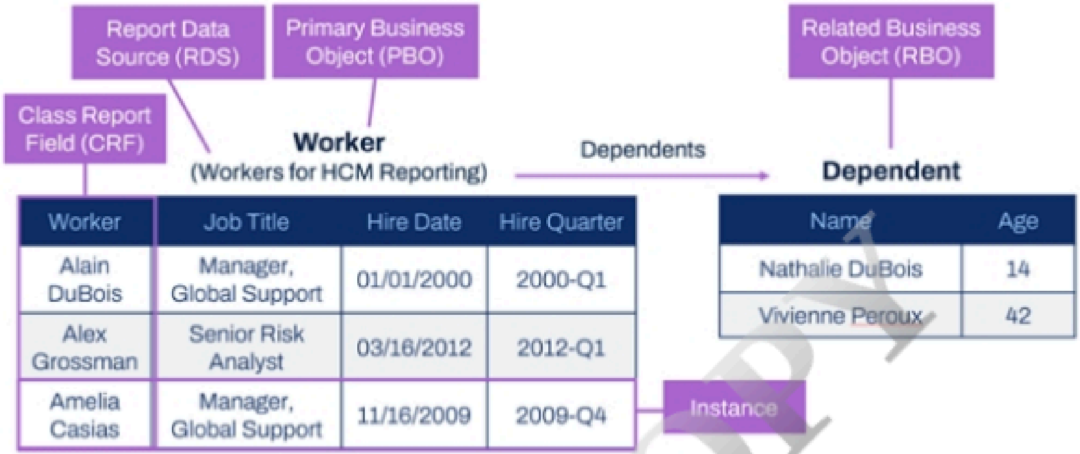


Term	Definition
Primary Business Object	The main business object for the report. It holds the data that displays in your report. The primary business object determines what fields are initially available to include in the report.
Related Business Object	Objects that have an association with the primary business object. These can have a 1:1 or 1:M relationship with the primary business object. A field on the primary business object links the two business objects together.
Report Data Source	Workday delivers data sources for some business objects. You can think of the data source as the 'view' or 'starting filter' for reporting on the given primary business object.
Class Report Fields	When working with Workday custom reports, you can select available fields (depending on your security). These fields can be Workday-delivered fields, calculated fields, or custom 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.

Report Data Sources

Workday defines and delivers the data sources in the system. Workday delivers zero, one, or multiple data sources for each business object. The report data source is the view or selection of instances of a given primary business object; this is essentially the starting data for your report.

With the exception of composite reports, you must select a single report data source when creating a report. This determines the primary business object for the report. The report displays one row for each instance of the primary business object.

For example, let's say you create a report with All Active Employees as the report data source. The primary business object for the report then is Employee. The report shows one row for each instance of Employee. Notice that Alain DuBois only appears once in the table. His dependents display as "sub-rows" and appear as a group under the Dependents heading.

Employee	Job Title	Hire Date	Hire Quarter	Dependents	
				Name	Age
Alain DuBois	Manager, Global Support	01/01/2000	2000-Q1	Nathalie DuBois	6
				Vivienne Peroux	35
Alberto Bassani	Senior Customer Services Representative	01/01/2000	2000-Q1		

If you create a report with All Dependents as the report data source, then the primary business object is Dependent. The report shows one row for each instance of Dependent. Notice that Alain DuBois appears twice in the table (once for each dependent).

Employee	Job Title	Hire Date	Hire Quarter	Name	Age
Alain DuBois	Manager, Global Support	01/01/2000	2000-Q1	Nathalie DuBois	6
Alain DuBois	Manager, Global Support	01/01/2000	2000-Q1	Vivienne Peroux	35

Both data sources let you access the same information, but the information displays differently. You need to understand how users want to view, sort, and filter the data in order to pick the best report data source for the report.

Each data source has an association with a primary business object, and has its own security. The defined access for a data source controls whether a user can create or run a custom report that uses that data source. Each data source has a list of permitted security groups. You must have access to a permitted security group to create a report using the data source or run the report. In addition, you can only share a report with users who have access to the report's data source.

There are four types of data sources:

- Standard
- Indexed
- Business View
- Prism

Standard Data Sources

Most data sources in Workday are standard data sources. A given Workday business object can have several standard data sources associated with it, each representing a different filter or selection into instances of that object. Think of the data source as a starting filter. Choose the data source that returns the smallest dataset that still includes all needed data. This is more efficient than using a data source that returns a larger dataset and applying filters to only display a subset of the data.

A data source can contain all instances of the primary business object (e.g., All Workers), or it can have built-in, Workday-defined filtering logic (e.g., All Active and Terminated Workers). If the data source has built-in filtering, the filter comparison value is either built into the data source (e.g., All Active Employees) or displays as a user prompt. In the prompt, the user enters the comparison value when running the report (e.g., Employees by Organization).

The following example shows different standard data sources for the Worker and Employee business objects. The All Workers data source returns all active, terminated, and future workers. The All Active and Terminated Workers data source returns active and terminated workers, but not future workers. The All Active Employees data source returns active employees, but not contingent, terminated, or future workers. For optimal performance, choose the data source that returns the smallest dataset that contains all needed data. If you only want to report on active employees, then choose the All Active Employees data source for a more efficient report.

