

Reporting

Overview

Running reports in Workday allows you to extract data from the system.

Who Does This: Managers (and some individual contributors based on job responsibilities)

Things to Know:

- Security is needed to run reports with secured fields
- Approvals are not necessary to run reports, however, requesting new custom reports may require approval from HR or other department leadership



Report Name

Step 1

Search the report name in the search bar.

Search Results

Categories

Common

Assets

Banking

Search Results 2 items

Tasks and Reports

Sample Custom Report

Step 2

Click the report name under **Tasks and Reports** to run the report.

Note: If you do not know a report name, there are many default reports which you can run. Choose a worklet and under **View**, chose a report.

Suggested worklets for manager include My Team, Team Performance, Compensation, and Hiring.



Step 3

Once the report has been run, you may export it to an excel file by clicking the **Export to**

Excel icon



FAQ's

What are some examples of reports I can run? Managers can view reports on his or her team under the **My Team** dashboard. Most individual contributors will not have access to reports unless gives special permissions based on his or her responsibilities.

What if a field is blank in the report? This is likely because you do not have the proper security settings to view the report. Please submit an IT ticket and include the name of the report and business reason to gain access to that field.

What if I cannot see a report I am trying to run when I search for it in the search box? This is likely because you do not have the proper security settings to view the report. Please submit an IT ticket and include the name of the report and business reason to gain access to the report.

Where do I find a copy of a report I ran? You can find all run reports in your “W: Drive”. Select the cloud/photo icon in the top right corner, then click on **W: Drive** to see all attachments from previous reports.

What if I am unable to open the attachment? Please submit a ticket with the IT department to troubleshoot.

What if I need a new report built? Please submit an IT ticket with your request including necessary data fields, formulas, business reason, and who the report should be shared with. You will receive a response within three business days and may be required to have additional approvals from department leadership.