



Workday: Workday Fundamentals



Workday Fundamentals

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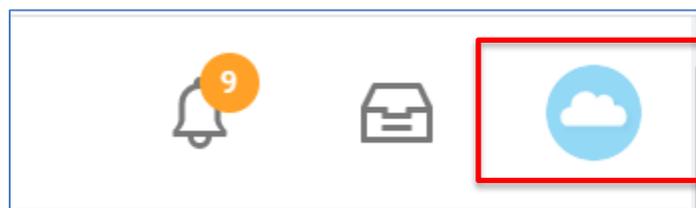
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Daily Digest Settings

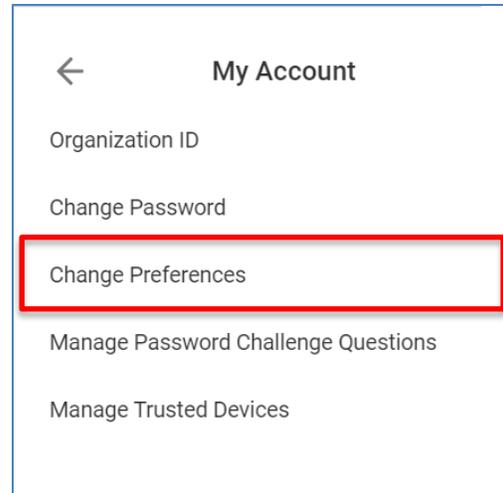
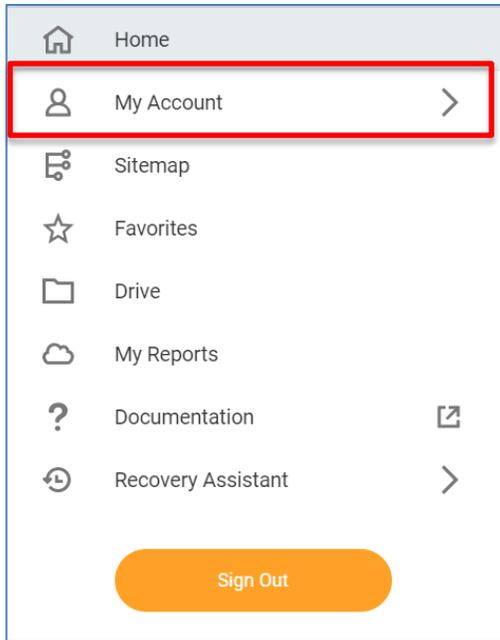
By default, you will receive an email notification for each Workday task and/or approval assigned to you. You can choose to receive email notifications immediately or receive one email notification per day – daily digest. The daily digest will include a list of all the items awaiting your review or action. The daily digest is sent at 12:00 pm daily.

Manage Email Notifications

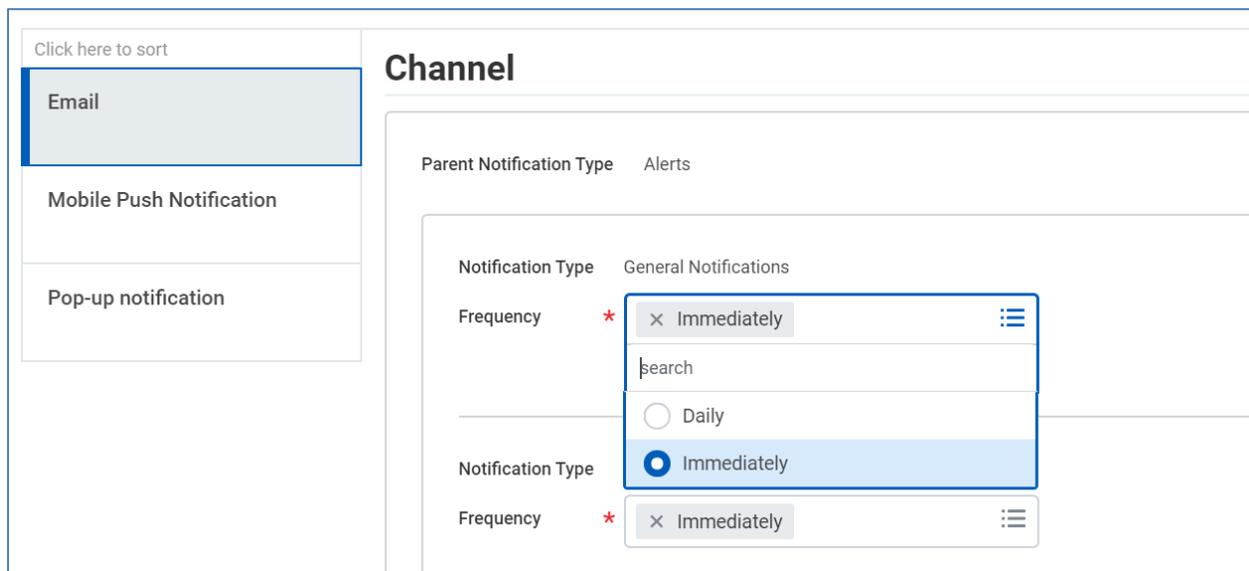
- 1) From the *Workday Homepage*, click the *cloud icon* in the top right corner.