Standard Data Source Performance Considerations

When selecting a data source for your report, be aware of your report's performance. There are a wide variety of standard data sources that range from very broad to very specific. However, all standard data sources cause your report to run slower than an indexed data source does. Therefore, try to select an indexed data source if it includes all the fields you need. This is especially true when reporting on large volumes of data, such as all workers in your organization.

Indexed Data Sources

Indexed data sources are a special type of data source optimized for performance, aggregation, and faceted filtering on large volumes of data. Try to use these whenever possible to get the best performing reports.

When you create a custom report using an indexed data source, a prompt enables you to select from a list of predefined filters (if available for that indexed data source). Data source filters are secured so users can only use filters they have access to.

To gain the performance benefits of indexed data sources, use indexed delivered fields. Nonindexed fields are usable but will not realize indexing benefits. Additionally, fields may be indexed for different purposes. The biggest impact to performance is using a field for grouping, aggregation, or filtering that is not indexed for those purposes. Nonindexed fields in detailed reports do not have as great an impact to the overall performance.

The following is a sample list of indexed data sources available in Workday:

• Indexed External Payroll Results • Indexed Worker for Professional Profile • Trended Workers • Expense Reports for Company • Expense Reports for Worker • Expense Report Lines for Company • Expense Report Lines for Worker • Payroll Inputs • Journal Lines • Journal Lines for Financial Reporting • Purchase Orders	• Purchase Order Lines • Project Scenarios • Project Scenario Assignments • Project Scenario Assignment Allocations • Indexed Report Run History • Supplier Invoices • Supplier Invoice Lines • Workers for HCM Reporting • All Time Blocks • All Time Clock Events

Just like with standard data sources, a given Workday business object can have multiple indexed data sources associated with it. Each indexed data source provides a different filter into instances of that object. For example, the Journal Line business object has two indexed data sources: Journal Lines and Journal Lines for Financial Reporting. The Journal Lines data source returns more instances than the Journal Lines for Financial Reporting data source. For optimal performance, you should choose the data source that returns the smallest dataset that contains all needed data.

Business View Data Sources

A business view data source is a Workday-delivered data source that blends and curates data from multiple underlying Workday-delivered data sources, known as component data sources. This simplifies reporting by presenting a focused and user-friendly perspective on your data.

Key characteristics of a business view data source include:

- **Data Blending**: It can either join or union data from its various component data sources.
- **Curation**: It curates the final list of available fields from the component data sources, which

can reduce complexity and potential confusion for report writers.

- **Filtering**: It can filter the instances (records) of data that are returned.
- **Unique Primary Business Object**: Although it pulls from multiple sources, the business view data source has its own primary business object, which typically shares the same name as the data source itself.

You can customize these data sources to fit your organization's specific needs using the Configure Delivered Business Views task. This task allows you to add, change, hide, or delete fields and update field descriptions.

Supported Functionality

You can use business view data sources to create the following types of custom reports, though some limitations apply:

- **Advanced**: Most features are supported, with the exception of Facets, Enable as Web Service, Enable for Prism, and Enable for Worksheets.
- **Matrix**: Most features are supported, but Facets, Lookup Prior Value calculations, and Enable for Worksheets are not. Drill Down and Drill By features require configuration.
- **Simple**: All features are supported.

Business view data sources cannot be used for:

- Scorecard reports
- Drill-to reports
- Workday Query Language (WQL) queries
- Dashboards
- Discovery boards

Prism Data Sources

A Prism data source is a type of data source that gets its data from a Prism Analytics table or dataset. It is typically used to blend Workday and non-Workday data for analysis.

Key characteristics of a Prism data source include:

- **User-Created**: Prism data sources are created by users within your organization, not delivered by Workday.
- **Standalone Primary Business Object**: They have their own primary business object that is

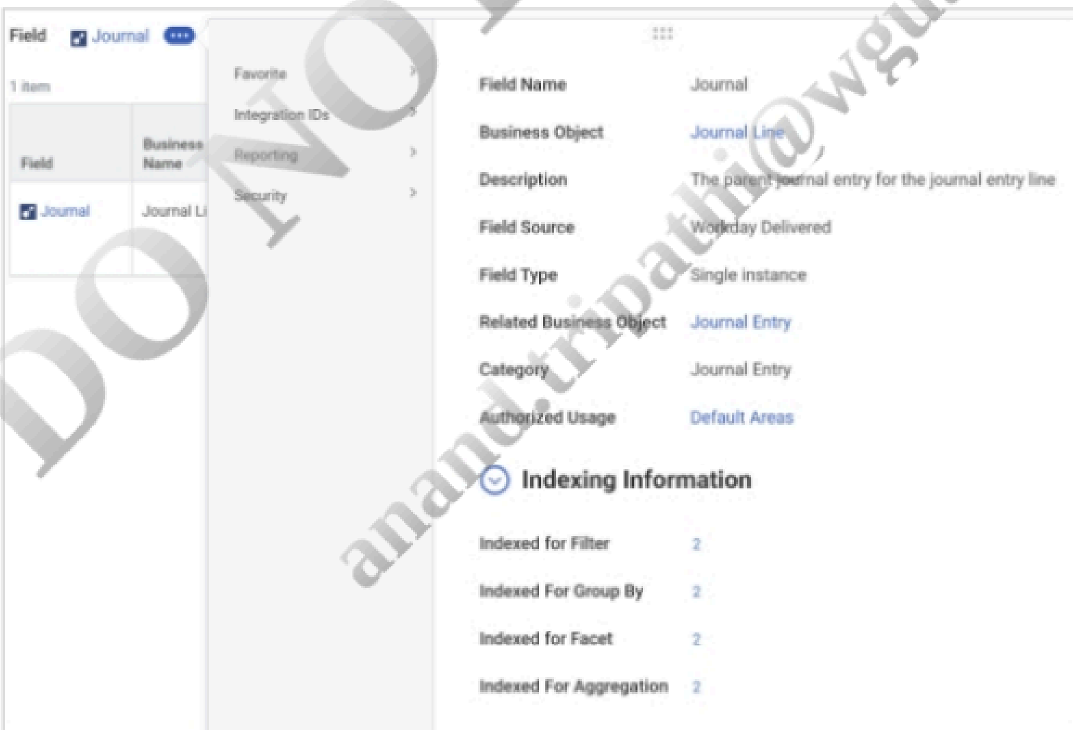
not linked to other business objects in Workday.

