights into your data and take action on the results. Matrix reports are ideally suited for:

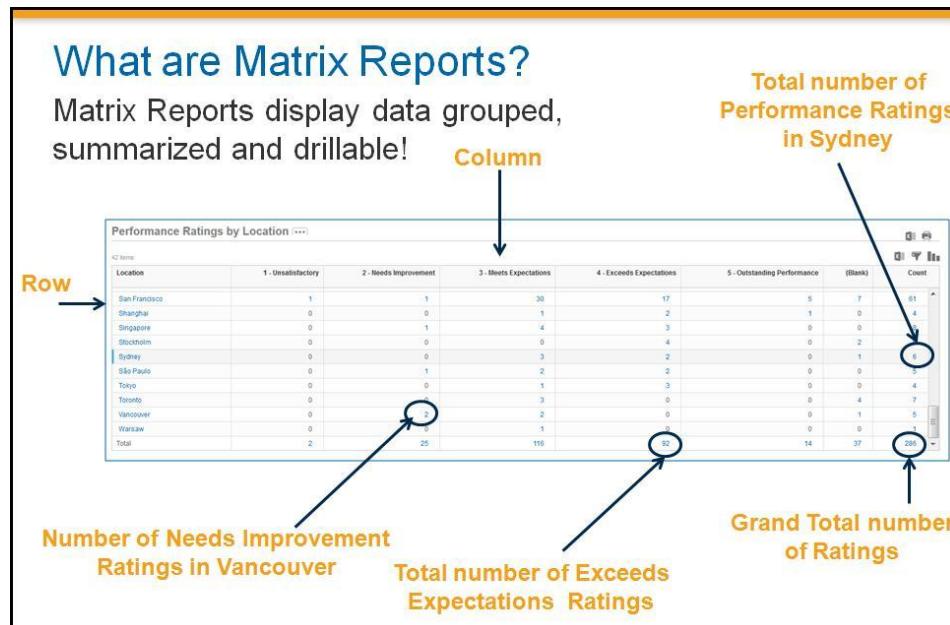
- **Aggregating/summarizing** numeric data and visually charting the results.
- Changing **rows and columns** dynamically at runtime to view different summarizations.
- **Drilling** into a summarized amount for further analysis, and then taking action based on new insights.
- **Drilling into the details** that comprise any summarized amounts.

MATRIX REPORTS

The *matrix* report type is used to display data grouped and summarized with the ability to interact and drill into the summarizations. Matrix reports are similar, but not identical to, **pivot tables and crosstabs** found in other systems.

Data is grouped in a **row group** and optionally a **column group**. Values in the matrix cells display aggregate values scoped to the intersection of the row and column groups to which the cell belongs.

At runtime, as the report is processed, the report matrix is built both horizontally and vertically on the page, based on the data selected. If you create a matrix report and share it with a user who is not authorized to view the Summarization Field, a runtime error appears when the user attempts to run the report.

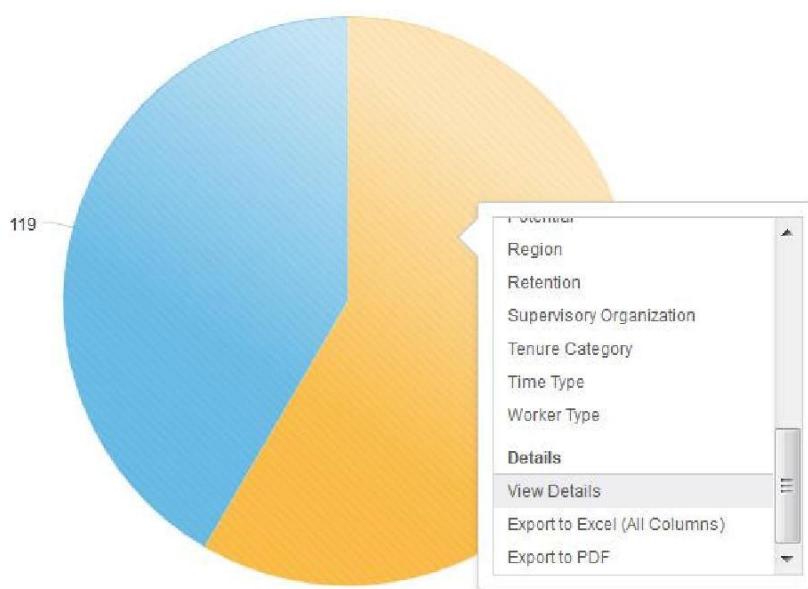


Once the matrix is built, you can view the summarization data by different fields, and each cell within the matrix is drillable. You can **drill into a number** displayed in a cell of the matrix and group the results by another field (**View By**), or you can **view the details** (**View Details**) that comprise the number in the cell of the matrix.

Drillable Fields and Detail Data are defined under the "Drill Down" tab in the matrix report definition.

3 - Meets Expectations	4 - Exceeds Expectations
2	1
4	
0	
0	
3	
0	
3	
14	
0	
11	
0	

- View By**
- Job Profile
- Location
- Management Level
- Manager - Level 01
- Rating - Current
- Details**
- View Details**
- Export to Excel (All Columns)
- Export to PDF



MATRIX REPORT DEFINITION

When defining a Matrix Report, you must first define the summary matrix for the report under the **Matrix** tab.

You must configure how you want to summarize the Primary Business Object for your report and in what Row and Column groupings.

You must specify at least one **Row** grouping and one summarization. Column groupings are optional. By default, the summarization type uses Count. We will discuss more about Summarization Types later.

The screenshot shows the 'Headcount by Gender' report configuration. It includes sections for Report Name, Report Type, Data Source, and Primary Business Object. Below these are tabs for 'Additional Info' (selected), 'Matrix' (selected), and other options like Drill Down, Filter, Prompts, Output, Share, and Advanced. The 'Matrix' tab displays the summary matrix setup. It shows 'Row Grouping' with a table for 'Group by Field' (Gender) and 'Label Override'. The 'Sort Rows' column lists 'Row total - Descending', 'Alphabetical - Ascending', 'Alphabetical - Ascending', and 'Alphabetical - Ascending'. There is also a note about a maximum of 250 rows. The 'Column Grouping (optional)' section shows a table for 'Group by Field' and 'Label Override', with 'Sort Columns' set to 'Alphabetical - Ascending' and 'Alphabetical - Ascending'. A note about a maximum of 20 columns is present. Finally, the 'Define the Field(s) to Summarize' section shows a table for 'Summarization Type' (Count) and 'Summarization Field'.

