Chapter 7 - Worklets and Dashboards

Overview

Worklets provide users quick access to frequently referenced data and tasks common to a specific functional area. Workday delivers worklets typically found on the Home page, such as Pay or Benefits. Worklets on the Home page are also referred to as Applications. Workday can enable custom reports as worklets for use on landing pages and dashboards, allowing users quick access to key reports and analytics. In addition, embed reports in a business process to provide context to the task and enable users to make informed decisions. Display reports on mobile dashboards for easy access to analytics anywhere. This chapter will focus on deploying custom reports as worklets.

Dashboards allow you to easily organize and deploy data to target audiences. You can configure Workday delivered dashboards, and custom dashboards to display groups of custom reports enabled as worklets. You can also use Workday dashboards for more than worklets and analytics. Configure menus and announcements to allow users to access not only reports, but also key tasks, links, and announcements.

Objectives

By the end of this chapter, you will be able to:

- Enable a report as a worklet.
- Configure the design of a worklet to align with dashboard requirements.
- Troubleshoot why users cannot access a dashboard.
- Add a worklet to an existing dashboard.
- Configure prompt sets for dashboards.
- Create custom dashboards that display visual data across multiple tabs.
- Configure menus and announcements.
- Explain how to embed a report into a business process.

Worklet Configuration

Workday displays worklets as a "tile" (square) on dashboards and as a "bubble" (circle) on a landing page (i.e., Home and Workbench). You can enable custom reports as worklets and configure them on landing pages or dashboards. You can also enable advanced, matrix, nBox, transposed, trending, and composite report types as worklets. However, you cannot enable search and simple report types as worklets.

When viewing a report as a worklet, there are a few settings available. Select the Configure icon to access the worklet options. Options can include:

- Refresh: Refresh the data manually.
- Edit Settings: Modify the report prompts if there are any available.
- Restore Default Settings: Return to the default settings, if any.
- Show Chart/View Table: Show the report in chart or table form instead.
- Download to Excel: Save the report to an Excel workbook.
- More Information: View help text, if configured.
- View More: Return the report configured in the Maximize Report Options field.

Enable a Report as a Worklet

You must enable a report as a worklet before you add it to a dashboard or landing page. To enable a custom report as a worklet, go to the Output tab of the report definition and configure the Worklet Options. The available worklet options are:

Field	Description
Enable as Worklet	Allow the report to be output as a worklet.
Available on	Specify where the worklet will be available to add. Options include landing pages, dashboards, and mobile reports.
Maximum Number of Rows	Control the amount of data output on the worklet. The default is 10 rows and the maximum is 100.
Maximize Report Options	When you select the View More option for the worklet, specify which report to execute. By default, the same report will run, however, you can specify a different report using this field.
Refresh Data	Indicate if the worklet should refresh the data every time the user accesses the worklet or just once per sign-in.
Worklet Icon	Specify a worklet icon to display as the "bubble" on a landing

	page.
Options	Specify options for hiding the table border or column headings.

Design Considerations

There are several items to keep in mind when designing reports for use as a worklet.

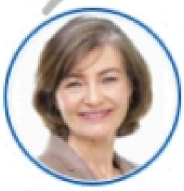
- Prompts: Configure prompt defaults.
- Space (100 rows displayed): Use charts, sort and filter, and suppress columns.
- Performance (30 seconds): Design your report efficiently and use an indexed data source to reduce performance times.

A best practice is to configure prompt defaults when enabling a report as a worklet if the custom report prompts the user for a value. Report output should display automatically when accessing the page.

Due to space restrictions, consider the amount of data output and number of fields configured. The system restricts worklets to displaying a maximum of 100 rows when displayed as a worklet on a landing page. You can use charts to visualize data and convey a lot of information in a small space. Additionally, sort sequence and filter criteria can help ensure only the essential data is output. A best practice is to start small, giving the user just enough information to determine if they need to select "View more... " to display the maximized report. Optionally, configure a given field (report column) not to display when executed as a worklet. This option becomes available for reports enabled as worklets.

Design worklets to load in less than 30 seconds or else they will not render on a landing page or dashboard. Choose an efficient report design for both performance and display. You can configure up to six worklets on a dashboard tab with a maximum of six tabs.

Scenario



Teresa wants to add a report to the Auditor dashboard that displays a list of expense reports without attachments.

Modify an existing report to be better suited for dashboard use:

- Remove any columns?
- Indicators?
- Heading overrides?
- Sort?
- Filter?

Solution:

To check your work, compare your report to the WDINST Expense Reports Without Attachments custom report in your training tenant.

Activity 7.1 - Enable a Report as a Worklet

Business Case: Teresa needs to add the Expense Reports without Attachments report to the Auditor dashboard. She needs to modify the report, enable the report as a worklet, and add an analytic indicator.

Task #1: Review Existing Report

1. Sign in (or Start Proxy) as Teresa Serrano *(tserrano)*.
2. Run the **Expense Reports without Attachments** report using the default prompt value. Notice the output returns too many instances to be a good candidate for a worklet.

Task #2: Create Analytic Indicator

1. Access the **Create Analytic Indicator** task and configure as follows:

Field Name	Entry Value
Business Object	Expense Report
Field	Expense Report Total Amount
Display Option Name	3000 Flag
Visualization Type Default Visualization	Flag No visualization

2. In the Display Conditions grid, **add** a row.
3. Enter the following:

Control Field	Condition	Condition Value	Visualization
Expense Report Total Amount	greater than or equal to	3000	Orange flag

4. Select **OK** to save the analytic indicator.

Task #3: Enable Report as Worklet

1. Run the **Copy Custom Report** task.
2. In the Report Name field, select **Expense Reports without Attachments**.
3. Select **OK**.
4. Name the report *WICT Expense Reports without Attachments*.
5. Select **OK**.
6. From the Columns tab, **remove** the Attached Receipt Images row.
7. Configure the Columns grid as follows:

Field	Column Heading Override	Options
Expense Report Payee		
Expense Report		
Expense Report Date	Date	
Expense Report Total Amount	Total Amount	3000 Flag

8. Select the **Sort** tab.
9. **Remove** the existing sort row and **add** a new row.
10. In the Field column, select **Expense Report Date**.
11. In the Sort Direction column, leave **Alphabetical - Ascending**.
12. Clear the **Display Grand Totals** checkbox.
13. Select the **Filter** tab.
14. Edit the existing Expense Report Date filter with the following information:

Field Name	Operator	Comparison Type	Comparison Value
Expense Report Date	greater than or equal to	Prompt the user for the value	Starting Prompt

15. **Add** another row just below the one you updated.