- **Can Be Inactivated or Deleted**: You can make a Prism data source inactive, which empties it and makes it unavailable for reporting, or you can delete it entirely if it's not in use.
- **Security**: Access to Prism data sources is controlled by security groups.
- **Limited Functionality**: They support a more limited set of report types, field types, and calculated fields compared to standard Workday data sources.

Additional Training: You can find more information in the **Prism Analytics for Administrators** course.

Indexed Report Fields

Reports that use indexed data sources typically perform faster than those using standard data sources. However, there are still some things to consider when trying to maximize your indexed report's performance. One example of this is the selection of fields for your report columns and filters. When selecting the fields for your report, you can use a field's Related Actions to display indexing information.



When creating a report with an indexed data source, try to use only fields indexed for that data source. Using nonindexed fields as columns or filters on your report hurts your report's performance and, in some cases, can cause significant slowdown.

Optimized for Performance Option

You may notice the Optimized for Performance checkbox when creating or copying a report with an indexed data source. This option appears on the following report types:

- Advanced
- Matrix
- Simple
- Transposed
- Trending

Selecting this option during report creation restricts you to adding only indexed data sources and fields to your report. This way, you can ensure that your custom report performs in the fastest way possible. Remember, even if you use an indexed data source, including nonindexed fields in your report causes the report to run in the slower hybrid mode. We explore these performance considerations later in the Appendix.

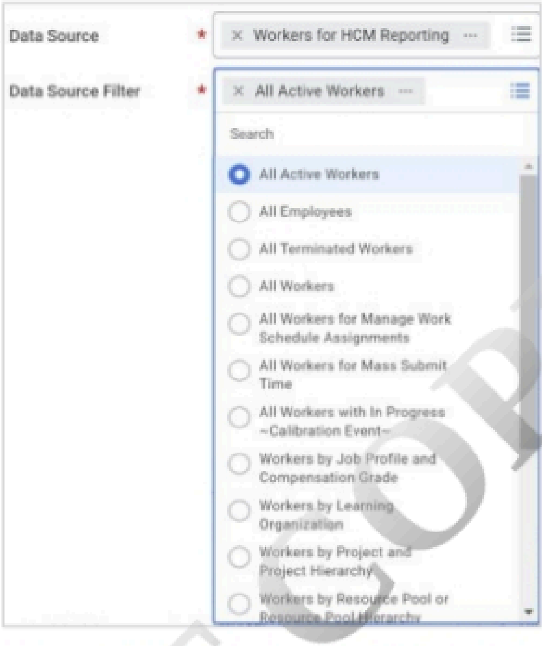
When you create a custom report, the system enables this option by default. Note that leaving this default setting restricts the fields available for inclusion in your report. Use the Business Object Details or Report Fields report to verify the indexed status of the fields you want to include in your report columns or filters.

Data Source Filters

When using an indexed data source for your report, you can identify a data source filter, which also affects your report performance. Just as a data source homes in on the data available from a business object, a data source filter limits or reorganizes data that displays in your report.

An indexed data source may have multiple data source filters. Use the Data Source Filter field to identify a valid data source filter for your report.

For example, when using the Workers for HCM Reporting indexed data source, you can use several data source filters to further refine the report data.



Just like data sources, you can use a data source filter's Related Actions to view a description of the data source filter, along with the data source and security information. These descriptions let you know if the data source filter includes additional prompts. You can also often find tips on how to best apply the data source filter.

If you plan on adding filters to your report definition, consider using a data source filter on your report. At report runtime, the system applies any filters you include on the definition. Including multiple filters can negatively impact your report performance. However, if you use a data source filter to home in on more specific data, you should not need as many filters. The data is pre-filtered before report runtime, which can vastly improve performance and let you access the specific data you need as quickly as possible.

Class Report Fields

Each business object has many Class Report Fields (CRFs). When creating custom reports, you can display, sort, filter, and create prompts for Workday-delivered fields, calculated fields, and custom fields.

Class Report Fields (CRFs) can be simple types or object types. Simple types are not actionable and appear as black text. Object types are actionable and appear as blue text. System security controls access to class report fields.

A field type icon accompanies each Class Report Field (CRF).

Icon	Definition
T	**Text** - Represents a simple text field, such as First Name.
#	**Numeric** - Represents a numeric field, such as Employee Count.
$	**Currency** - Represents a currency field, such as Base Pay.
	Date - Represents a date field, such as Hire Date.
T|F	**Boolean** - Represents a true/false field, such as Active Status.
	Single instance - Represents a one-to-one (1:1) relationship between two objects. For example, one employee can have one pay group association.
	Multi-instance - Represents a one-to-many (1:M) relationship between two objects. For example, one worker can have multiple dependents.
	Self-referencing instance: A reference back to itself. For example, a self-referencing instance of a worker identifies the worker and allows you to drill into the details and access related actions.

