

Workday has several reports that allow you to view and audit data in the system. Reports are available through worklets and dashboards. Dashboards are a collection of reports that are in one place. Workday secures every report and every data source used in a report. Report data is real-time. This means that data can change as events are completed in the system. An employee’s role in Workday determines the reports and data the employee can run and access.

TIMEKEEPER REPORTS AND PURPOSE

Step	Task/Report Name	Description
Review the schedule assignments for each of your workers	"View Schedule for Worker"	Use to view an individual worker's scheduled times for each day within a month period.
	"Audit TT Tenant - Worker Schedule Assignments"	Returns your time tracking workers, job information, and their current schedule assignment.
Assign workers to the correct schedule where necessary.	"Assign Work Schedule"	Select the worker you are making the assignment for and then choose a start date for the assignment. The default can be 01/01/2020 or the actual date the worker begins that schedule.
Create new schedules if they do not already exist in the tenant	"Create Work Schedule Calendar"	Create a New Work Schedule to be assigned to workers. Use a standard naming convention for your department and add a pattern week with scheduled in and out times for the proper days
Review All Work Schedules	"Audit TT Tenant - All Work Schedule Calendars"	Ensure all work schedules needed for worker assignments have been created and are options for Managers



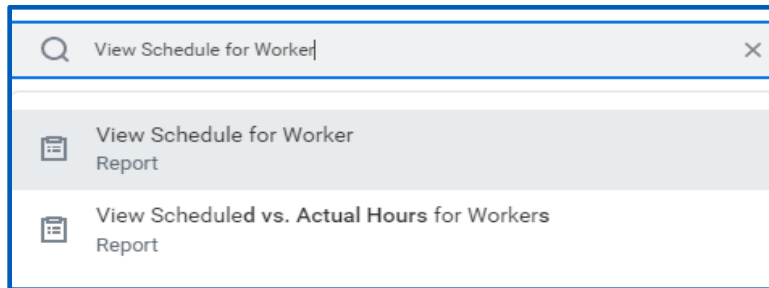
HOW TO RUN REPORTS IN WORKDAY

This guide provides procedures and information on how to:

1. Navigate to Reports
2. Run Reports
3. Sort, Filter and Export
4. Use the: Drive

TO FIND A REPORT

1. Enter the report name in the **Search** field. All reports can be located by entering the full report name or portions of the report name in the **Search** field.
2. Click on the report link to access the report. Below is an illustration of searching for a report using the Search field.



BASIC STEPS TO RUN A REPORT

3. After finding a report, you may need to enter specific criteria to help generate the report data you need. The basic steps in running a report are listed below.
4. To run a report.

5. Click on the report link.
6. Enter or select the desired prompt values, if applicable. Please refer to the X crosswalk to determine which values should be entered to receive the desired results in the report.
7. Click OK to run the report.

REPORT FILTERS (PROMPT VALUES)

8. Some reports allow you to save the prompt values or report filters that you have entered. After you have entered the prompt values for a report, save them and use them again when running the report in the future. Save more than one report filter, if desired.
9. Search for the report and enter report prompt values.
10. Enter or select the desired prompt values, just as you would with any report that is enabled for prompts.
11. In the Untitled Filter box, enter a name for the saved filter.
12. Click the Save button to save the filter. The report filter is then saved for your Workday user account and is available any time you access the report.
13. Repeat these steps to create additional saved filters as required.

REPORT OPTIONS: SORTING, FILTERING, VIEWING CHARTS, EXPORTING AND PRINTING REPORTS

Report data can be viewed and managed in a variety of ways. Depending on the type of report, options could include sorting or filtering report data, viewing the data in a chart format (if available), exporting the report to Excel, and printing the report in PDF format. The report options display in the top-right section of a report.



← Audit TT Tenant - Worker Schedule Assignments Actions

Exclude Defaulted Work Schedules No

0 items

Payroll Agency	Worker	Employee ID	Job Profile	Worker's Manager	Work Schedule Calendars	Work Schedule ID
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Option Description




Click to export a report in Excel format.



Click to filter select columns (fields) in an online report. You can also click the column heading to filter that column.



Click to show a report in chart format. To hide the chart, click the  icon.



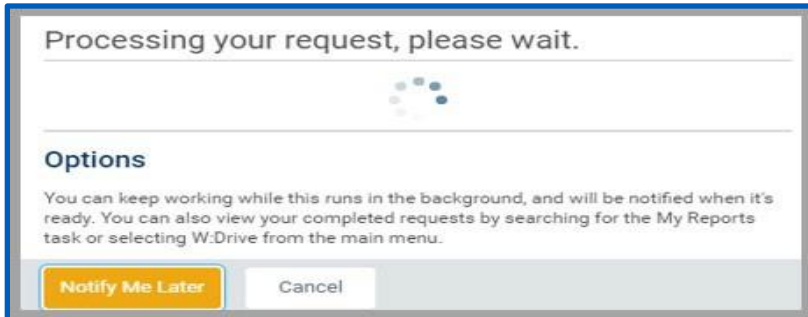
Click to generate a PDF copy of the report that can be saved and printed.