16. Enter the following:

Field	Operator	Comparison Type	Comparison Value
Expense Report Date	less than or equal to	Prompt the user for the value	Ending Prompt

17. Select the **Output** tab.

18. Expand the **Worklet Options** section.

19. Enter the following:

Field Name	Entry Value
Enable As Worklet	(select)
Available on Maximum Number of Rows	Home Auditor 30
Maximum Report Options Refresh Data	Display this Worklet when Maximized *(default)* Every sign in *(default)*
Worklet Icon	Triangle

20. In the **Help Text** section enter the following in the More Info field: *This report shows expense reports without attachments in the entered date range.*

21. In the report header section at the top of the Report Definition, expand the Additional Info section. This is located below the Data Source and Primary Business Object selections. Enter the same statement in the previous step into the Brief Description field.

22. Select **OK** and **Run**.

23. In the Starting Expense Report Date prompt, enter *01/01/2023*, and in the Ending Expense Report Date prompt, enter *12/31/2023*.

24. Select **OK**. Notice how many instances display for this date range.
25. Navigate to the Home page and select the **Menu** button. Notice the WICT Expense Reports without Attachments worklet does not appear because we haven't added it to the Home page.
26. Scroll down to the Organization section, and select the **Dashboards** worklet and select the **Auditor** dashboard. Notice the worklet does not appear because you have not yet added the worklet to the dashboard.

Activity Complete

User-Level vs. Tenant-Level Worklet Configuration

Workday configures worklets manually, by user, on landing pages or dashboards. Also, users can set the worklets as optional or required for authorized security groups at the tenant level.

User Level – Manual Configuration

A user can manually configure worklets on a landing page or dashboard if:

- The user can access the landing page or dashboard.
- The user can access the worklet (e.g., the user owns or shares the custom report).
- The user allows the worklet for that landing page or dashboard. Notice the "Available on" configuration in the report definition/worklet options.

To configure worklets on landing pages or dashboards at the user level, select the Configure this page icon. You can find the icon in the upper right corner of the landing page or dashboard. Add, remove, or reorder worklets allowed for that landing page or dashboard.

You cannot manually configure required worklets (defined at the tenant level). Only users with security access to the worklet can configure and add worklets (i.e., reports shared with them or reports they own).

Tenant Level

You can configure worklets as optional or required for authorized security groups at the tenant level if:

- You allow the worklet for that landing page or dashboard. Notice the "Available on" configuration in the report definition/worklet options.
- The worklet (custom report) owner shares with security groups.

Use the Maintain Dashboards report to configure required and optional worklets for a given landing page or dashboard. Use of the Maintain Dashboards report requires access to the Setup: Tenant Setup - Worklets domain.

Editing a dashboard from this task allows you to configure worklets on that dashboard or landing page, as well as control the worklet display size. You can configure optional and required worklets for all authorized or specific security groups. Authorized security groups include security groups with access to the worklet.

Field	Description
Required for Groups	This field specifies the security group that can access to the worklet.
Required?	Selecting this checkbox makes the worklet required for the authorized security groups listed in the Required for Groups field. If you do not select the checkbox, the worklet is optional for the listed security groups.
Worklet Sizing	You can select 1x or 2x to control the size of the worklet on the page. The size of the worklet will respond to the available viewing area.
Worklet Title	Specify a worklet title here (different from the report name.) This worklet title only displays on a dashboard and not when the report runs independently.

You can only configure custom worklets at the tenant level when the custom report owner shares the worklet with other security groups.

Security

As we have seen, the user needs access to the landing page or dashboard as well as worklet access (custom report).

Dashboard Security

Workday secures dashboards and landing pages to domains. A user must belong to a security group with permissions to the domain securing the landing page or dashboard in order to view the page.

To determine the domain securing a given dashboard, select Edit and access the Settings tab from the Maintain Dashboards report.

You can also get security information for the dashboard using a valuable security report called View Security for Securable Item. This report will also show you the securing domain as well as the permitted security groups for the domain. Remember that security in Workday is configurable.

You can edit domain security policies to add or remove security groups to meet your requirements.

1. Run the **View Security for Securable Item** report.
2. Enter the name of the landing page or dashboard.
3. Select **OK**.
4. Find the desired landing page or dashboard.
5. Select **View Security**.
   A. Delivered dashboards show as: (Report (XpressO))
   B. Custom Dashboards show as: (Custom Dashboard)
6. View the Permitted Security Groups.
7. To add security groups, use the **Related Actions** icon for the domain security policy shown.
8. Select **Domain Security Policy** > **Edit Permissions**.

Worklet Security

You can add or configure worklets on "allowed" landing pages or dashboards, per the report's worklet options. The Available On field must specify the landing page.

Once on a given landing page or dashboard, users are able to add worklets they can access:

- **Delivered worklets**: Workday secures delivered worklets to domains. Users must have a security group with permissions to the domain securing the worklet. Use the View Security for Securable Item report to determine the security for a delivered worklet.
- **Custom worklets**: Since these worklets are custom reports, the owner of the report must grant access to or share the custom report with the user.

The custom report owner can share the report with users or security groups with access to the report's data source.

Activity 7.2 - Add a Worklet to a Delivered Dashboard

Business Case: Teresa needs to configure prompt defaults and share the report definition to add it to the Auditor dashboard. She will then test the prompt defaults using different dates.

Task #1: Configure Report

1. Sign in (or Start Proxy) as Teresa Serrano *(tserrano).*
2. Search for and edit the **WICT Expense Reports without Attachments** report.
3. Select the **Prompts** tab.
4. Select **Populate Undefined Prompt Defaults.**
5. Enter the following information:

Field	Prompt Qualifier	Default Type	Default Value
Expense Report Date	Starting Prompt	Specify default value	01/01/2023
Expense Report Date	Ending Prompt	Specify default value	12/31/2023

Reminder: Make sure Starting Prompt is before Ending Prompt.