DEFINING DRILLABLE FIELDS & DETAIL DATA (DRILL DOWN TAB)

When building a Matrix Report, you can also define what fields the user can further drill and group by ("Drillable Fields") which will drive what fields show up under the **View By** field list. You can also define what fields should show when the user selects **View Details** ("Detail Data") or clicks on a summarization metric.

The screenshot shows the 'Drill Down' tab selected in the top navigation bar. Below it, there's a note about specifying group by fields and detail data. The 'Group By Fields' section is expanded, showing 'Sort Dimensions Alphabetically' set to 'Yes' and 'Fields That Can Be Summarized' set to 'Specific Fields'. The 'Drillable Fields' section lists five items: Location, Rating - Current, Management Level, Manager - Level 01, and Job Profile. The 'Detail Data' section lists three columns: Worker, Supervisory Organization, and Manager - Level 01.

Field	Label Override
<input checked="" type="checkbox"/> Location	
<input checked="" type="checkbox"/> Rating - Current	
<input checked="" type="checkbox"/> Management Level	
<input checked="" type="checkbox"/> Manager - Level 01	
<input checked="" type="checkbox"/> Job Profile	

Field
<input checked="" type="checkbox"/> Worker
<input checked="" type="checkbox"/> Supervisory Organization
<input checked="" type="checkbox"/> Manager - Level 01

For the **Group By Fields**, you can select either **Default Fields** or **Specific Fields**.

- The **Default** Group by Fields are subject to change from one Workday update to the next. To ensure the same Group by Fields are included in your matrix report from update to update, you should explicitly define the fields (**Specific Fields**) in the *Group by Fields/Drillable Fields* section on the **Drilldown** tab.
- If you explicitly define the fields in the *Drillable Fields* on the **Drilldown** tab and then share the report with a user, the user can only View and Group the report based on the fields he or she is authorized to view.

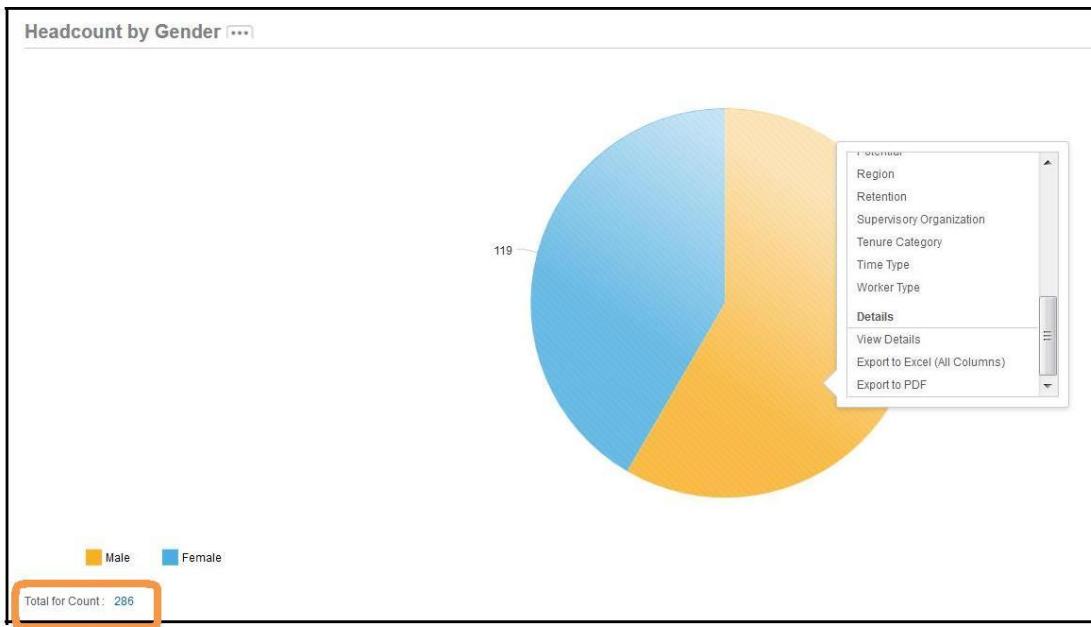
MATRIX REPORTING – VIEWING A MATRIX REPORT

Let's begin by looking at a Matrix report already in the system. The **Headcount by Gender** report is a matrix report already created in our training tenant.

Notice that this report outputs as a pie chart and that it can be drilled into to view additional information about the data in the report.

Clicking on either of the halves of the pie chart allows you to view additional information about the segment of data on that half.

Clicking on the total **Count** number allows you to view information about the total population in the report.



The options under **View By** are configured by you (or can be) under the **Drilldown tab/Drillable Fields** section in the Matrix report creation.

View Details displays the detail data that you have configured for the Matrix report under the **Drilldown tab/Detail data** section.



ACTIVITY 16 – CREATE MATRIX REPORT

Business Case: Now that you are a Matrix report writing expert you have been asked to create a report for the recruiting department that will show the hiring source at each particular location for workers. You will need to include whether the worker is a manager or not, the gender of the worker, the location, hire date, supervisory organization, and the annual compensation for each worker. The recruiting department wants to see the average compensation for each location, as well as the percentage of overall total. Output in chart and table. Only workers from locations in the United States should show up on this report.

TASK 1 - CREATE CUSTOM REPORT

- From the search box, run the task: *Create Custom report*.

Field Name	Entry Value
Report Name	WICT RW Recruiting Analysis
Report Type	Matrix
Data Source	All Active and Terminated Workers <ul style="list-style-type: none"> As a reminder this is not the most efficient data source and includes a very general and large set of instances that may not all be needed in your report. Consider more targeted or indexed data sources for optimal report performance.