Determining the Primary Business Object and Data Source

To determine the primary business object and data source when creating a custom report, there are several questions to consider:

- Which business objects contain the fields needed in the report?
- If there are multiple business objects:
  - Are these business objects related?
  - Which should be the primary business object?

- Which should be the related business object?
- Which field links the two business objects together?

- Which data source should I use?

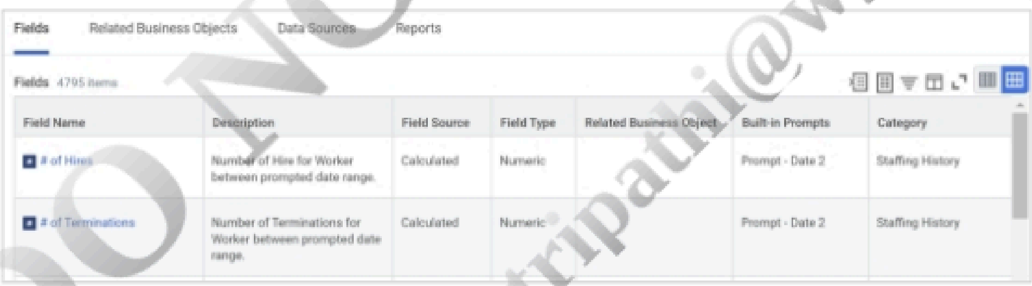
Business Object Details Report

The Business Object Details report can help you understand and navigate the Workday object model. Knowing how business objects relate to each other and which data sources are available is invaluable when building reports. We recommend starting with this report first to get an idea of what objects you might use in your custom report. You can also use this report to get a list of data sources.

When you run this report, it will first prompt you to select which business object you want to view details for. Then, the report displays up to four tabs: Fields, Related Business Objects, Data Sources, and Reports. If the business object does not contain data for one of these tabs, the system hides the tab.

Fields Tab

The Fields tab in the image below shows all available delivered, calculated, and custom fields for the business object. You can filter by a column in the report to narrow down which fields display. For example, you might filter the Field Source field to only show calculated fields.

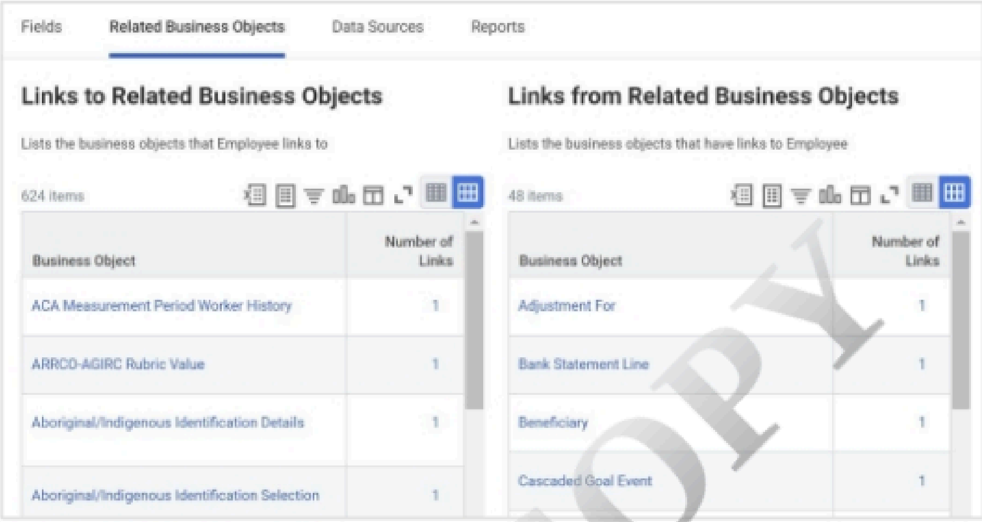

Fields Related Business Objects Data Sources Reports

Fields 4795 items

Field Name	Description	Field Source	Field Type	Related Business Object	Built-in Prompts	Category
# of Hires	Number of Hire for Worker between prompted date range.	Calculated	Numeric		Prompt - Date 2	Staffing History
# of Terminations	Number of Terminations for Worker between prompted date range.	Calculated	Numeric		Prompt - Date 2	Staffing History

Related Business Objects Tab

The Related Business Objects tab shows information about the relationships between this business object and other business objects. The tab displays two sections of information. On the left side, displays the list of business objects that this business object links to. On the right side, displays the list of business objects that link to this business object.



Note: Depending on your browser width, the Links to Related Business Objects grid may appear above the Links from Related Business Objects grid, instead of side by side.

You can select the number in the Number of Links column to check which fields link the business objects together. In the following example, there are three fields that link from the Expense Report business object to the Employee business object.