Note: Some reports do not require prompt values. These reports run automatically after clicking the report link.

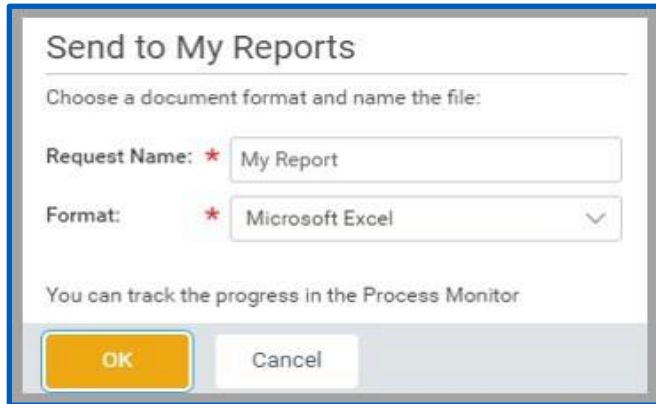
RUNNING A REPORT: NOTIFY ME LATER

There may be a delayed response when you run a report. Workday gives you the option to send the results to your Notifications. A pop-up window displays that gives you the option to continue working while Workday processes your request. Workday will send a notification to you when the report is ready to view.



14. If you want to be notified when the report becomes available:
15. Click the Notify Me Later button.
16. Name the report.

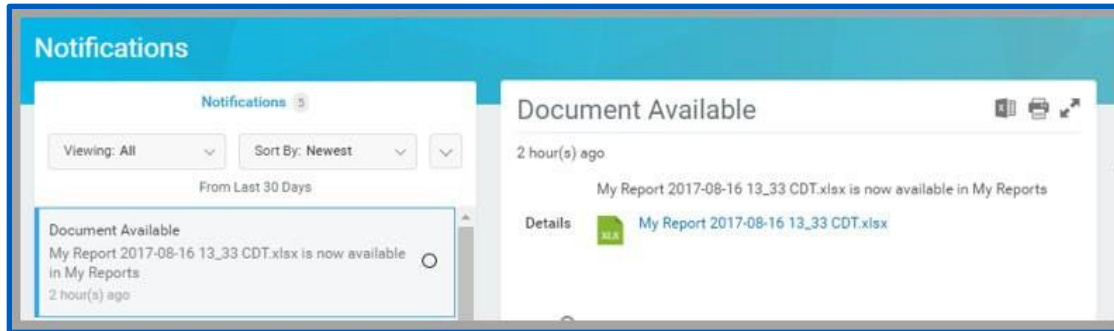
17. Select the file format you want such as Microsoft Excel or PDF and click OK.




18. When the report is ready, you will receive it in your Notifications box.

19. If you are still signed into Workday when the report has finished running, a notice displays in the top right corner of the page letting you know your report is available.

20. Click the notice or access the report in your Notifications box.

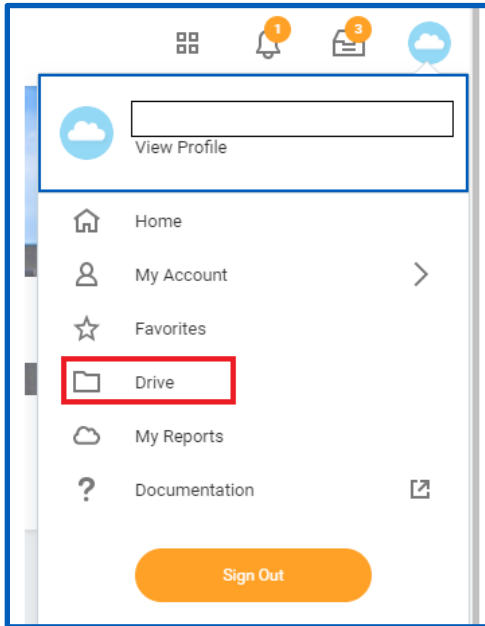


 **Note:** If you decide not to send the results to your Notifications, then Workday continues to process the request and the report displays when ready.

THE: DRIVE

The Workday drive (Drive) is a virtual drive where you can store generated reports. Reports are sent to the drive when reports are scheduled to run or if you decide to utilize the **Notify Later** feature when running a report. If a report is shared with you or other users (by an administrator), you and those users will receive report output in your respective Drives.

To access the Drive from the **My Account** menu:



STILL HAVE QUESTIONS ABOUT WORKDAY

For additional support and questions about Workday please contact your agency HR Practitioner or view the website at Workday.Baltimorecity.gov.