- Click **OK** to begin editing this report.
- Under the **Matrix** tab, define the
 - Row Grouping:** *Hiring Source*
 - Column Grouping:** *Location*
- Define the **Summarizations** as:
 - Summarization Type:** Count
 - Summarization Type:** Average **Field:** Total Base Pay Annualized Amount

Report Writer for Workday

Matrix Drill Down Filter Prompts Output Share Advanced

Define the summary matrix for the report

Row Grouping

4 items

Group by Field	Label Override	Sort Rows
Hiring Source		Row total - Descending
		Row total - Descending
		Row total - Descending
		Row total - Descending

Maximum Number of Rows 250

Column Grouping (optional)

2 items

Group by Field	Label Override	Sort Columns
Location		Column total - Descending
		Column total - Descending

Maximum Number of Columns 20

Define the Field(s) to Summarize

2 items

Summarization Type	Summarization Field	Format	Options
Count		,###0	
Average	Total Base Pay Annualized - Amount	,###0	Show Currency Symbol

5. Click on the **Drilldown** tab to define the '**Drillable fields**' that the report can be viewed and grouped by: Include the following **Drillable Fields**:
 - a. Hiring Source
 - b. Gender
 - c. Ethnicity
 - d. Location
 - e. Age Group
6. Still under the Drilldown tab, configure the **Detail Data** section to determine what fields to show when someone wants to view the details. Include the following **Detail Data** fields:
 - a. Worker
 - b. Worker's Manager
 - c. Total Base Pay Annualized Amount
 - d. Is Manager
 - e. Supervisory Organization

Matrix **Drill Down** Filter Prompts Output Share Advanced

Specify the group by fields and detail data that should be displayed when a user drills into the matrix report.

Group By Fields

Sort Dimensions Alphabetically Yes

Fields That Can Be Summarized

Default Fields
 Specific Fields

Drillable Fields 5 items

Field	Label Override	Sort	Options
Hiring Source		Total - Descending	
Gender		Total - Descending	
Ethnicity		Total - Descending	
Location		Total - Descending	
Age Group		Total - Descending	

Detail Data

Columns 5 items

Field	Column Heading Override	Format	Options
Worker			Related Tasks Only
Worker's Manager			
Total Base Pay Annualized - Amount			
Is Manager			Show No When False
Supervisory Organization			

- While still in Edit mode, go to the **Filter** tab and add Filter conditions to only include employees and only those in the United States.

(Note how we took a very 'general and slow' data source: All Active & Terminated Workers and are now filtering it down to just Employees in the United States. Consider a more targeted or indexed data source from the start for better performance to save the report from loading a large number of instances only to then filter out many.)

Field Name	Entry Value
Field	Location Address – Country
Operator	Frequently Used > In the selection list
Comparison Type	Value Specified in this Filter
Comparison Value	United States of America

- Add another filter condition

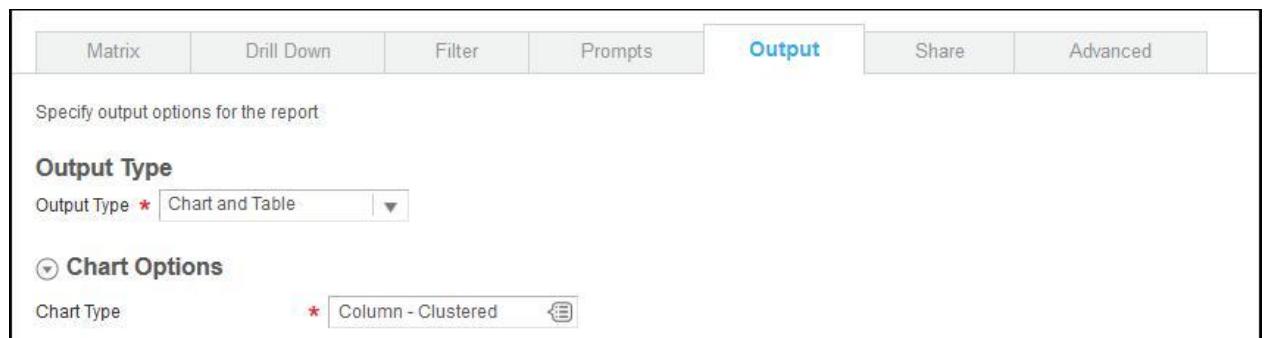
Field Name	Entry Value
And/Or	And
Field	Worker Type

Operator	Frequently used > in the selection list
Comparison Type	Value Specified in this filter
Comparison value	Employee



The screenshot shows the 'Filter' tab selected in the top navigation bar. Below it, a table lists two filter items. The first item is 'Location Address - Country' with an operator 'in the selection list' and a comparison type 'Value specified in this filter' with a value 'United States of America'. The second item is 'Worker Type' with an operator 'in the selection list' and a comparison type 'Employee'.

9. Under the **Output** tab, select **Chart and Table**, with **Chart type: Column Clustered**.



The screenshot shows the 'Output' tab selected in the top navigation bar. Below it, under 'Output Type', 'Chart and Table' is selected. Under 'Chart Options', 'Chart Type' is set to 'Column - Clustered'.

10. There will be no entry necessary on the **Share** tab nor **Advanced** tab at this time.

11. Click OK to save and Run the report

12. Answer the following questions using the matrix report output table. You have the ability to drill into the numbers and answer all of the following questions if your report is set-up correctly:

- a. What hiring source reports the lowest average salary? _____
- b. What hiring source reports the highest average salary? _____
- c. What location reports the highest average salary? _____
- d. What is the average salary for white males in San Francisco? _____
- e. What is the average salary for all females in all locations? _____

ADDITIONAL RESOURCES

TEST REPORT PERFORMANCE

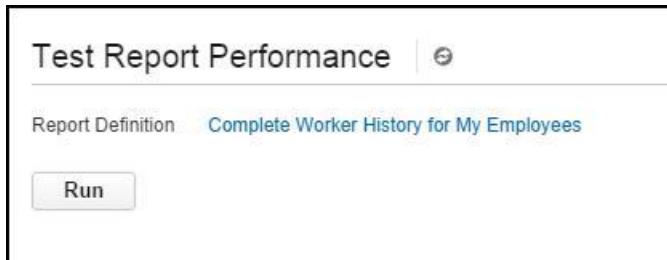
Workday provides a **Test Report Performance** task that enables you to log report performance. Using these logs you can further evaluate timings around your report's data source, filter conditions, sort and field timings.