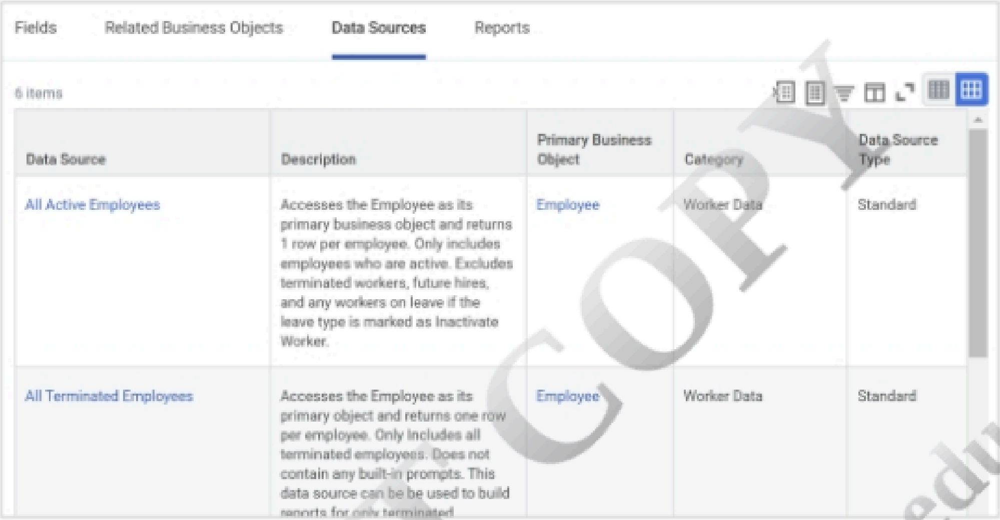
3 items

Business Object	Field	Related Business Object	Field Type	Category	Description
Expense Report	Expense Report Approved By	Employee	Multi-instance	Worker	Employees who Approved Expense Report
Expense Report	Expense Report Created By Employee	Employee	Multi-instance	Worker	Employee who entered the Expense Report.
Expense Report	Expense Report for Employee	Employee	Single instance	Payee	Employee the Expense Report applies to.

Data Sources Tab

The Data Sources tab displays available data sources for the business object. You can view more general data sources as well as more specific data sources.

Note: If the Data Sources tab does not display, then there are no delivered data sources for the business object. This means you cannot use the business object as the primary business object for a report. Consider using a related business object to access the data you need.



Data Source	Description	Primary Business Object	Category	Data Source Type
All Active Employees	Accesses the Employee as its primary business object and returns 1 row per employee. Only includes employees who are active. Excludes terminated workers, future hires, and any workers on leave if the leave type is marked as Inactivate Worker.	Employee	Worker Data	Standard
All Terminated Employees	Accesses the Employee as its primary object and returns one row per employee. Only Includes all terminated employees. Does not contain any built-in prompts. This data source can be be used to build reports for only terminated	Employee	Worker Data	Standard

Reports Tab

The Reports tab displays reports in the tenant (both standard and custom) that use the given business object. You can use these reports as a reference when writing reports for this business object.

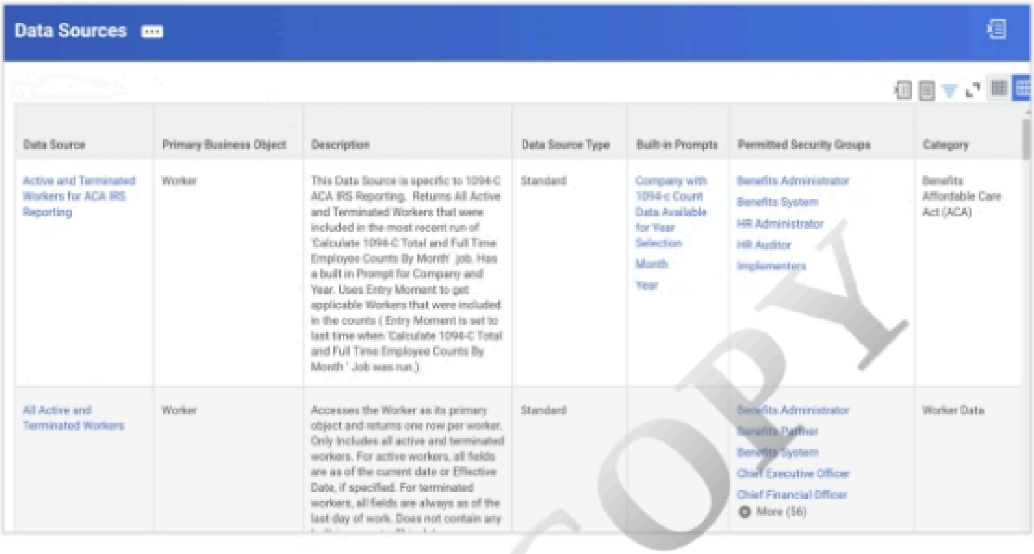
You can select the Reports Displaying Business Object at Second-Level button to display the reports that include this business object as a related object.

Data Sources Report

Another useful research report is the Data Sources report, as shown in the image below. This report helps you understand:

- Whether a data source is standard or indexed
- If the data source includes built-in prompts
- Permitted security groups for the data source

You can filter the report by category to narrow down the data sources.


