UR Financials: Searching for Reports

Prepared for: Project Team

Prepared by: Darren Picciano

Friday, January 3, 2014
How to search for Reports in Workday

1. **Use the search box to search for key words related to reports:**
   - Examples of keywords are “View, Find, Journals, Ledger, Transaction, Summary, FAO, Statements”
   - Search for keywords that have meaning in Workday – if you searched on a keyword and no results are returned please contact the Reporting Team for clarification.

2. **Use the sitemap to find Workday Standard reports (see slide 3 & 4 for screenshots):**
   - Old UI – the sitemap is found via the Navigation pullout screen.
   - New UI – the sitemap is found via Menu button

3. **Use the following to find Custom Reports:**
   - Use the report called “View Custom Reports I can Run” --- or;
   - Add the “Custom Reports” worklet to your homepage --- or;
   - Add the “Reports” worklet to your homepage.

   - Note: Reports can be added to your “Favorites” worklet after running the report. To add to your favorites → Use the related action button to “Favorite → Add”. (See slide 5 for screenshots)
Finding Workday Standard Reports – Old UI

Use the right handed slideout “Navigation” then use the category “Sitemap Menu”
Finding Workday Standard Reports – New UI

Use the menu icon to find the Sitemap
Adding Reports to your “Favorite Worklet”

Use the related action button to add a Favorite.
End of document