You can create **3 types of logs** for the specified report definition:

- A **customer log**: allows you to view performance data and use it optimize report performance independently.
- A **support log**: provides additional performance data for Workday's support team to help them resolve performance issues.
- An **internal log**: provides even more detailed performance data that Workday developers can analyze if needed.

Steps

1. Access the **Test Report Performance** task.
2. Select a Report Definition and click **Run**.



3. Run the **View Report Performance** task to see the logs.

Report	Execution Date	View Customer Log	View Support Log	View Internal Log
Complete Worker History for My Employees	09/08/2014 10:55:08.337 AM	View Customer Log	View Support Log	View Internal Log

The ability to test and view report performance is available to all users. For more information on the logs, please refer to:

<https://community.workday.com/node/90917>

WHERE TO GO FROM HERE

There are many resources and offerings to continue your knowledge of report writing in Workday. Some suggested classes and resources are mentioned below to further support and strengthen your Workday reporting writing experience.

For a more complete and for the latest list of options, please visit the **Workday Learning Center** and **Workday Community** for continued offerings and resources.



- Workday Calculated Fields (vILT)
- Advanced Reporting and Analytics (vILT)
- Report Designer (BIRT) (vILT)
- Basics to Advanced (ILT)
- Integrations classes
- On Demand Education (ODEs) Series (free and subscription)
- And more...

A screenshot of the Workday Community homepage. The top navigation bar includes links for "Home", "Getting Started", "Releases", "Collaborate", "News", "Calendar", "Rising 2014", and "Developers". A search bar is located in the top right. The main content area features a "Reporting And Analytics" dashboard with a lightbulb icon and a "Feature Spotlight" for "Composite Reporting Feature Spotlight". Below this are sections for "Top News", "Training", and "Upcoming Events".

- Check out the **Training Catalog** (under Getting Started/Training) for the latest training offerings.
- Checkout **Enabling Workday** (under Getting Started/Enabling Workday) to see **Next Level presentations** on reporting.
- Checkout the **Product Dashboard: Reporting & Analytics**
- Collaborate

- Join the **Reporting and Analytics** Group to share, collaborate, get answers to your reporting needs.
 - Find Forums, Submit Brainstorms, Vote on Brainstorms
 - Contribute and checkout the **Solutions Catalog** for report examples shared amongst customers
- Check out reporting How To Tips

Reporting How To Tips

Posted by jfitzpatrick2 from Workday | September 21, 2011 - 3:02pm | 2430 reads

Updated December 6, 2013 - 4:39pm

Type:  Shared Solution

Tags:  Cross Application Services | Other Utility or Solution | Reporting and Ana

Average:



No votes yet

Below are a set of how to reporting tips by functional area.

Sign up for [Workday Office Hours](#) for additional hands-on assistance.

 Add new comment  Add child page  Printer-friendly version

- Reporting Tips: Benefit Enrollment Events and Elections
- Reporting Tips: Budget to Actuals
- Reporting Tips: Customer Invoices
- Reporting Tips: Customer Payments and Customer Deposits
- Reporting Tips: Expense Reports
- Reporting Tips: Journals
- Reporting Tips: Purchase Orders
- Reporting Tips: Requisitions
- Reporting Tips: Staffing Events
- Reporting Tips: Supplier Invoices

- Checkout **Rising presentations** on Reporting tips, techniques and the power of analytics.
- Hints on testing custom reports with new Workday updates
- Complete reporting and analytics documentation also available under **Documentation: Manage Custom Reports & Analytics**

APPENDIX A – REPORT MANAGEMENT SECURITY DOMAINS

The following list captures some important security domains that drive access to different report management features and report functionality.

By configuring domain security policies you can configure which users (via security groups) can have access to a given domain. You can designate greater access to Report Administrators and also distinguish access across your report writing teams, restricting sharing options and even limiting users to temporary reports.

For more information on configuring security via domain security policies and security groups, please refer to Workday's training and documentation around Configurable Security Fundamentals.

1. Custom Report Creation
2. Custom Report Administration
3. Export to PDF and Excel
4. Manage: All Custom Reports
5. Reporting Background Processes
6. Reporting Audits
7. Reporting Functionality
8. Ability to Create Only Temporary Reports
9. Maintain Excel Template
10. Report Definition Sharing – All Authorized Users
11. Report Definition Sharing – Specific Groups
12. Report Output Sharing
13. Report Tag management
14. Report Prompt Set Management
15. Scheduled Report Processes

APPENDIX B – REPORT PERFORMANCE GENERAL GUIDELINES

The following list captures some general guidelines for report performance considerations:

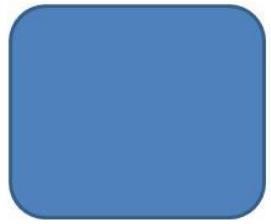
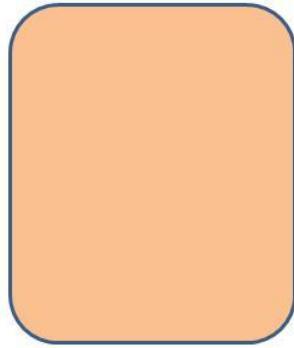
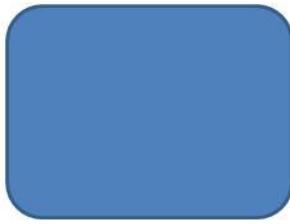
1. Reports compete for resources against other Workday tasks (e.g. Business Processes, data loads, payroll). Large reports or slow running reports can slow everything down. It is therefore imperative to benchmark and performance test your reports and design them efficiently for optimal processing.
2. **Factors** that can impact processing time:
 - i. **Data Source Selection** – choose a data that is optimized to walk the object relationships you need (e.g. Workers by Organization or My Direct and Indirect Reports or All Business Process Transactions of Type Completed in Date Range)
 - ii. **Security** of users running the report – unconstrained security groups will take less time than constrained security groups.
 - iii. **Filters** defined in the report – sequence of the filter operations and the number and complexity of filter conditions can impact the processing time.
 - iv. **Fields used for sorting** – text fields are faster than single instance fields
 - v. **Complexity of fields** in the report and the values derived (e.g. calculated fields).
 - vi. **Number of fields** in an advanced report and the **number of rows/instances** can impact performance
 - vii. **Number of group by values** in a matrix report or **number of summarizations** can impact performance
3. **Tips –**
 - i. Consider **indexed data sources** (e.g. Indexed Workers or Trended Workers) especially if number of workers being processed by report is large (e.g. customers with over 100K workers, or management reports where user manages or supports more than 10-15K workers).
 - ii. Choose the **smallest data source** you need (vs. using larger data sources that pull in larger data sets and then filtering the instances down in the report)
 - iii. Put **filter conditions** that **exclude the greatest amount of instances at the top**.
 - iv. Since a large number of filter conditions can impact performance, **consider pre-filtered data sources** where possible.
 - Use Workers by Organization vs. All Workers and adding your own organization prompt.
 - Use Business Process Transactions by Type vs. All Business Process Transactions and filtering on type
 - vi. Choose data **sources optimized for specific roles** (e.g. My Direct Reports, Workers supported by role)
 - vii. **Avoid slow running data sources**, e.g. All Business Process Transactions, All Active & Terminated Workers where possible

WORKSHOP SOLUTIONS

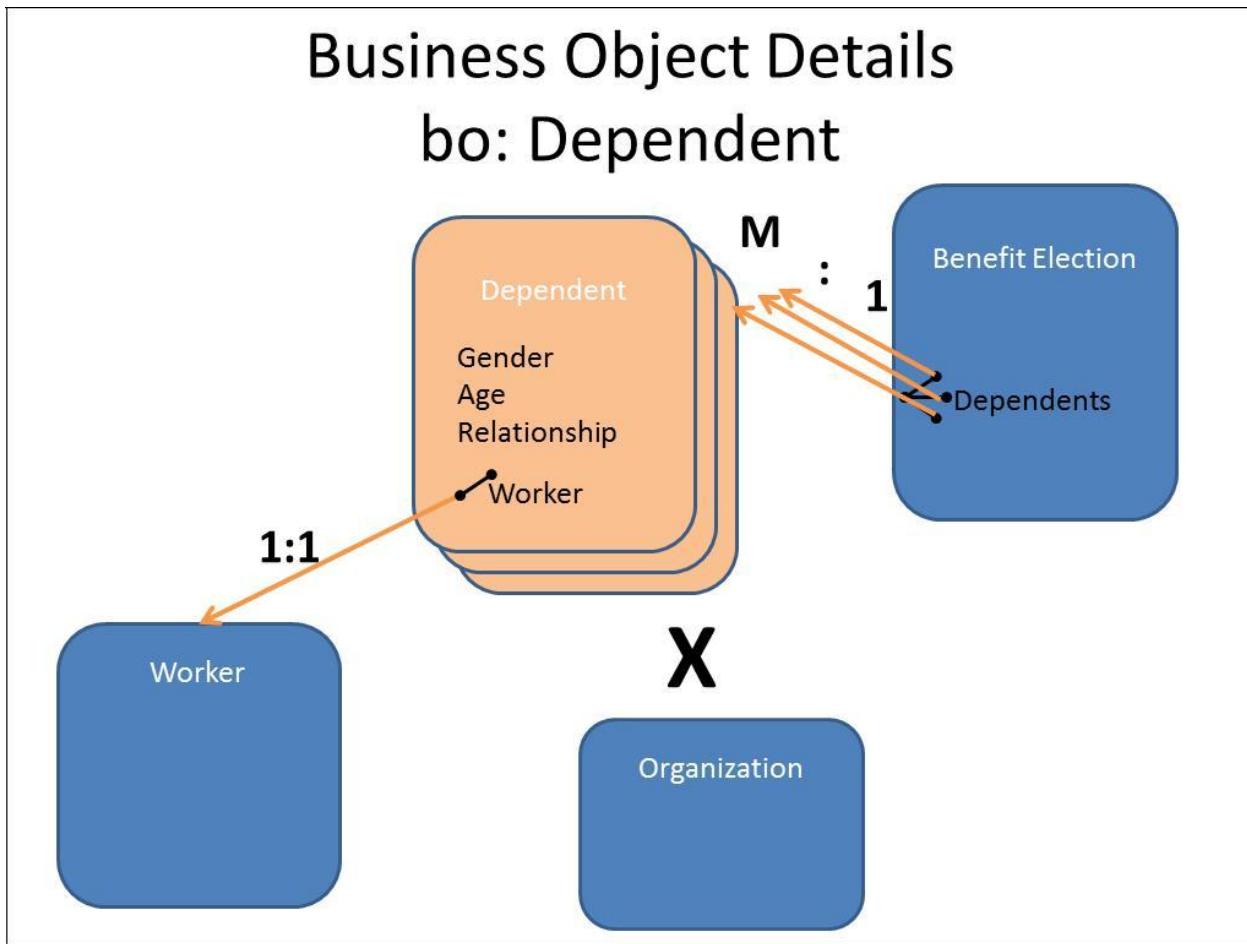
Worksheet for Business Object Details walkthrough. (for solution, see next page)

Business Object Details

bo: _____



Completed Worksheet for Business Object Details walkthrough.