Data Sources

Data Source	Primary Business Object	Description	Data Source Type	Built-in Prompts	Permitted Security Groups	Category
Active and Terminated Workers for ACA IRS Reporting	Worker	This Data Source is specific to 1094-C ACA IRS Reporting. Returns All Active and Terminated Workers that were included in the most recent run of 'Calculate 1094-C Total and Full Time Employee Counts By Month' job. Has a built in Prompt for Company and Year. Uses Entry Moment to get applicable Workers that were included in the counts (Entry Moment is set to last time when 'Calculate 1094-C Total and Full Time Employee Counts By Month ' Job was run.)	Standard	Company with 1094-c Count Data Available for Year Selection Month Year	Benefits Administrator Benefits System HR Administrator HR Auditor Implementers	Benefits Affordable Care Act (ACA)
All Active and Terminated Workers	Worker	Accesses the Worker as its primary object and returns one row per worker. Only includes all active and terminated workers. For active workers, all fields are as of the current date or Effective Date, if specified. For terminated workers, all fields are always as of the last day of work. Does not contain any	Standard		Benefits Administrator Benefits Partner Benefits System Chief Executive Officer Chief Financial Officer More (56)	Worker Data

Report Fields Report

Use the Report Fields report to investigate:

- What fields exist on a business object.
- What business objects are anchored to a certain field.
- Aspects of a report field including type, description, RBO, built-in prompts, and so on.

Upon running the report, you are prompted for Report Field and Business Object. Neither prompt is required.

Report Fields

Business Object Worker

Field	Business Object Name	Description	Field Source	Report Field Type	Related Business Object	Built-in Prompts
(Active) Relocation - Long Term Areas	Worker	The active relocation areas that the employee is willing to relocate to in the long term.	Workday Delivered	Multi-instance	Relocation Area	
(Active) Relocation - Short Term Areas	Worker	The active relocation areas that the employee is willing to relocate to in the short term.	Workday Delivered	Multi-instance	Relocation Area	
% Female Leadership	Worker		Calculated	Numeric		
% of Annual Flex Credits Used	Worker		Calculated	Numeric		
% Variance from 10th Percentile Base Salary - Average	Worker		Calculated	Numeric		

Contextual Reporting

You can use contextual reporting in Workday when you are not sure of the business object and report fields for the data you want to report on.

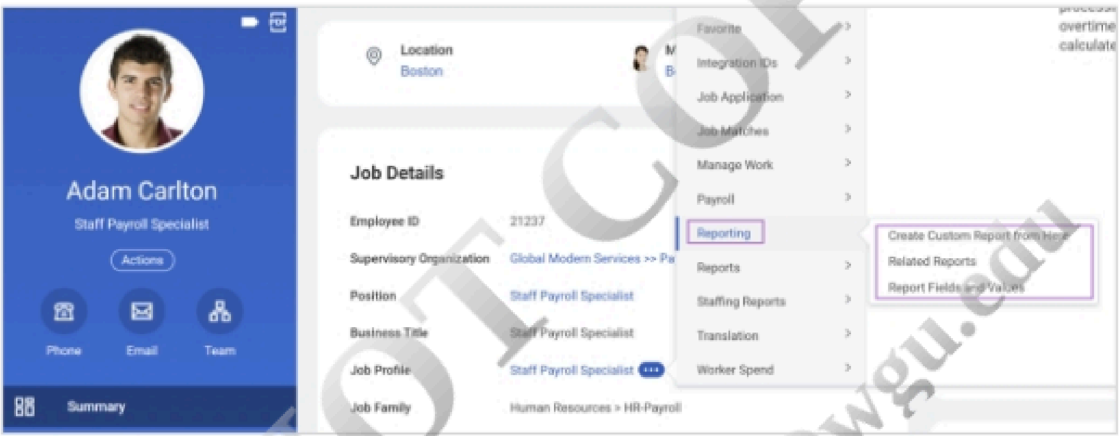
You can also use contextual reporting to view existing reports you may want to repurpose or customize.

From any object's Related Actions icon, select Reporting to access three choices:

Related Action	Definition
Create Custom Report from Here	Create a custom Report Writer report with the selected object as the basis for the data available. Workday automatically restricts the data sources available for the report to those associated with the object.
Related Reports	Displays all reports, whether custom or Workday-delivered, that use the selected business object as the primary object on the report.

Report Fields and Values	Displays all the report fields and values related to the selected business object. This option only displays fields that you can access. You can sort, filter, and export the fields to Excel. This helps you become familiar with the Workday fields by viewing them within the context of your own data.

The image below displays the job profile for an employee. Using contextual reporting, you can either (1) create a custom report about compensation changes, (2) see related reports that are about compensation changes, or (3) see all the report fields and values around a compensation change event.



Designing a Custom Report

There are several questions to consider when designing a custom report before building it:

- Where is the data I need?
- What view of the data do I need?
- What fields should display?
- How should the data group or sort?
- How should I filter the data?
- How should the output display?
- Who is this report for? Who should I share the report with?
- Is there an existing report that I can use as a starting point?

You can use the Create Custom Report task to create a custom report. When creating a report, you must specify the Report Name, Report Type, and Data Source. You can also select the Temporary Report and Enable as Web Service options, which we explore later in this chapter.

Reminder: A user's access to data sources drives data source selection for the report.

Note: Selecting the data source determines the primary business object for the report. Once you define the primary business object for a report, you can only change the report's data source to another data source on the same primary business object. You cannot change the primary business object for a report.

Report Name

You should establish a naming convention as a best practice to make your reports easy to find.

Report Types

Workday Report Writer provides several report types for creating custom reports and custom analytic solutions. You use the advanced and matrix report types most commonly.