6. Select the **Share** tab.
7. Select **Share with specific authorized groups and users**. If you share a custom report with a security group that has no security access to the dashboard, members of that security group can still run the report outside the dashboard. Similarly, security groups with access to the dashboard who do not have security access to the custom report can get to the dashboard but will not access the configured worklet on that dashboard.
8. Enter the following information:

Field Name	Entry Value
Authorized Groups	Controller Finance Auditor

9. From the **Columns tab**, on the Expense Report Payee row, in the Options column select **Do Not Show On Worklet**. To save space, you can use this option. The option will not show a column when running the report in the worklet. However, if the report runs outside of the worklet, all columns will show.
10. Select **OK** and **Run** the report using the default prompt values.
11. Access the **Maintain Dashboards** report. Ignore any errors that show.
12. Scroll down to the Auditor Workday-delivered dashboard, and select **Edit**.
13. Expand the **Worklets** section.
14. Select the **Add Row** icon to add a row to the top of the grid.
15. Select the **WICT Expense Reports without Attachments** worklet. The security groups configured on the report display by default in the Required for Groups field.
16. Select the **Required?** checkbox.
17. In the Worklet Size pull-down menu, select **2x**.
18. Select **Done**.

Task #2: Test Access

1. Start Proxy as Charles Bradley *(cbradley)*, a member of the Finance Auditor security group.
2. Select **OK**.
3. From the Home page, select the **Menu** button.
4. Scroll down to the Organization section, and select **Dashboards** > **Auditor** to display the Expense Report without Attachments worklet.
5. On the WICT Expense Reports without Attachments worklet, select **Configure** (gear icon) > **Edit Settings** to display default prompt values.
6. Change the prompts to *01/01/2022* and *12/31/2022*.
7. Select **OK** to save.
8. Select **Done**. Notice the data updates to reflect this date range.
9. At the bottom of the WICT Expense Reports without Attachments worklet, select **View**

More... to run the report outside of the worklet. Why do all columns display?

10. Select **OK**.
11. **Stop Proxy**.

Activity Complete

Activity Answers – Add a Worklet to a Delivered Dashboard

Task #2: Configure Report

8. Why do all columns display? *Because the report is not being executed as a worklet.*

Scenario

Logan McNeil wants to configure a menu and announcement related to report performance on the Report Administrator dashboard.

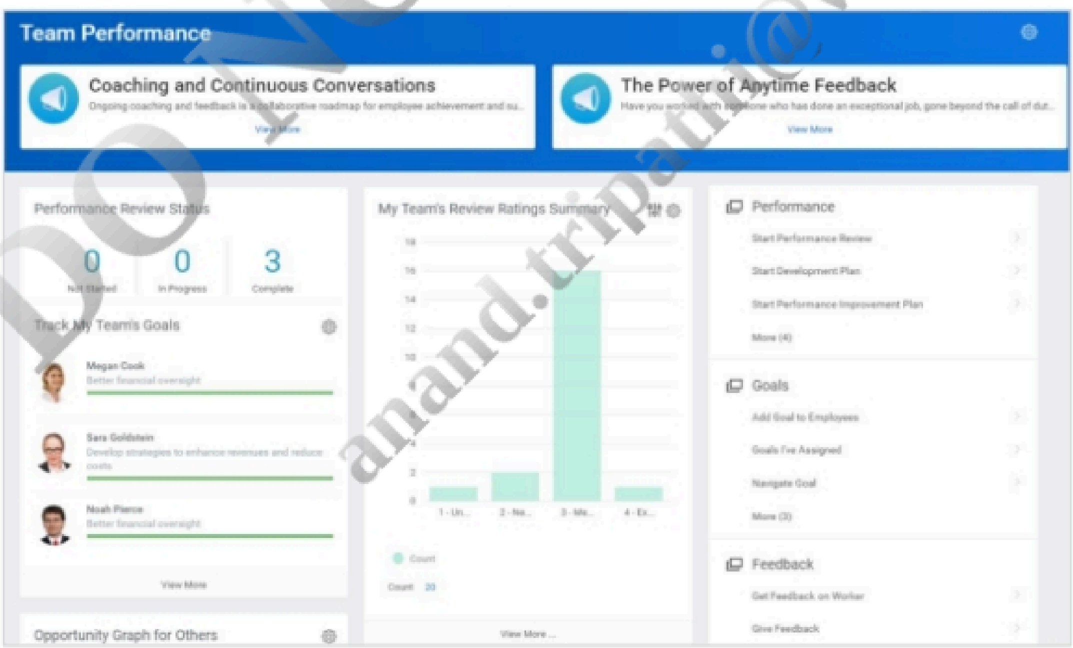
Requirements:

- Performance Tools menu with an external link to the Performance White Paper.
- Announcement regarding an effort to improve report performance.

Menus and Announcements

You can use Workday-delivered or custom dashboards for more than worklets and analytics. Configure menus and announcements using the Maintain Dashboards report to allow users to access not only reports, but also key tasks, links, and announcements.

Menus are available for dashboards (both delivered and custom), but not for landing pages such as Home or Workbench, and are configurable at the tab level. Workday allows announcements on dashboards and landing pages but are configurable at the dashboard level.



Menus

Menus allow you to configure tasks, links, and custom reports in a dashboard tab.

The Set Up: Tenant Setup - Worklets domain security policy secures the Create Custom Allowed Worklet task option. The same domain security policy also secures the Maintain Dashboards and Edit Dashboard tasks. A dashboard user will only access tasks, custom reports, and links for which they have security access. However, anyone with access to edit dashboards can:

- Add and rename tasks without affecting the same task on other dashboards.
- Search for any task, including removed tasks, by searching "customworktask:task name."

Example: The Academic, Invoice and Payments, Report Administrator, and Team Performance dashboards have tasks enabled that you can configure on menus.

Announcements

You can configure announcements for all dashboards and landing pages, including Home. They can include an action, report, or link that will display in the announcement box. Similar to allowed Menu tasks, Workday determines the allowed actions.

Some common configurations include:

- A rule to target a specific audience using the Create Announcement Rule task.
- An image or video to display with the message.
- An expiration date for the announcement.

Option	Description
Rule	Select a condition rule that identifies the message recipients. If you leave this field blank, all users access this message. Use tasks: • Create Announcement Rule • Edit Announcement Rule • View Announcement Rule

Expiration Date	Set a date where users no longer have access the announcement on the dashboard or landing page.
Message From / Message Title	Specify who the message is from or enter a message title.