Workshop WICT RW Employee Benefits report

Below you will find 2 options for the Workshop Solution

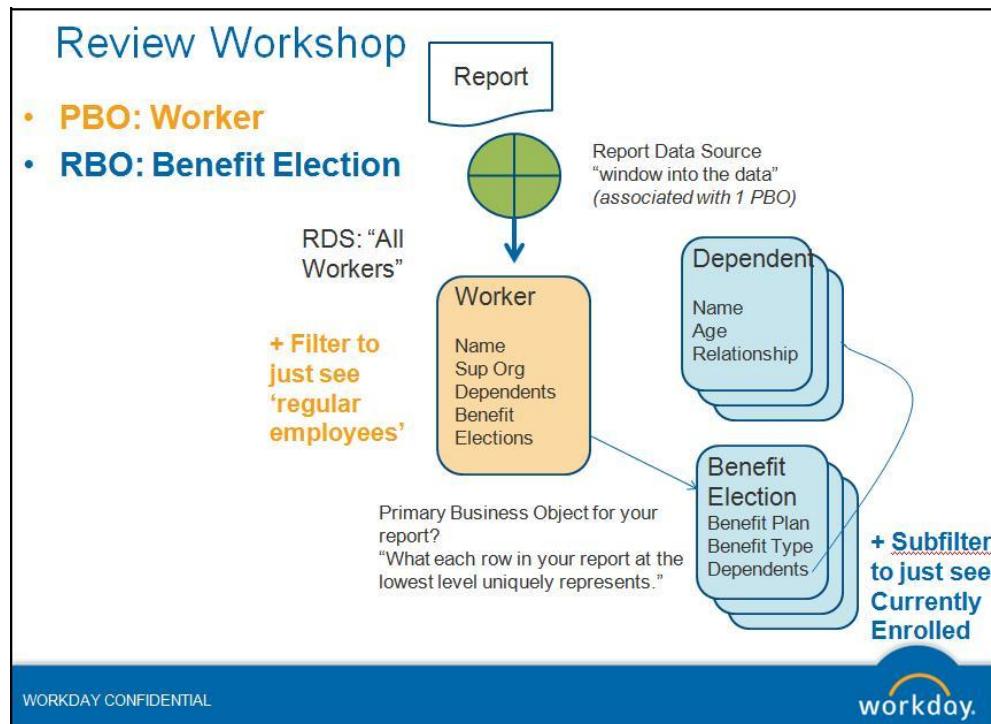
Option 1 Worksheet questions:

1. What would your PBO be? Worker (or Employee)

- i. Does it contain the **Report Fields** you need? Yes – Run Bus Obj Details report on Worker (or Employee)
- ii. What view or **Data source** do you need? All Workers (or All Active Employees – this assumes you do not want to show benefit elections for inactive employees)
- iii. Do you need to **Filter** down the instances further? Yes, we only want *Regular Employees with Benefit elections*
 - Employee type = Regular
 - Benefit elections (not empty)

2. What would your RBO be? Benefit Election

- i. Does it contain the **Report Fields** you need? Yes – run Bus Obj Details on Benefit Election
- ii. Do you need to **Subfilter** down the instances further? Yes – only want 'current elections'
 - Currently Enrolled = true



View Custom Report

WDINST RW Employee Benefits ...

Report Name: WDIRNST RW Employee Benefits
 Report Type: Advanced
 Data Source: All Workers
 Data Source Type: Standard
 Primary Business Object: Worker

(+) Additional Info

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
8 items							
Business Object	Field						
Worker	<input checked="" type="checkbox"/> Employee						
Worker	<input checked="" type="checkbox"/> Social Security Number						
Worker	<input checked="" type="checkbox"/> Management Level						
<input checked="" type="checkbox"/> Benefit Elections	<input checked="" type="checkbox"/> Benefit Provider						
<input checked="" type="checkbox"/> Benefit Elections	<input checked="" type="checkbox"/> Benefit Plan						
<input checked="" type="checkbox"/> Benefit Elections	<input checked="" type="checkbox"/> Benefit Type						
<input checked="" type="checkbox"/> Benefit Elections	<input checked="" type="checkbox"/> Date Last Changed						
<input checked="" type="checkbox"/> Benefit Elections	<input checked="" type="checkbox"/> Dependents						

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Specify the filter condition that should be used for the report							
2 items							
And/Or	(Field	Operator	Comparison Type	Comparison Value		
And		<input checked="" type="checkbox"/> Employee Type	any in the selection list	Value specified in this filter	Regular		
And		<input checked="" type="checkbox"/> Benefit Elections	is not empty				

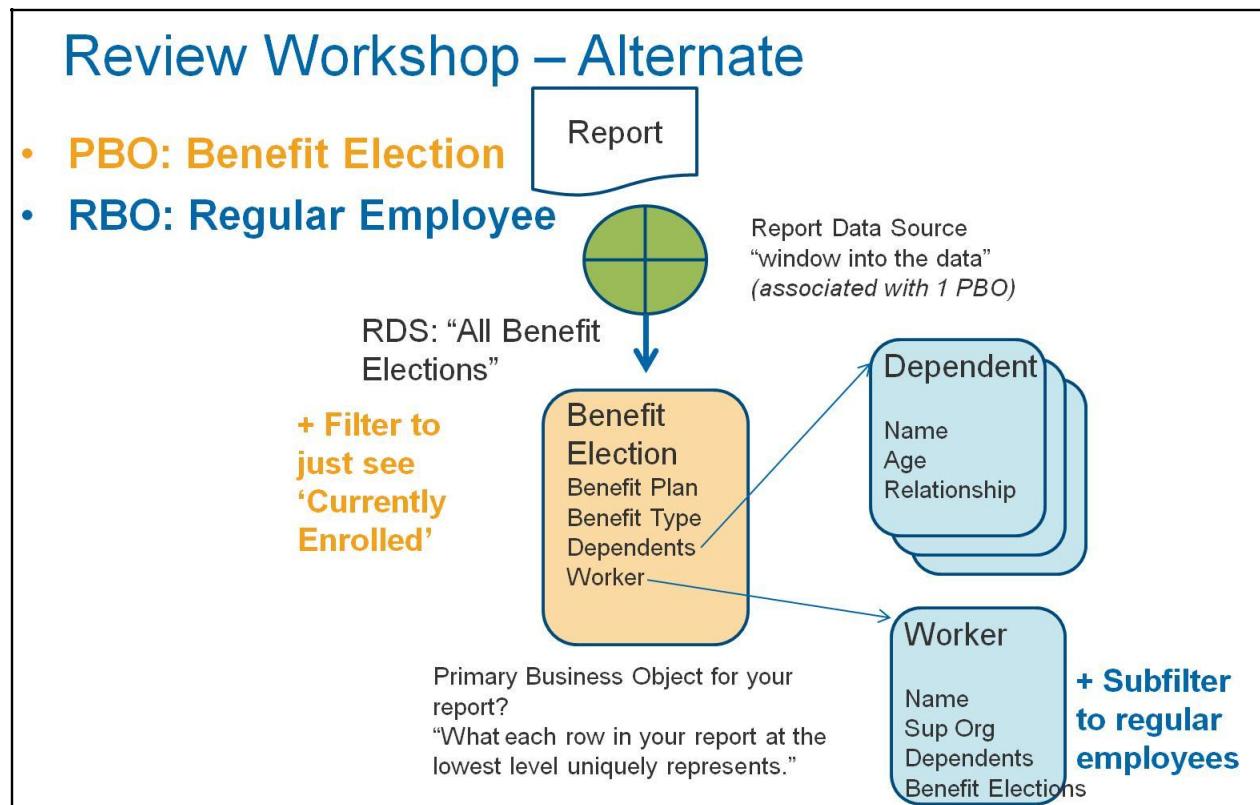
Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Sub Level Filter							
Business Object: <input checked="" type="checkbox"/> Benefit Elections							
And/Or	(*Field	*Operator	Comparison Type	Comparison Value)	
And		<input checked="" type="checkbox"/> Currently Enrolled	equal to	Value specified in this filter	Yes		