Report Type	Definition
Simple	Simple reports provide straightforward design options for the occasional user to create reports quickly and easily with limited options. You can display, sort, and filter data from a primary business object. These reports are not shareable.
Advanced	Advanced reports allow you to display data from the primary and related business objects. These reports are shareable. You can sort and filter the data, show groupings, and display sub- and grand totals. You can also add charts and enable the report as a worklet or web service.
Matrix	Matrix reports allow you to group data, summarize the metrics for each grouping, and drill into the summarizations for further analysis. In addition, matrix reports also provide for filtering, charts, worklets, and report sharing.
Composite	Composite reports enable you to combine data from multiple data

	sources into a single report by using advanced or matrix subreports.
Search	Search reports display search results based on facet-filter selection values.
nBox	nBox reports count data and display the results in a two-dimensional matrix.
Trending	Trending reports enable you to report on and analyze trends in worker data, such as headcount and attrition over a period of time.
Transposed	Transposed reports interchange the rows and corresponding columns on the report, allowing you to create reports that enable side-by-side comparisons.

Data Sources

When creating a custom report, the most important decision is selecting your data source. The data source drives the primary business object and view of the data. Data sources provide the starting filter for your report. You can search for data sources by name, category, business object, or a combination of category and business object.

Workday defines and delivers one or more data sources for most business objects.

Temporary Report

When you create a report, you can select the Temporary Report checkbox to designate it as temporary. When you mark a report as temporary, it has a defined period of time before it expires and becomes eligible for deletion in the tenant. By default, a temporary report expires after seven days. For reports that are not the Simple report type, you can change the expiration information on the Advanced tab.

Use the Delete Temporary Report Definitions task to delete temporary reports in a tenant that have expired and are eligible for deletion. You can schedule this task to run once, or on a daily, weekly, or monthly recurrence. This process permanently purges expired reports from your Workday tenant.

Security Note: You must have access to the Custom Report Administration security domain to schedule reports for deletion.

Note: If you create a custom report and then cancel the report, or if your session times out, your report is saved as a temporary report. Delete the report or change the report options so it is no longer a temporary report.

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. Report Administrators can still access these temporary reports to mark them as permanent or change the expiration dates as needed.

Security Note: Users associated with security groups configured for the Ability to Create Only Temporary Reports security domain are limited to just temporary reports. This access can support ad hoc reporting needs and can help separate groups of report writers in the tenant.

Web Service Enabled

Selecting the **Enable as Web Service** checkbox allows the custom report to be used in an outbound integration (Reporting-as-a-Service (RaaS)), and makes the report available to the Business Intelligence Reporting Tool (BIRT) and PRISM Analytics. You can configure additional web services options on the Advanced tab.

Custom Report Tabs

When creating a custom report using the Advanced Report type, configure the report using these tabs:

Option	Description
Columns	Select the fields to include on the report and specify their sequence. The Columns grid contains one row for each column. In each row, define the business object, field, column heading overrides, and options for how the field should display. Security Note: You can only add fields that you have access to.

Sort	Control the order to present and group data. This tab applies sorting for data on the primary business object and subsorting for data on related business objects. You can also specify options for displaying subtotals, grand totals, and outlines. Advanced reports sort data based on a unique ID for efficiency. In other report types, if you do not specify sorting or grouping criteria, sorting is based on the first (left-most) column associated with the primary business object.
Filter	Add conditions to filter the primary business object.
Subfilter	Add conditions to filter the related business objects. You can add subfilters for multiple related business objects.
Prompts	Specify prompt-related data about your report, including populating undefined prompt values. You can set default values for prompts, so users do not have to enter values when running a report. You can also hide prompts that have default values, so that they do not appear to users at run time.
Output	Override the default output options, including output type, worklet options, and help text. By default, a custom report renders as a table. You can change this to display the report as a chart, chart and table, or gauge. By default, the system does not enable custom reports for use as worklets, but you can change this setting.
Share	Share the report with other users or groups. By default, only the report owner can view a custom report. You can only share a report with users who have access to the report data source. Sharing a report allows other users to run and copy the report.
Advanced	Defines additional report options. Some include enabling save parameters, enabling a report as a web service, enabling a report for Worksheets, or changing the expiration information for temporary reports.

Adding Fields from Related Business Objects

You already know how to add fields from the primary business object. Depending on the report type, you can also add fields from related business objects. On the Columns tab, you specify the business object and field for the related data. A given custom report definition can include fields from more than one related business object. Additionally, you can select a field that links the PBO and RBO together.

In the following example, the Dependents field links a report using the Worker PBO to the Dependent RBO. This allows you to pull fields from the RBO into your report as well.

Note: When building a report using the Advanced report type, you can only access fields from related business objects that are one level deep. To access fields from RBOs that are more than one level deep, you need to create a calculated field.

Activity 1.2 - Create a Custom Report

Business Case: Logan is ready to create a new custom report about active employees that includes information about their dependents.

Task #1: Create a Custom Report

1. Sign in as Logan McNeil (*lmcneil*).
2. Access the **Create Custom Report** task.
3. Enter the following information:

Field Name	*Entry Value*
Report Name	WICT Employee and Dependents
Report Type	Advanced
Data Source	Workers for HCM Reporting
Optimized for Performance	(clear)

4. Select **OK**.
5. In the Data Source Filter field, select **All Employees**. This will replace the current value.
6. On the Columns grid, select the **Add Row** icon five times.
7. Enter the following information:

Business Object	*Field*
Worker	Employee
Worker	Job Title
Worker	Hire Date
Worker	Hire Quarter

Dependents	Name
Dependents	Age

Important: When adding rows, the Worker Business Object defaults in the Business Object Column. Remove Worker and add Dependents for the last two rows.