Show Current Photo / Upload Custom Image	• Include the message sender's photo (from their worker profile) or a custom image, such as a logo, in the announcement.
	• Custom images must conform to the file size limit and permitted file types for your tenant.
	    • To select an existing image or create an image, select Upload Custom Image.
	    • If you select None of the above, or for messages with titles only, Workday displays a stock image.

Message	Type the message body of the announcement here.
Video	Specify a title and description, then select an image preview and enter the URL for the video (hosted outside of Workday). Videos open in separate browser tabs.
Action/Custom Report/External Link	Select an option for including direct links in the announcement to: • Tasks enabled for each specific dashboard or landing page • External links • Custom reports

Activity 7.3 - Configure Menus and Announcements

Business Case: Logan wants to add a menu section within the Report Administrator Dashboard containing performance-related items. She will create a Quicklink to display within the menu as well as an announcement for the reporting team.

Task #1: Create Quicklink

1. Sign in as Logan McNeil (*lmcneil*).
2. Access the **Maintain Quicklinks** task.
3. Select the **Add Row** icon and enter the following:

Field Name	Entry Value
Name	Performance White Paper
URL	https://workday.my.site.com/customercenter/article?no=000018587
Description	Resource on optimizing report performance.

4. Select **OK**.

Task #2: Configure Menu

1. Run the **Maintain Dashboards** report.
2. Filter for the **Report Administrator** dashboard, and select **Edit**.
3. Expand the **Menu** section. There are several tasks and reports already configured on this dashboard and its menu.
4. Select the **Add Row** icon to add a section, and in the Section Label field, enter *Performance Tools*.
5. In the Performance Tools row to the right of the Performance Tools section label, select the **Add Row** icon to add a new item.
6. In the External Link field, select the **Performance White Paper** link.

Task #3: Add Task to Dashboard

1. In the Tasks row to the right of the Tasks section label, select the **Add Row** icon to add a task. Review the tasks available and note Mass Update Scheduled Future Processes is not available.
2. In the Task field, select **Create Custom Allowed Worklet Task**.
3. In the Select Task field, select the **Mass Update Scheduled Future Processes** task.
4. Select **OK**.

Task #4: Add an Announcement

1. At the top of the page, select the **Announcements** tab.
2. Select **Edit**.
3. Select the **Add Row** icon to add an announcement.

> **Note**: Ignore the error that appears. In the training tenant you cannot upload videos.

4. Enter the following information:

Field	Value
Message Title	Team Project
Message	If you own a report identified in the Slowest Reports Run In Background worklet, please access the Performance Whitepaper in the Performance Tools menu to help develop an action plan.

5. Select **OK** and **Done**.
6. Select **Done** again to save the dashboard definition.

Task #5: View the Dashboard

1. Navigate to the Home Page.
2. Select the **Menu** button, scroll down to the Organization section and select **Dashboards** > **Report Administrator**.
3. Confirm the following:
   A. The Team Project announcement displays at the top of the dashboard.
   B. The Menu panel on the right side of the dashboard has the Performance Tools section.
   C. The Performance Tools menu section has the Performance White Paper quicklink.
   D. The Task section in the Menu panel has the Mass Update Scheduled Future Processes task.

Activity Complete

Limits and Performance

Limits

The system limits how many worklets landing pages and dashboards display. An alert will display to users attempting to configure additional worklets, and the worklets exceeding the limit will not display in the output.

Example limits include:

- Home: The first 20 configured worklets display, starting with required worklets.
- Workbench: The first 12 configured worklets will display, starting with required worklets.
- Dashboards: You can configure six dashboard tabs, each with a maximum of six worklets. The first six worklets display, starting with required worklets.

Performance

Use the most efficient data source for the worklet's intended users. For example, for worklets designed for the Manager role, you might use a data source like My Direct and Indirect Workers. This data source returns only the relevant workers, rather than initially getting data for all workers (like the All Workers data sources) then filtering out the results. Using a data source specifically built for the audience can improve performance, particularly when using a mobile device.

Where possible, design the worklet using an indexed data source and use indexed fields. For example, use an indexed data source (i.e., Workers for HCM Reporting or Trended Workers) rather than a nonindexed data source (i.e., All Workers or All Active and Terminated Workers). Notice performance improvements using indexed data sources whenever the set of data returned is anything other than the full set of instances or rows.

Use the Optimized for Performance checkbox when creating a report using an indexed data source in order to only select indexed fields in your report definition.

There are several indexed data sources in your tenant that you can extend to include additional nonindexed or even calculated fields. These newly added fields will then become indexed as well. The ability to extend indexed data sources and add new fields you can index provides you with some key benefits:

- Add nonindexed fields to a report without negatively impacting performance.
- Create calculated fields for a report without negatively impacting performance.
- No need to rebuild your reports; After extending a data source, easily edit any reports using that data source to add the newly indexed fields.

To extend a data source, use the Maintain Custom Data Source task:

1. Select **Create Data Source Extension** to select a data source to add additional fields to.

Resource: Please check Community for more information on which data sources are currently available for extension.

2. After adding your fields, return to the Maintain Custom Data Source report and select **Submit for Approval**. Doing so initiates the Custom Data Source Extension Approval Event business process, which you can configure to include any necessary reviews and approvals to suit your business needs.

Not all fields are suitable for indexing. To check if a nonindexed field is suitable for including in an extended data source, use the Field Suitability for Business Objects report. This report will display all of the fields on a specified business object, indicating if the field is suitable for indexing or not. If not, the report also displays alternate fields that return the same or similar data suitable for indexing. Use the report as a reference before adding fields to an extended data source.

Share worklets using the simplest security groups possible. For example, domains that typically have more restricted audiences like Managers and Talent Partners only secure the My Direct and Indirect Workers data source. However, a data source like All Workers can potentially return all rows. Doing so suggests that this data source is associated with domains that have more security groups, possibly requiring more complex and time-consuming security evaluations.

Where possible, employ user-based security groups rather than job-based security groups. For example, put the CEO, CFO, and any other job-based security groups that have access to All Organizations, into user-based groups. Doing so optimizes worklet performance for these individuals. For example, replace the CEO job-based group with a CEO user-based group, and assign the CEO to the CEO user-based group, and so on. This approach reduces the complexity of the security evaluation required, improving the performance of the worklet.