Solution report is in tenant under WDIRNST RW Employee Benefits

156 For Workday Demo Call us +91-40-65555757.

Option 2 "Alternate" Worksheet questions:

- 1. What would your PBO be? Benefit Election**
 - i. Does it contain the **Report Fields** you need? Yes – Run Bus Obj Details report on Benefit Election
 - ii. What view or **Data source** do you need? All Benefit Elections
 - iii. Do you need to **Filter** down the instances further? Yes, we only want *Currently enrolled elections for workers*
 - Currently Enrolled = true
 - Worker (not empty)
- 2. What would your RBO be? Worker**
 - i. Does it contain the **Report Fields** you need? Yes – run Bus Obj Details on Worker
 - ii. Do you need to **Subfilter** down the instances further? Yes – only want regular employees
 - Employee type = Regular



View Custom Report**WDINST RW Employee Benefits - Alternate**

Report Name: WDIRNST RW Employee Benefits - Alternate
 Report Type: Advanced
 Data Source: All Benefit Elections
 Data Source Type: Standard
 Primary Business Object: Benefit Election

Additional Info

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced																			
9 items																										
<table border="1"> <thead> <tr> <th>Business Object</th><th>Field</th></tr> </thead> <tbody> <tr><td>Benefit Election</td><td><input checked="" type="checkbox"/> Benefit Election</td></tr> <tr><td>Benefit Election</td><td><input checked="" type="checkbox"/> Benefit Provider</td></tr> <tr><td>Benefit Election</td><td><input checked="" type="checkbox"/> Benefit Plan</td></tr> <tr><td>Benefit Election</td><td><input checked="" type="checkbox"/> Benefit Type</td></tr> <tr><td>Benefit Election</td><td><input checked="" type="checkbox"/> Date Last Changed</td></tr> <tr><td>Benefit Election</td><td><input checked="" type="checkbox"/> Dependents</td></tr> <tr><td><input checked="" type="checkbox"/> Worker</td><td><input checked="" type="checkbox"/> Employee</td></tr> <tr><td><input checked="" type="checkbox"/> Worker</td><td><input checked="" type="checkbox"/> Social Security Number</td></tr> <tr><td><input checked="" type="checkbox"/> Worker</td><td><input checked="" type="checkbox"/> Management Level</td></tr> </tbody> </table>							Business Object	Field	Benefit Election	<input checked="" type="checkbox"/> Benefit Election	Benefit Election	<input checked="" type="checkbox"/> Benefit Provider	Benefit Election	<input checked="" type="checkbox"/> Benefit Plan	Benefit Election	<input checked="" type="checkbox"/> Benefit Type	Benefit Election	<input checked="" type="checkbox"/> Date Last Changed	Benefit Election	<input checked="" type="checkbox"/> Dependents	<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Employee	<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Social Security Number	<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Management Level
Business Object	Field																									
Benefit Election	<input checked="" type="checkbox"/> Benefit Election																									
Benefit Election	<input checked="" type="checkbox"/> Benefit Provider																									
Benefit Election	<input checked="" type="checkbox"/> Benefit Plan																									
Benefit Election	<input checked="" type="checkbox"/> Benefit Type																									
Benefit Election	<input checked="" type="checkbox"/> Date Last Changed																									
Benefit Election	<input checked="" type="checkbox"/> Dependents																									
<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Employee																									
<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Social Security Number																									
<input checked="" type="checkbox"/> Worker	<input checked="" type="checkbox"/> Management Level																									

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Specify the filter condition that should be used for the report							
2 items							
And/Or	(Field	Operator	Comparison Type	Comparison Value)	
And		<input checked="" type="checkbox"/> Currently Enrolled	equal to	Value specified in this filter	Yes		
And		<input checked="" type="checkbox"/> Worker	is not empty				

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Sub Level Filter							
Business Object: <input checked="" type="checkbox"/> Worker							
And/Or	(*Field	*Operator	Comparison Type	Comparison Value)	
And		<input checked="" type="checkbox"/> Employee Type	any in the selection list	Value specified in this filter	Regular		