8. Select **OK**.
9. Select **Run**. The prompts that appear are associated with the All Employees data source filter.
10. Leave the prompt values blank and select **OK** and review the report results.

Note: The report name to check your report configuration in the tenant is WDINST Employee Details.

The report results have the same columns, but not the same sorting. The WDINST report is used for later activities, and shows results as of the last activity the report is used.

Activity Complete

Scenario

Logan McNeil needs to create a report that shows expense report data for all active employees. The following table shows the fields she needs to display in the report.

Worker	Supervisory Organization	Location	Locale	Expense Report	Expense Items on Expense Report	Expense Report Total Amount
Salim Chabani	Call Center	Mulhouse	fr_FR			
Boris Muller	Consulting	Munich	de_DE	EXP-4960	Airfare Hotel	€1,380.14
Carol Abbott	Consulting	Chicago	en_US	EXP-3598	Airfare	$1,040.50
				EXP-3916	Hotel	$731.50

The report output should sort first by the supervisory organization and second by the worker. The expense reports for each worker should sort by the total amount.

Activity 1.3 - Determine the Primary Business Object and Data Source

Business Case: Logan McNeil needs to create a custom report that shows expense report data for all active employees. She needs to display these fields in the report:

- Worker
- Supervisory Organization
- Location
- Locale
- Expense Report
- Expense Items on Expense Report
- Expense Report Total Amount

Before creating the report, she needs to determine the primary business object and data source for her report.

Task #1: Explore Business Objects

1. Sign in as Logan McNeil (*lmcneil*).
2. Use the Business Object Details and Data Sources reports to determine the primary business object and data source for Logan's report.

Task #2: Answer Report Configuration Questions

After determining the report configurations, answer the following questions:

1. Which business objects contain the fields needed in the report?
2. Are these business objects related?
3. Which should be the primary business object?
4. Which should be the related business object(s)?
5. Which field links the primary and related business object together?
6. Which data source and data source filter should Logan use?

Activity Complete

Activity Answer - Determine the Primary Business Object and Data Source

Task #1: Explore Business Objects

1. Sign in as Logan McNeil (*lmcneil*).
2. Access the **Business Object Details** report.
3. Select **Worker** in the Business Object field.
4. Select **OK**.
5. Filter the Field Name column by **Worker**, **Supervisory Organization**, and **Location**. Verify that these are Workday-delivered fields. Ignore the other Worker instances that filter that are Custom Fields.
6. Select the **Related Business Objects** tab.
7. In the Links to Related Business Objects table, filter the Business Object field by **Expense Report** and **Location**.
8. Select the number in the Number of Links column for Expense Report. Notice that the Expense Reports - All Statuses field is a multi-instance field that contains all expense reports for the worker.
9. Close the pop-up box.
10. Select the number in the Number of Links column for Location. Notice that the Location field is a single instance field that contains the location for the worker.
11. Close the pop-up box.
12. Hover over the **Expense Report** link.
13. Right-click and select **See in New Tab**.
14. Filter the Field Name column by **Expense Report**, **Expense Items on Expense Report**, and **Expense Report Total Amount**. Verify that these are Workday-delivered fields.
15. Close the tab for the Expense Report business object.
16. On the tab for the Worker business object, hover over the **Location** link.
17. Right-click and select **See in New Tab**.
18. Filter the Field Name column by **Locale**. Verify that this is a Workday-delivered field.
19. Close the tab for the Location business object.
20. Select the **Data Sources** tab for the Worker business object.
21. Filter the Data Source column by **Workers for HCM Reporting**.

22. Hover over the **Workers for HCM Reporting** link.

23. Right-click and select **See In New Tab**.

24. In the Data Source Filter section find the **All Employees** data source filter.

25. Right-click and select **See In New Tab**.

Task #2: Answer Report Configuration Questions

After determining the report configurations, answer the following questions:

1. Which business objects contain the fields needed in the report?
The Worker business object contains the Worker, Supervisory Organization, and Location fields.
The Location business object contains the Locale field.
The Expense Report business object contains the Expense Report, Expense Items on Expense Report, and Expense Report Total Amount fields.

2. Are these business objects related? Yes

3. Which should be the primary business object? Worker

4. Which should be the related business objects? Location and Expense Report

5. Which field links the primary and related business object together?
The Location field links the Worker business object to the Location business object.
The Expense Reports - All Statuses field links the Worker business object to the Expense Report business object.

6. Which data source should Logan use? Workers for HCM Reporting, with the All Employees data source filter.

Chapter Summary

Key Takeaways:

- Reports in Workday are built-in application features.
- You can copy Report Writer standard reports, but not XpressO standard reports.
- You can use report tags to easily find reports.
- The RDS determines which PBO the report uses.
- You can add fields from the PBO and the RBOs to the advanced type report.
- Class report fields can be simple types or object types.

Chapter 1 Knowledge Check

1. What does your data source selection determine for a report?
    a. PBO
    b. Report Sharing
    c. The PBO, Starting dataset, and Report Sharing
    d. The number of rows displayed in the report output.
2. Which type of Class Report Field displays all expense lines for an expense report?
    a. Self-Referencing
    b. Multi-Instance
    c. Single Instance
    d. Currency
3. Which report can be used to find delivered Workday reports by category?
    a. All Custom Reports
    b. Workday Standard Reports
    c. Data Sources
    d. Report Fields