Inform users to expect shorter worklet response times after their initial sign-in to Workday is complete. Workday executes worklets once per user session (unless you manually refresh). So, when you initially sign in to Workday, any worklets associated your landing pages or dashboards retrieve data as required to render the worklet. However, once you have accessed worklet once, it renders more quickly on subsequent requests since it is now in memory (cached). The alternative (if worklet will take more than 30 seconds) is to create a report that 'lists' the report for execution. So, when the user executes the report, it will run outside of the worklet. Data sources that include the Report Task field (which displays the executable report link) are:

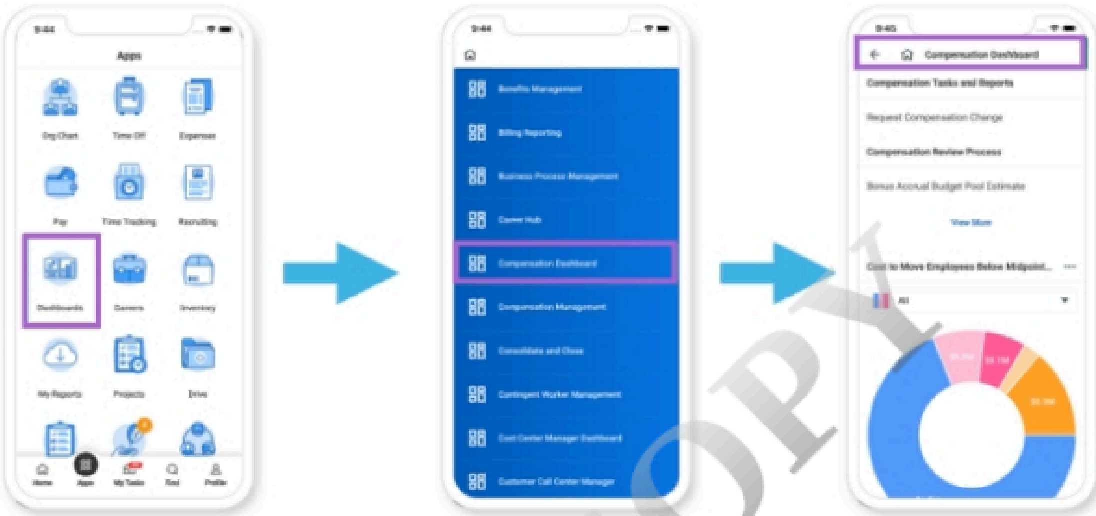
- Custom Reports I Can Run
- All Custom Reports
- My Custom Reports
- All Standard Reports
- Standard and Custom Reports I Can Run
- All Workday-Delivered and Custom Reports

Use a Menu to create a list of reports if there are too many or if they take more than thirty seconds to run.

Resource: For more information on report performance, refer to the Performance Reporting: 13 Golden Rules for Effective Troubleshooting & Optimization article in Workday Community.

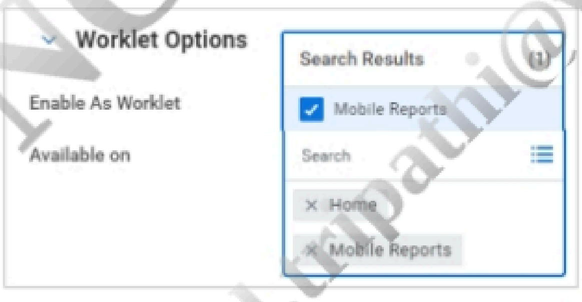
Mobile Reports

You can access Workday reports on mobile devices such as iPads or Android phones. Allowing you to key data on the go, when you need it, and where you need it. Workday-delivered and custom dashboards will show automatically on mobile devices if you have secured access to those dashboards.



You can also configure individual reports to show outside of dashboards, under the Mobile Reports landing page. Configure Workday custom reports to display under Mobile Reports from a mobile device by following these steps:

1. Enable the report as a worklet from the Output tab of the report definition.
2. Make the report "available" on Mobile Reports.
3. Configure the Mobile Reports landing page.



Similar to other landing pages and dashboards, you can configure worklets for mobile at the tenant level, as required or recommended, using the Maintain Dashboards report. You can also manually configure which optional worklets you want on Mobile Reports. Doing so assumes that you can access the Mobile Reports landing page and the given Custom Report/Worklet. Run the Configure My Worklet Landing Pages task (select Mobile Reports), or the Mobile Report Configuration task. From there, you can add/remove/reorder reports for mobile if the report is:

- Enabled as a worklet.
- Available on the Mobile Reports landing page.
- Available to the user.

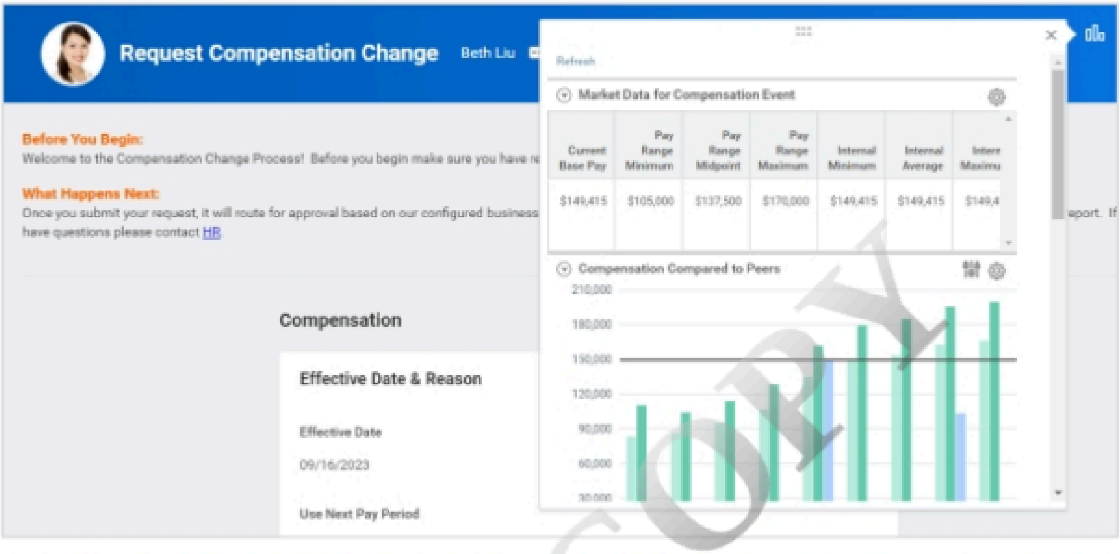
Mobile Report Considerations

Keep the following pointers in mind when using mobile reports:

- Workday restricts Mobile worklets on dashboards to display a maximum of 100 rows. When configured, the View More button enables you to access the full report without restrictions.
- Your data securely resides in the cloud. We avoid all local data storage except for the three instances listed below:
  - PDF viewing features (e.g., pay slips, talent card) require caching the PDF in view and deleting the PDF once you close it. PDFs are encrypted with the data protection API on iOS and by the OS on Android.
  - If you configure your Workday tenant to use mobile PIN sign-in and you opt for the feature, a stored, random, temporary application token facilitates authentication via PIN.
  - If you enable document sharing in iOS, you can share attachments from the Workday application with other applications on the device.
- You can disable any activity relating to downloadable business data (e.g., emailing annotated reports, viewing pay slip PDFs, sharing documents) at the tenant level.

Embedded Analytics

Embedded analytic functionality enables you to insert worklet reports into specific business process steps such as an initiation step, approval step, or an action step like review. Embedding worklets into business processes allows you to view relevant contextual information as you are performing actions within the process. Thus, you can make more informed decisions and encounter fewer processing mistakes.



Within the given business process step, you can access embedded analytics for that task (in the upper right corner under View Related Information.) You can configure the window of embedded worklets to open or closed by default. You can also configure each report to collapse or expand by default.

Steps

To embed a custom worklet into a business process, you must first configure the worklet and then add it to the business process step:

- Enable the custom report as a Worklet and select Embedded on Tasks in the Available on field.
- Ensure that you share the report with security groups that need access and have the necessary prompts to use in business processes.
- Add the worklet to the business process step (Business Process > Maintain Related Worklets).
- Configure the worklet display and prompts on the business process step.

Configuration considerations:

- You can configure up to five worklets per business process step.
- To include worklets on an initiation step, you must configure the worklet on the default definition of the business process (rather than a copy of the default definition).
- When configuring the worklet on the step, you can map worklet prompts to the context of

the event and also control display options (e.g., expanded, collapsed).

Allowed Business Processes

The Business Process Steps Enabled for Worklets report lets you view all of the business processes and related steps enabled for Embedded Analytics.

Only the Default Definition of a business process can have an embedded worklet on the Initiation step. Copied business process definitions inherit the Initiation step worklets from the default definition.

Workday delivers several preconfigured worklets for business process steps in areas such as compensation, staffing, and talent. You can also build Custom Worklet reports to use as embedded analytics on business process steps.

Custom Dashboards

Beyond the Workday-delivered dashboards, you can also configure an unlimited number of custom dashboards. The Maintain Dashboards report provides a centralized administration view with options to:

- View, create, edit, and delete dashboard settings.
- Configure tab, content, menus, and announcements on the dashboards.

This task allows you to:

- View all Workday-delivered and custom dashboards in the tenant.
- View the dashboard settings.
- Configure dashboard tabs, prompts, optional worklets, and required worklets for each dashboard on the tenant level.
- Delete a custom dashboard (only active if the dashboard has no worklets).
- Create a new custom dashboard via the Create Custom Dashboard button.

Additional tasks (the system secures these tasks to the Setup: Tenant Setup - Worklets domain):

- Enable Worklet for Dashboards: Add delivered worklets to a custom dashboard.
- Remove Worklet from Dashboards: Remove worklets from dashboards.

You can configure and add worklets to each custom dashboard just as you would with preconfigured dashboards. You also have the ability to configure dashboard-specific menus and announcements.

Create a Custom Dashboard

When creating a custom dashboard, you must specify the following:

Field	Description
Domain	Secure custom dashboards to a delivered or custom domain. Users with security groups permitted for the domain can access the custom dashboard. If a delivered domain does not meet the needed permissions, you can choose from up to 50 custom domains.
Dashboard Icon	Indicate which icon to display when you add the custom dashboard as a worklet on the Home page.
Dashboard Tabs	Shows whether or not dashboard tabs are enabled for this dashboard.
Maximum Worklets Allowed	Indicate the maximum number of worklets allowed on the dashboard. You can create up to 6 tabs in a dashboard, with up to 6 worklets per tab.

After defining the dashboard settings, configure the dashboard tabs and content for the custom dashboard. Determine how many tabs you need, which worklets should be on the dashboard tabs, and which security groups should have access to each worklet.

Dashboard Tabs

Every dashboard can have up to six tabs, each of which may have six worklets on it. You can configure the worklets from the Maintain Dashboards task. To view the configuration of a tab, select it. You can change the order in which the tabs appear on the dashboard by dragging the name of the tab up and down. To add a tab, select the **Add** button.

Configure the following when adding a dashboard tab:

Field	Description
Tab Name	The name of the tab as it will appear on the dashboard.

Configurable By User	Selecting this checkbox indicates whether a user can add or remove worklets from the custom dashboard. Remember that custom dashboards using prompt sets are not user-configurable.
Prompt Set (Optional)	To enable prompt sets for a dashboard tab, you must clear the Configurable By User checkbox. Then, the user may select or create a dashboard prompt set from this field.

Scenario

Teresa Serrano needs to create a custom dashboard for C-level executives that shows expenses and headcount by cost center.

Cost Center dashboard requirements:

- Available to C-level executives.
- Two tabs:

Tab	Worklets, Prompts, and Defaults
Headcount	Worklet: Headcount by Cost Center
Financials	• Worklets: Expenses by Cost Center and Airfare by Cost Center • Prompts: Company, Start Date, and End Date • Default Data: GMS USA and data for 2022

Activity 7.4 - Deploy a Worklet on a Custom Dashboard

Business Case: Teresa Serrano needs to create a custom dashboard for C-level executives that shows headcount by cost center.

Task #1: Create Custom Dashboard

1. Sign in (or Start Proxy) as Teresa Serrano *(tserrano)*.
2. Access the **Maintain Dashboards** report. Ignore any errors that show.
3. On the bottom left of the page, select the **Create Custom Dashboard** button.
4. In the Dashboard field, enter *WICT Cost Center Dashboard*.
5. Select **OK**.
6. Enter the following information:

Field Name	Entry Value
Domains	Custom Domain 30 *(Note: We preconfigured Custom Domain 30 with permissions for the needed C-Level security groups for the purpose of training requirements.)*
Dashboard Icon	Cost Center
Max Worklets Allowed	6

7. Select **OK** to save the dashboard.

Task #2: Copy Report as Worklet

1. From the search bar, run the **Copy Custom Report** task.
2. Select **Sub Report - Headcount by Cost Center**.
3. Select **OK**.
4. In the Name field, enter *WICT Headcount by Cost Center*.
5. Select **OK**.