Solution report is in tenant under WDIRNST RW Employee Benefits – Alternate

WORKSHOP #2

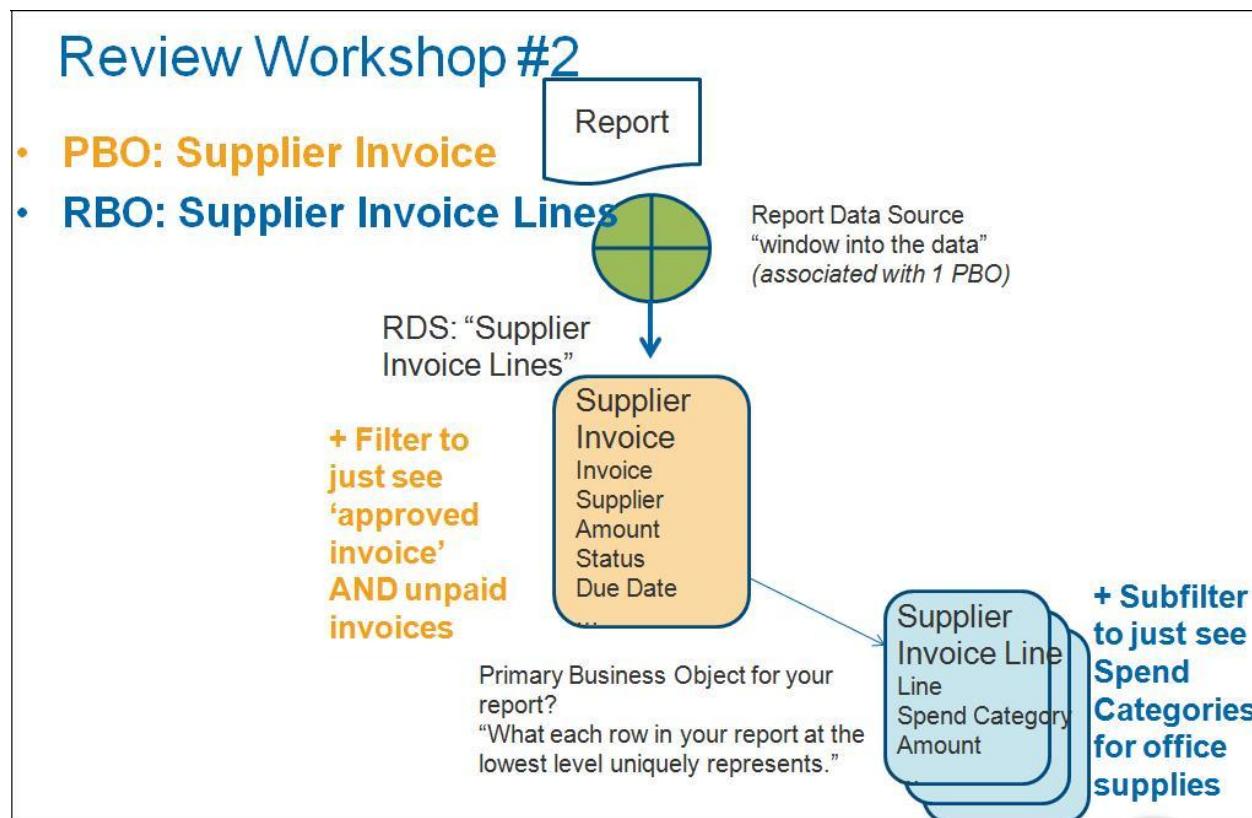
Workshop WICT RW Unpaid Supplier Invoices for Office Supplies and Furniture

1. What would your PBO be? Supplier Invoice

- i. Does it contain the **Report Fields** you need? Yes – Run Business Object Details report on the **Supplier Invoice** business object
- ii. What view or **Data source** do you need? **Supplier Invoices**
- iii. Do you need to **Filter** down the instances further? Yes, we only want *approved and unpaid invoices*
 - Document Payment Status = Unpaid or Partially Paid
 - Invoice Status = Approved

2. What would your RBO be? Supplier Invoice Line

- i. Does it contain the **Report Fields** you need? Yes – run Business Object Details on the **Supplier Invoice Line** business object.
- ii. Do you need to **Subfilter** down the instances further? Yes – only want invoice lines around spend category = Office Supplies or Office Furniture & Equipment



Data Source	Supplier Invoices						
Data Source Filter	Supplier Invoices Filter						
Data Source Type	Indexed						
Primary Business Object	Supplier Invoice Document						
Additional Info							
Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
9 items							
Business Object	Field	Format	Options				
Supplier Invoice Document	<input checked="" type="checkbox"/> Supplier Invoice Document						
Supplier Invoice Document	<input checked="" type="checkbox"/> Company						
Supplier Invoice Document	<input checked="" type="checkbox"/> Supplier						
Supplier Invoice Document	<input checked="" type="checkbox"/> Due Date						
Supplier Invoice Document	<input checked="" type="checkbox"/> Invoice Amount in Base Currency	Show Currency Symbol					
Supplier Invoice Document	<input checked="" type="checkbox"/> Document Payment Status						
Supplier Invoice Lines	<input checked="" type="checkbox"/> Supplier Invoice Line						
Supplier Invoice Lines	<input checked="" type="checkbox"/> Spend Category						
Supplier Invoice Lines	<input checked="" type="checkbox"/> Extended Amount in Company Base Currency	Show Currency Symbol					

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Specify the filter condition that should be used for the report							
3 items							
And/Or	(Field	Operator	Comparison Type	Comparison Value		
And		<input checked="" type="checkbox"/> Document Payment Status <input type="button" value="..."/>	in the selection list	Value specified in this filter	Partially Paid Unpaid		
And		<input checked="" type="checkbox"/> Invoice Status	in the selection list	Value specified in this filter	Approved		
And		<input checked="" type="checkbox"/> Supplier Invoice Lines	is not empty				

Columns	Sort	Filter	Subfilter	Prompts	Output	Share	Advanced
Sub Level Filter							
Business Object <input checked="" type="checkbox"/> Supplier Invoice Lines							
And/Or	(Field	Operator	Comparison Type	Comparison Value		
And		<input checked="" type="checkbox"/> Spend Category	in the selection list	Value specified in this filter	Office Furniture & Equipment Office Supplies		

Solution report is in tenant under WDINST Unpaid Supplier Invoices for Office Supplies and Furniture. Be sure to be logged in as Teresa Serrano (tserrano)

Activity 16 - WICT RW recruiting analysis

- a. What hiring source reports the lowest average salary? Facebook
- b. What hiring source reports the highest average salary? Employee Referral
- c. What location reports the highest average salary? Boston
- d. What is the average salary for white males in San Francisco? 117,262
- e. What is the average salary for all females in all locations? 94,398

NOTES:

