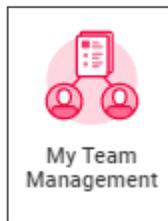


This job aid explains how to access, generate, and navigate reports. Relevant reports for Managers can be found in the My Team Management application. You can also search for a report by name by entering search terms in the Search field. The reports available to you in My Team Management and in other applications may vary depending on your role and security settings.

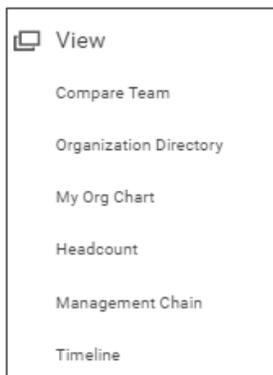
Access & Generate Reports

From your Workday home screen:

1. Navigate to the **My Team Management** application.



2. Under the **View** column, a list of available reports to you display. Click the report you want to view.



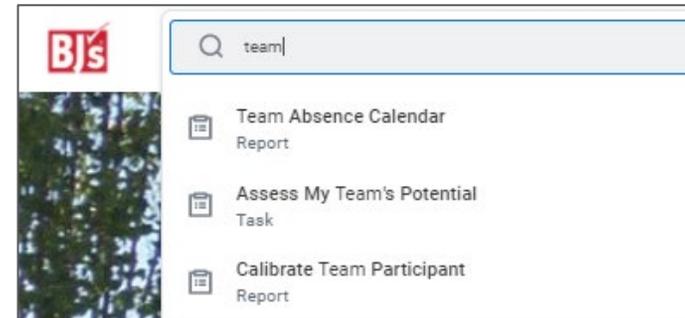
From the Workday Search bar:

1. Enter search terms in the search field. Workday returns tasks, reports and other items matching the terms you entered.



NOTE: Reports are indicated by the word "Report" after the title.

2. Select the title of the report you wish to open, then enter filter and preference values, if prompted.



Report Navigation

- For some reports, the data will display. Use the icons on the top right of the data grid to export, filter, and sort data, as applicable.

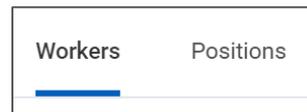
Icon	Description
	Export to Excel
	Filter Grid Data
	Expand/Collapse Chart
	Set Grid Preferences
	Full Screen Viewing Mode
	Configure and View Chart Data

- Blue text in a report field indicates a link that you can use to drill down for additional information. To access more information, click the blue text or hover over the text to reveal the Related Actions icon.

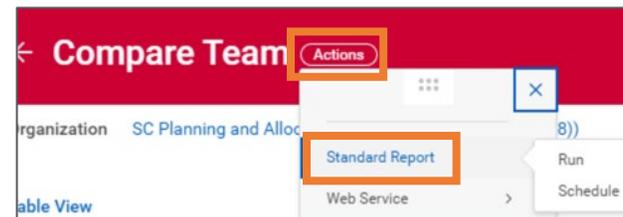
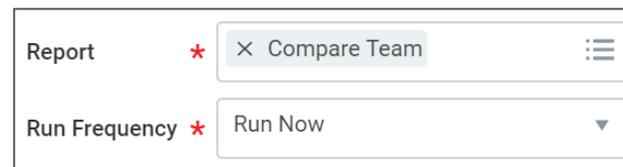


- Reports display fields to set prior to running. Click in the empty fields and select values as applicable. Once filters and preferences are set, click **OK** at the bottom of the screen.

- Reports provide tabs which display additional views. Below is an example of possible tabs which will differ based on the report.

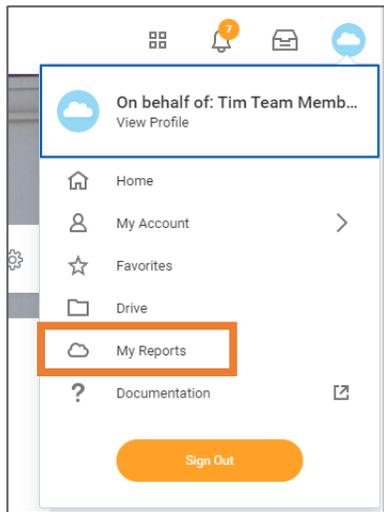



- Reports display the **Actions** icon to the right of the report title. Click **Actions** > **Standard Reports** > Select **Run** or **Schedule**.
 - If scheduling a report, click the Run Frequency field and select a value from the drop-down menu.

Report Navigation (continued)

6. To access a scheduled report, click the Workday Inbox icon.
7. Select My Reports.



NOTE: If a report requires a large amount of data to be loaded, then a pop-up displays a message that you can keep working while the report runs in the background and will be notified when the report is ready. Click **Notify Me Later** to continue working in Workday. When ready, a pop-up notification and a Workday notification appear.

Options

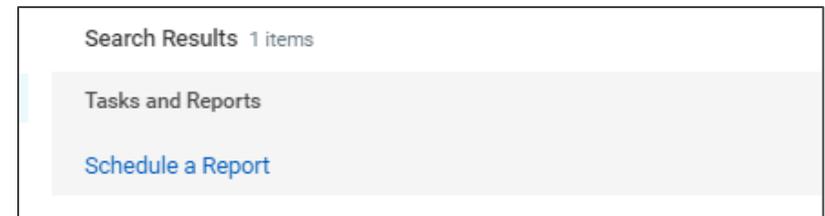
You can keep working while this runs in the background, and will be notified when it's ready. You can also view your completed requests by searching for the My Reports task or selecting My Reports from the main menu.

Notify Me Later

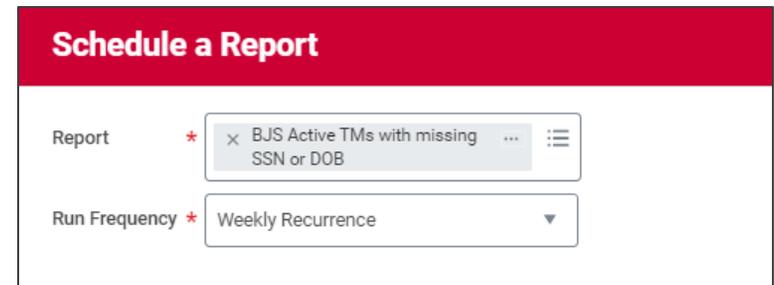
Cancel

Schedule a Report

1. In the search bar, type **Schedule a Report** and click enter.
2. In the search results, select **Schedule a Report**.



3. In the **Report** field, enter the name of the report you want to schedule.
4. In the **Run Frequency** field, select how often you want to run the report. Click **OK**.



NOTE: In the **Schedule** tab, there may be additional fields to complete including day, time, start date, end date, etc. Based on the run frequency selected.

5. In the **Output** tab, select the output type (Excel, PDF or CSV).
6. In the Report Tags field, add any desired tags.

Schedule a Report (continued)

7. The **File to be Deleted After (Days)** field defaults to 5. Do not change.
8. Once the required fields have been completed, click **OK**.
9. The scheduled report will be delivered to your Workday inbox as scheduled.



NOTE: All scheduled reports must have an end date so you will need to periodically renew the scheduled report.