6. Select the **Output** tab.
7. Expand the **Worklet Options** section.
8. Enter the following information:

Field Name	Default Type
Enable as Worklet	(select) (*default*)
Available on	WICT Cost Center Dashboard (*Note: Add this dashboard and do not remove others)*
Max Number of Rows	10
Maximize Report Options	Display this Worklet when Maximized (*default)*
Refresh Data	Every sign in
Worklet Icon	Headcount **Note**: If the type-to-search returns No Matches Found please scroll to select.

9. Select the **Share** tab.
10. Select **Share with specific authorized groups and users**.
11. Add the following authorized groups: **Chief Executive Officer**, **Chief Financial Officer**, and **Chief Human Resources Officer**.
12. Select **OK** to save the report definition.

Task #3: Configure Dashboard Content

1. Run the **Maintain Dashboards** report.
2. Filter for the **WICT Cost Center Dashboard** and select **Edit**.
3. Select **Add** to add a dashboard tab.
4. In the Tab Name field, enter *Headcount*.
5. Expand the **Worklets** section.
6. Select the **Add Row** icon to add a row. In the Menu Item column, select the prompt > **All**.

Notice how the only worklet available to add is the one you configured for the custom dashboard. You can configure worklets at the tenant level if you share the worklet.

7. Add the **WICT Headcount by Cost Center** report as a worklet. The Required for Groups field auto populates with the groups with whom you shared that report.

8. For the Worklet Size pull-down menu, select **2x**.

9. Select **Done**.

Task #4: Test the Dashboard

1. **Start Proxy** as Steve Morgan *(smorgan)*. He can access the dashboard with the worklet as a member of the Chief Executive Officer security group.

2. From the **Menu**, scroll down to the Organization section, and open **Dashboards.** Select the **WICT Cost Center Dashboard**.

   A. Notice that Steve Morgan can access and view the dashboard. Steve can interact with the report or select **View More...** to run the report outside of the worklet.

   B. Can the CIO, Oliver Reynolds, access the new dashboard?

   C. Will the report run on the dashboard when Oliver opens it?

3. **Stop Proxy**.

Activity Complete

Activity Answers – Deploy a Worklet on a Custom Dashboard

Task #4: Test the Dashboard

2B. Can the CIO, Oliver Reynolds, access the new dashboard? *Yes, Oliver has security access to the dashboard because he belongs to a security group with access to Custom Domain 30.*

2C. Will the report run on the dashboard when Oliver opens it? *No, the owner has not shared the report with the Chief Information Officer, so Oliver cannot run it.*

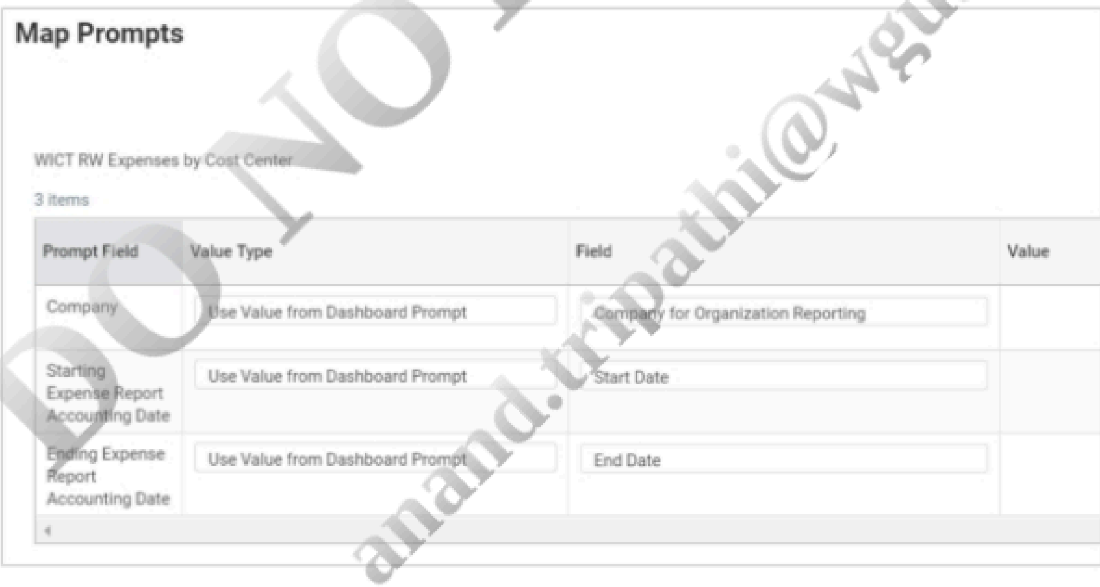
Dashboard Prompt Sets

Prompt Sets

You can configure dashboard prompt sets at the tab level and provide an enhanced user experience that allows for flexibility with report deployment. Prompt field values set at the dashboard tab level apply to the worklets configured for that tab. Doing so, allows the user to view data across all of the worklets on that tab with one prompt set.

When configuring content for a custom dashboard tab with prompt sets, you can only configure required (not optional) worklets. Dashboard users are not able to add or remove worklets from a dashboard that uses a prompt set. Additionally, the dashboard creator or a user with the appropriate security must Map Prompts to specify from where the worklet prompts should get their values. The options for mapping prompts are as follows:

- Use value from dashboard prompt.
- Use default value from worklet.
- Specify default value.
- Determine default value at runtime.


Map Prompts

WICT RW Expenses by Cost Center

3 items

Prompt Field	Value Type	Field	Value
Company	Use Value from Dashboard Prompt	Company for Organization Reporting	
Starting Expense Report Accounting Date	Use Value from Dashboard Prompt	Start Date	
Ending Expense Report Accounting Date	Use Value from Dashboard Prompt	End Date	

Activity 7.5 - Deploy Dashboard Tabs with Worklets

Business Case: Teresa Serrano needs to add a tab to the existing cost center dashboard that shows expenses by cost center with prompts for company and date range.

