Reports: Reporting in Workday

All Staff

There are several types of reports you can generate within Workday. Managers can access self-service reports such as *My Payslips*, as well as reports involving their teams, such as *Outstanding Actions for My Direct Reports*. Available reports can be accessed 1) by searching for the report name, 2) from within an application (Worklet), or 3) from within a business process.

ACCESS REPORTS WITHIN APPLICATIONS (WORKLETS)

In each application (Worklet), available reports are listed under the **View** column, and are labeled with names that describe the information they display.

From your **Home** page:

- **1.** Navigate to the application (worklet) you want to view.
- 2. Click an item in the View column to access a report on various topics.





ACCESS REPORTS WITHIN BUSINESS PROCESSES

Business processes that have embedded reports will display a **View Related Information** icon in the top right corner of the business process screen.



To access an embedded report, click the **View Related Information** icon. The report displays information specific to the step in the business process.

Create Job Requisition		
-	Recruiting Information	
Start	Recruiting Details	
Recruiting Information	Reason *	1
Qualifications	Replacement For Mason Jar	
Organizations	Recruiting Instruction *	
Back	ext	

For example, within the *Create Job Requisition* business process, the report may display *Job Openings in Organizations I Manage*, or *Average Salary for This Job*.

		Refresh	
			-
	Recruiting Information	Organization	Count
art	Recruiting Details	Recruiting Details Counseling and Psychological Services (Barbara Thomas)	
ecruiting Information	Reason *	Total	1
de		Our Average Salary for This Job	100
ualifications	Replacement For Mason Jar		. 1
ganizations	Recruiting Instruction *	USF Hiltop Cam	
tachments	Internally and Externally		
ssign Roles	Recruiting Start Date *		

VIEWING REPORTS

Several icons display over the top-right corner of a report. The *Export* to *Excel* icon i allows you to export the report into Excel; similarly, the *Export to Worksheets* icon i lets you send the report to a Workday worksheet. The *Filter* icon i allows you to filter the data from each column in the same way as in Excel.

Use the *Expand/Collapse Chart* **□**, *Grid View* ≡, and *Toggle Full Screen* **□** icons to manage report viewing properties.

You can also click on the *Print* icon report as a printable PDF. Note that the above options are contingent on your organization's Security Permissions configurations.

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FILTERING REPORT CONTENT

Report content can be filtered by setting criteria on individual columns. To filter a report:

1. Click on the column heading of the data you want to filter. Column filter options display.

- 2. To sort the data, click on the appropriate **Sort Ascending** or **Sort Descending** arrow.
- **3.** Alternatively, choose a filter condition from the options available in the **Filter Condition** field, and enter values as required by the filter condition.
- 4. Click **Filter** to complete the operation.





SOME COMMON REPORTS

Below are some common reports with instructions on how to access them.

1. Payslips

Click Pay Worklet > View > Payslips

2. My Absence Balances

Click Absence Worklet > View > Absence Balance

3. Search for Workers (Employees)

Click Directory Worklet > View > Find Workers

- My Benefits/Copy, or My Dependent's Info Click My Benefits Worklet
- 5. My Team's Schedule

Click Team Time Worklet > View > My Team's Schedule

6. My Open Job Requisitions

Click Recruiting Worklet > View > My Open Job Requisitions

7. Workers with Hours to Approve, or Workers with Unsubmitted Hours:

Click Team Time Worklet > Actions > Review Time

8. Outstanding Actions for My Direct Reports

Type report name in Search Box

9. My Direct Reports Staffing History

Type report name in Search Box

10. My Job Applications

Click Career Worklet > View > My Job Applications