Task #1: Copy Reports as Worklets

1. Sign in (or Start Proxy) as Teresa Serrano *(tserrano)*.
2. From the Search box, run the **Copy Custom Report** task.
3. Select **WDINST Expenses by Cost Center**.
4. Select **OK**.
5. In the Name field, enter *WICT Expenses by Cost Center*.
6. Select **OK**.
7. Select the **Output** tab.
8. Expand the **Worklet Options** section.
9. Enter the following information:

Field Name	Option
Enable As Worklet	(select)
Available on	WICT Cost Center Dashboard Home
Max Number of Rows	10
Maximize Report Options	Display this Worklet when Maximized
Refresh Data	Every sign in
Worklet Icon	Bar Graph **Note**: If the type-to-search returns No Matches Found please scroll to select.

10. Select the **Share** tab.
11. Select **Share with specific authorized groups and users.**
12. Add the following authorized groups: **Chief Executive Officer**, **Chief Financial Officer**, and **Chief Human Resources Officer**.
13. Select **OK** to save the report.
14. Run the **Copy Custom Report** task again.
15. Select **WDINST Airfare Analysis by Cost Center**.
16. Select **OK**.
17. In the Name field, enter *WICT Airfare Analysis by Cost Center.*
18. Select **OK**.
19. Review the report definition. Notice how the report groups airfare expense report lines by cost center and sums the amounts.
20. Select the **Output** tab.
21. Expand the **Worklet Options** section.
22. Configure the options as follows:

Field Name	Option
Enable As Worklet	(select)
Available on	WICT Cost Center Dashboard Home
Max Number of Rows	10
Maximize Report Options Refresh Data	Display this Worklet when Maximized Every sign in
Worklet Icon	Bar Graph

23. From the **Share** tab, select **Share with specific authorized groups and users**, and include the following authorized groups: **Chief Executive Officer, Chief Financial Officer, and Chief Human Resources Officer**.

24. Select **OK** to save the report.

Task #2: Add a Dashboard Tab with Prompt Set

1. Run the **Maintain Dashboards** report.
2. Locate the **WICT Cost Center Dashboard**.
3. Select **Edit**.
4. Select **Add** to add another dashboard tab.
5. In the Tab Name field, enter *Financials*.
6. Clear the **Configurable By User** checkbox, enabling the dashboard prompt set.
7. In the Prompt Set (All) field, select **Create Prompt Set**.
8. Enter the following information:

Field Name	Entry Value
Name	WICT Company and Date Range Prompt Set
Description	This prompt set captures a company for organization reporting, a start date, and an end date.
Category	Company

9. In the Prompt Fields grid, **add** three rows.
10. In the first row search for *company for*. Then, scroll down and select **Company for Organization Reporting (Financial Reporting)**.
11. In the next two rows enter the following prompt fields: **Start Date** and **End Date**. (You will notice several start and end dates displayed here. Choose the first one.)
12. Select **OK** to save the prompt set.

Task #3: Configure the Prompt Set

1. Expand the **Prompts** section.
2. Enter the following information:

Prompt Field	Default Type	Default Value	Required
Company for Organization Reporting	Specify Default Value	Global Modern Services, Inc. USA	(select)
Start Date	Specify Default Value	01/01/2023	(select)
End Date	Specify Default Value	12/31/2023	(select)

Task #4: Add the Worklets to the Dashboard

1. Expand the **Worklets** section.
2. Select the **Add Row** icon twice to add two rows. In the first row of the Worklet column, select the **Menu Item field** > **All**. Notice how the worklets available now include the two you just configured.
3. Add both the **WICT Expenses by Cost Center** and **WICT Airfare Analysis by Cost Center** reports as worklets. Notice that the Required for Groups field again populates with the groups with whom you shared the reports.
4. Verify that the Worklet Size for both worklets is **1x**.
5. Select **Map Prompts** for the WICT Expenses by Cost Center worklet.
6. Enter the following information:

Prompt Field	Value Type	Field
Company	Use Value from Dashboard Prompt	Company for Organization Reporting
Starting Expense Report Accounting Date	Use Value from Dashboard Prompt	Start Date

Ending Expense Report Accounting Date	Use Value from Dashboard Prompt	End Date *Note: Be sure to change to End Date.*

7. Select **Done**.
8. Map the prompts in the same manner for the second worklet - WICT Airfare Analysis by Cost Center.
9. Select **Done**.
10. From the Maintain Dashboards report, edit the WICT Cost Center Dashboard again.
11. You can change the order that the dashboard tabs appear. Hover-over the Financials tab. A reorder icon (up and down arrows) appears. Select and drag the Financials tab to be below the Headcount tab.
12. Select **Done**.

Task #5: Test the Dashboard

1. **Start Proxy** as Steve Morgan *(smorgan)* - a member of the Chief Executive Officer security group. He can access the dashboard and the worklets.
2. Access the **WICT Cost Center Dashboard**.
3. Go to the **Financials** tab and notice the prompt set at the top of the dashboard tab. Notice the system displays the data for the selected start and end dates. For example, take note the total amount in the WICT Expenses by Cost Center report.
4. Select the **pencil** icon to edit the dashboard prompt settings.
5. Enter the following information:

Field	Value
Company for Organization Reporting	Global Modern Services, Inc. (USA)
Start Date End Date	01/01/2022 12/31/2022

6. Select **OK** to view the updated worklet results. Now, notice the updated total amount in the WICT Expenses by Cost Center report. The system displays the values for the updated start and end dates.

7. **Stop Proxy**.

Activity Complete

Chapter Summary

- You can enable a custom report as a worklet and add it to a delivered or custom dashboard.
- When configuring worklets, consider that worklets have space and performance limitations.
- Consider the security of the report and the dashboard when determining which groups should have access to the worklet.
- Use report output throughout Workday by embedding reports in business processes.
- Enable reports as worklets for mobile devices to access analytics anywhere.

Chapter 7 Knowledge Check

1. Which items should you consider when enabling a custom report as a worklet? (Select three correct answers.)
    a. Chart Type
    b. Number of Rows
    c. Performance
    d. Prompt Defaults
    e. Report Name
2. What is a requirement to push a worklet out using Maintain Dashboards?
    a. Prompt Defaults must be configured in the report.
    b. The report must use an indexed data source.
    c. The report must be shared.
    d. The Report Type must be an Advanced report.
3. When are all worklets on a dashboard tab required?
    a. For Workday Delivered dashboards
    b. The worklet takes longer than 30 seconds to run.
    c. The report output contains over 100 rows.
    d. The tab on the dashboard uses a prompt set.