- 2) Click on **My Account** and then click **Change Preferences**.



- 3) Scroll down to the **Channel** section.
- 4) Browse through the **Notification Types** for those you wish to change the notification frequency.
- 5) Click the **prompt** icon in the **Frequency** field and select the frequency you would like to receive notifications.
 - Immediately: notifications are delivered immediately to your MSU email
 - Daily: an email digest with all tasks will be sent to your MSU email at 12:00 pm ET



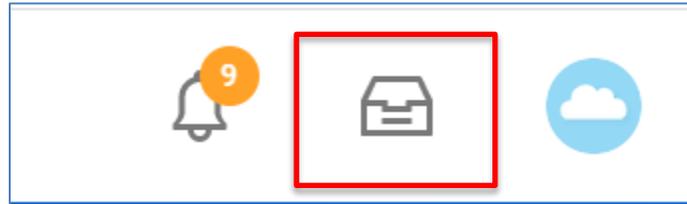
- 6) Click **OK**.

Workday Inbox Filters

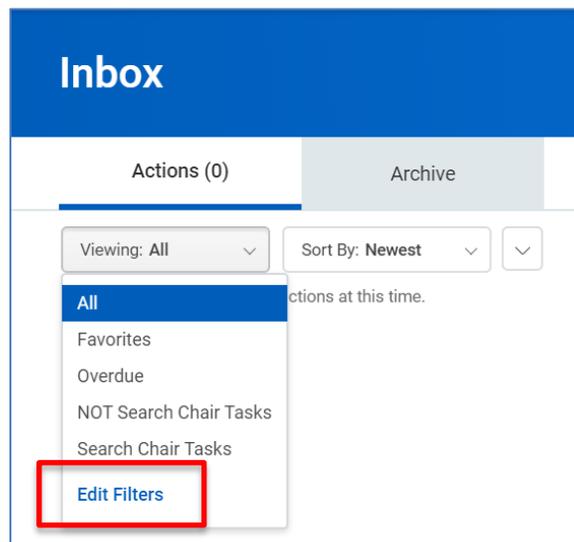
Inbox filters are customizable filters that allow you to quickly sift through all of the items in your Workday Inbox.

Create an Inbox Filter

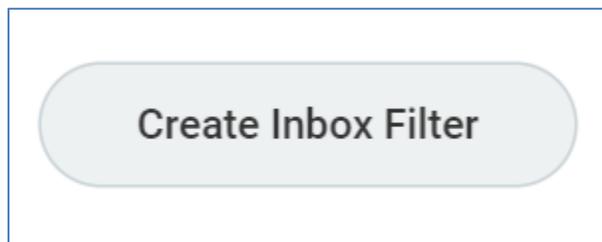
- 1) From the Workday Homepage, click on the Inbox in the top right corner.



- 2) Click the **Viewing** dropdown and select **Edit Filters**.



- 3) Click **Create Inbox Filter**.



- 4) Enter a meaningful description of the filter you are creating in the **Description** field.
- 5) Leave the **Maximum Row Limit** at 200. This is how many records at a time will be returned.
- 6) Under **View Definition**, select whether you want to return all business processes or a specific kind.

- 7) **Tasks** include actions in the system such as Approvals, To Do's, etc. Click the **prompt** icon and select a task(s) if you wish to sort by the task type.
- 8) **Conditions** will add one or more conditions to your filters. Click the + if you wish to add conditions.

Create Inbox Filter

Inbox Filter (empty)

Description *

Maximum Row Limit

View Definition

For all Business Processes

Business Process Type(s)

Task(s)

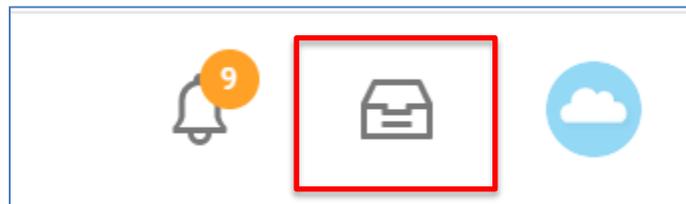
Conditions 0 items ☰ ☰ ☰

	And/Or	(*Source External Field	*Relational Operator	Comparison Type
No Data					

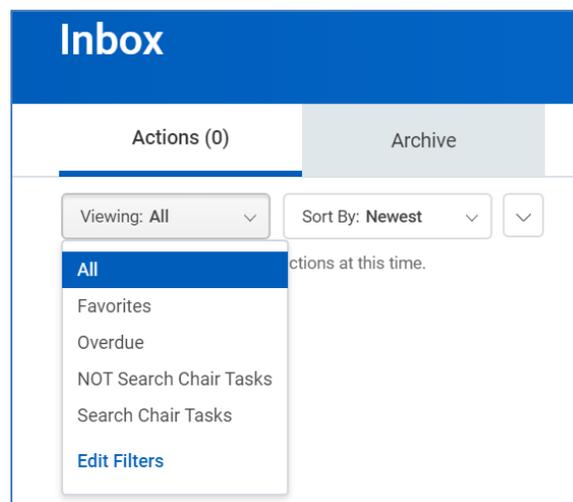
9) Click **OK**.

Applying an Inbox Filter

- 1) From the Workday Homepage, click on the Inbox in the top right corner.



- 2) Click the **Viewing** dropdown and select the filter you created from the list.



Dashboards in Workday

Dashboards are pre-configured pages related to functional areas within Workday. They are populated with related charts and data. Some may also include related tasks, menus, and announcements. In Workday, data can be entered using “tasks” and viewed using “reports.”

The Workday Home page displays worklet icons that provide access to tasks and reports in the *Applications* section. There are six (6) required applications which are assigned to all user in Workday. Based on your specific roles in the system, your Applications section may have more than the standard applications included. Note – Regardless of how many defaulted worklets are in the Application section, a maximum of twenty (20) worklets can be displayed at any given time.

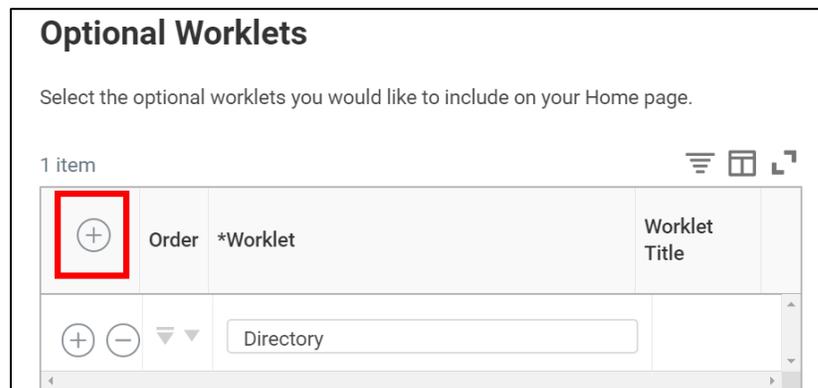
Configure the Homepage Dashboard

Note: Some dashboards may not allow the end user to remove or add applications. This will vary based on MSU’s security settings.

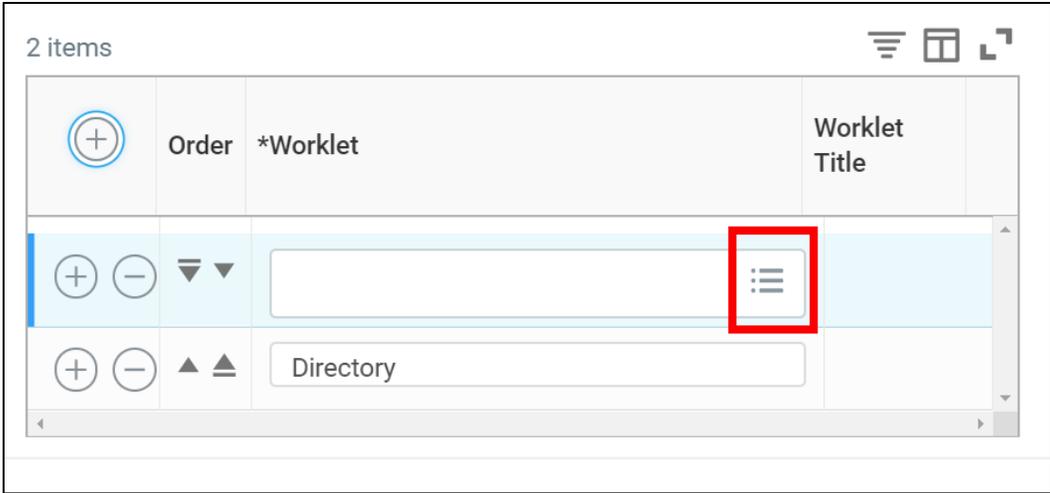
- 1) From the Homepage, click the **Settings** icon.



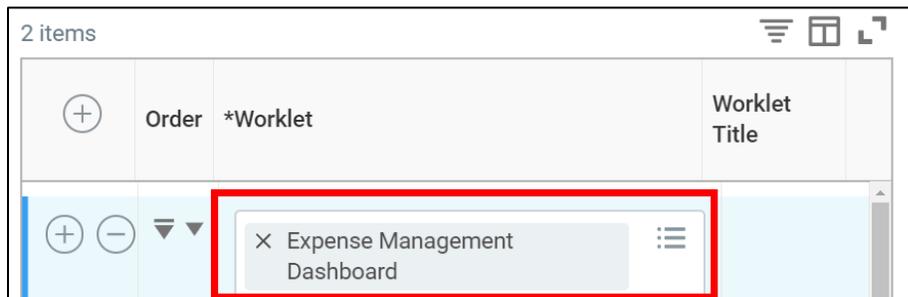
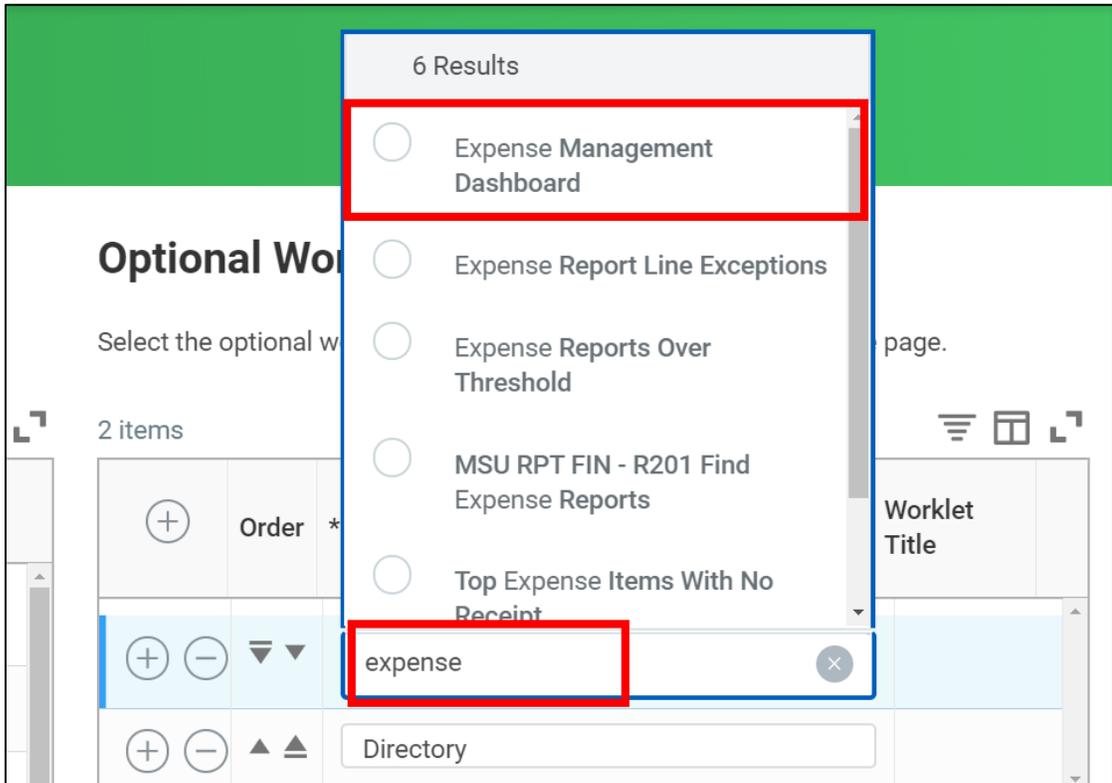
- 2) Under **Optional Worklets**, click the **Add Row** icon to add a new application.



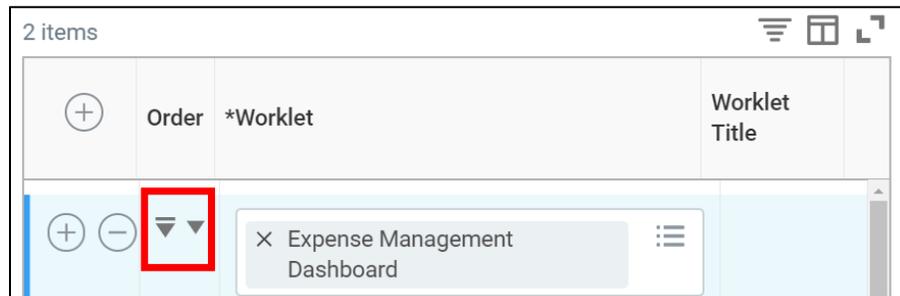
- 3) Click the **Prompt** icon and select **All** to view the list of existing applications, or type the name of the application in the search field.



- 4) Select the application or dashboard to be added. For this example we will be adding the *Expense Management Dashboard* by typing expense in the search field.



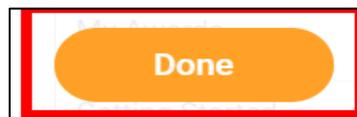
- 5) Click the **Move Row Up** or **Move Row Down** arrow to reorder the applications on the page.



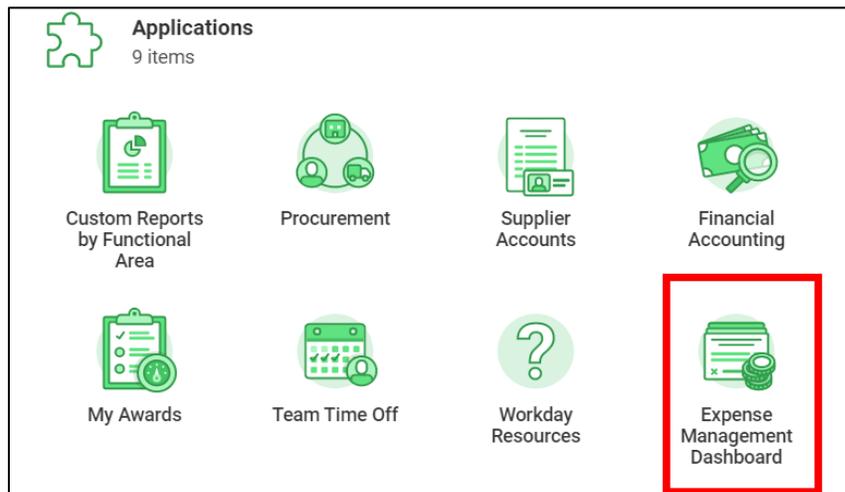
- 6) Click **OK** at the bottom of the screen.



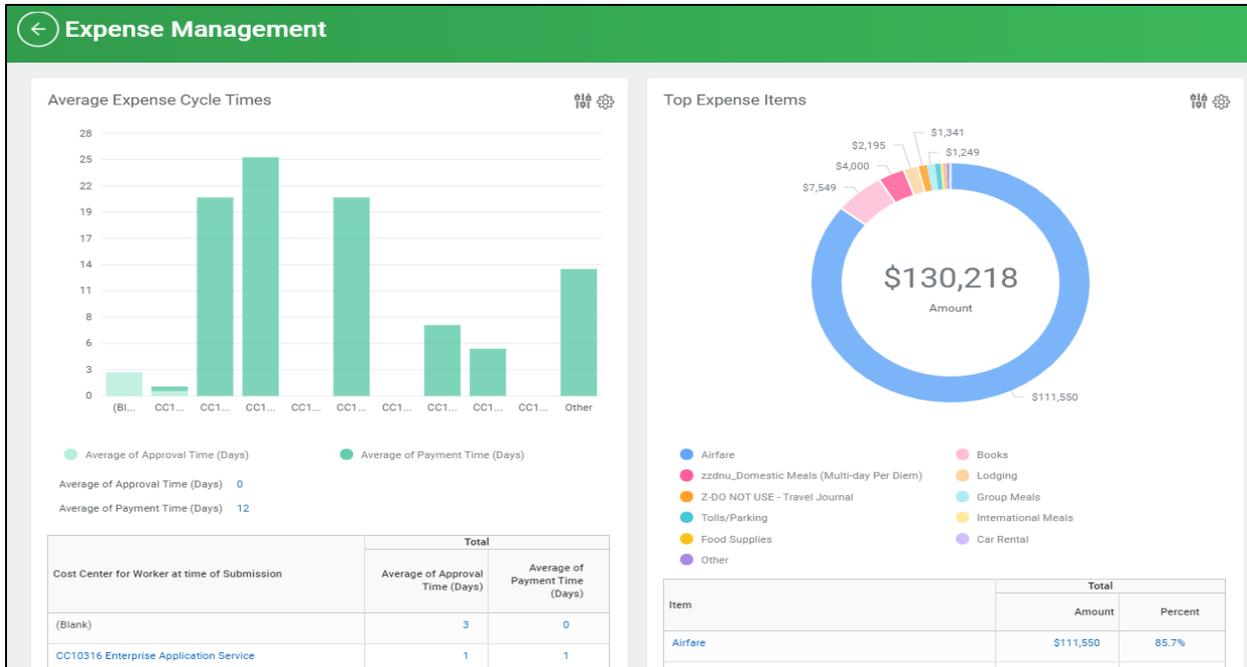
- 7) Click **Done** at the bottom of the screen to be directed back to the Homepage.



- 8) Under the **Applications** section, check to see if the application has been successfully added. Click the newly added application to be directed to the dashboard.



The dashboard displays data related to the specific area. Each window in the dashboard helps to analyze the data from different points of view.



Favorites

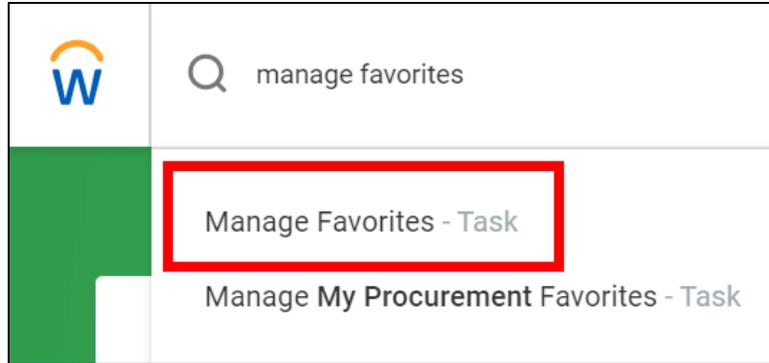
Reports, tasks, or business objects (cost centers, employees, organizations) that are used often can be added to your favorites. **Favorites** can be found in the **Favorites** application or under favorites in the profile menu.

IMPORTANT: The Favorites application does not automatically appear and needs to be added manually. The **Favorites** application can be added following the steps in the **Configure the Homepage Dashboard** section above.

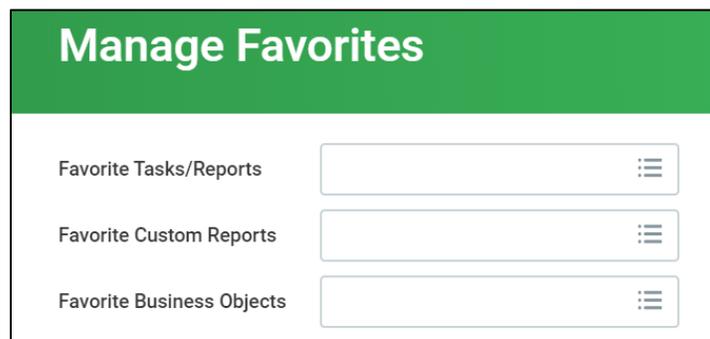


To add to **Favorites**, follow the steps below:

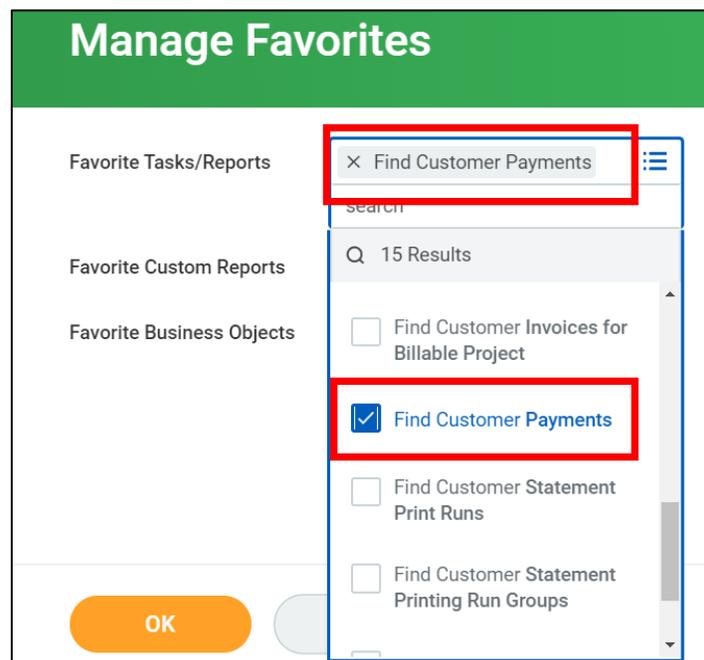
- 1) Enter **Manage Favorites** into the *Search* bar and select it from the results.



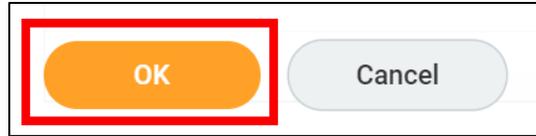
- 2) From the *Manage Favorites* screen, click the menu prompts in the **Favorite Tasks/Reports, Favorite Customer Reports** or **Favorite Business Objects** to browse available items. Another option is to type the name of an item and hit enter.



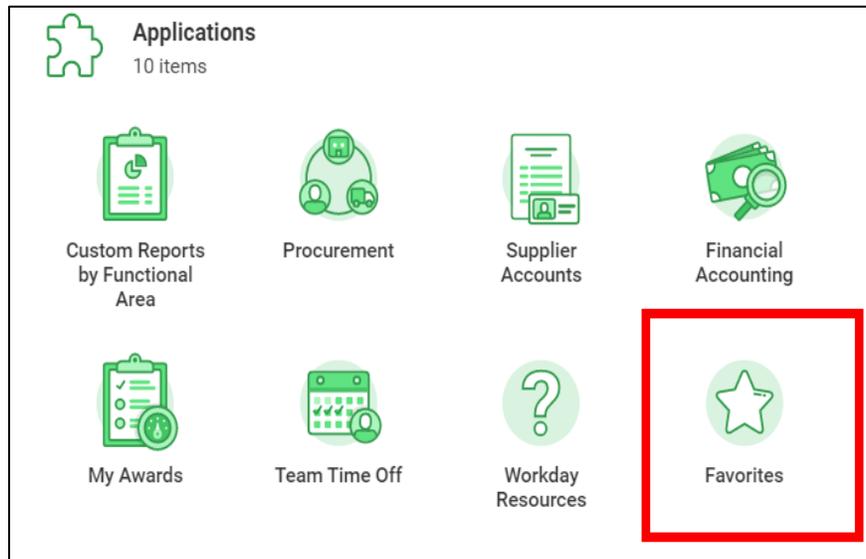
- 3) Click on the item browsed or typed to add it to the field(s). For this example, we will be adding the *Find Customer Payments for Organization* report.



- 4) Click **OK** at the bottom of the screen, then click **Done**.



The report appears when the **Favorites** application is opened.

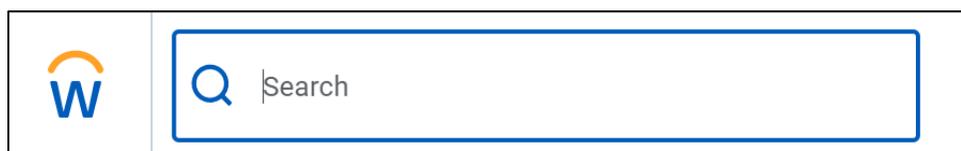


Reports in Workday

Workday provides numerous **Standard Reports** which can be adjusted to fit the end-user needs. These reports can be exported to Excel in order to work with the data or can be filtered and saved within Workday. Reports appear on **Dashboards** using live data which can be drilled into. This provides the end-user with real-time, accurate data to assist with the completion of business processes and data analysis. There are also **Custom Reports** by Functional Area within Workday that have been configured based on MSU specific needs and business processes.

Access Standard Reports

- 1) From the **Search** field, search keywords or the name of the report.



- 2) Under the *Tasks and Reports* section, locate & click the name of the report to be run. **Note:** Select **More** to expand the list of search results.

Search Results 41 items

Tasks and Reports

[Expense Budget Variance](#)
This composite report lists for expense accounts the current year budget, YTD budget, YTD actuals, variance and % remaining. This report is prompted for a given org, plan and fiscal period. This reports answers questions...

[Expenses for My Organizations](#)
This report details the expenses for a manager's supervisory organizations trended by calendar period. The expense amounts are summarized by supervisory organization roll up. This report requires prompts for From and To ...

[Create Expense Report](#)

[Credit Card Transactions Not Expensed](#)
This report returns a list of credit card transactions with a status of new that have been loaded, but not added to an expense report. This report accesses the Credit Card Transactions (Indexed) report data source and u...

[+ More \(14\)](#)

- 3) Depending on the report, enter parameters if applicable. For example, when running the *My Expense Reports* report, the report can be filtered down by Expense Report Status. Or, this field can be left blank to show all expense reports within the specified date range.

My Expense Reports

Expense Report Status

Report Date On or After 09 / 13 / 2019

Report Date On or Before 11 / 13 / 2019

My Expense Reports

Expense Report Status

Report Date On or After

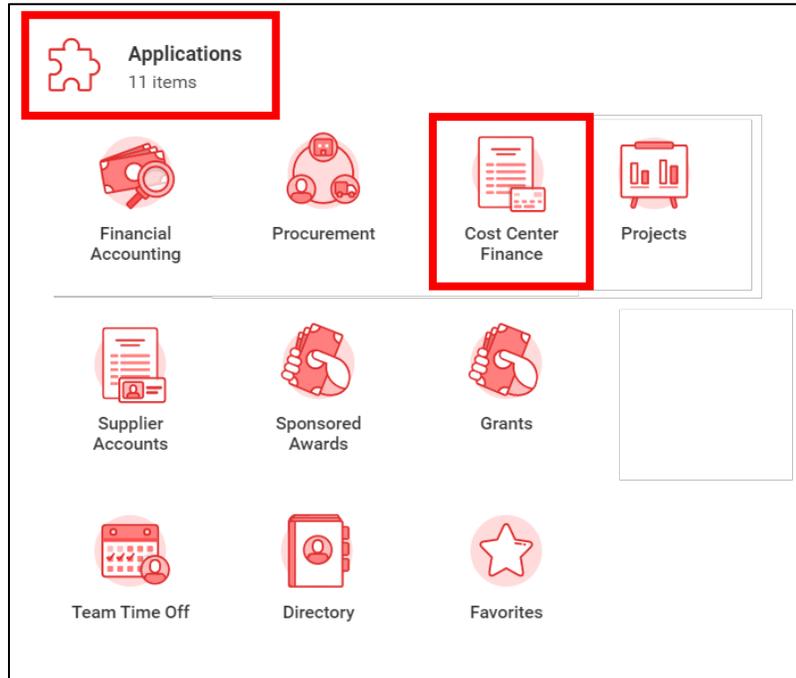
Report Date On or Before

Approved
 Canceled
 Draft
 In Progress

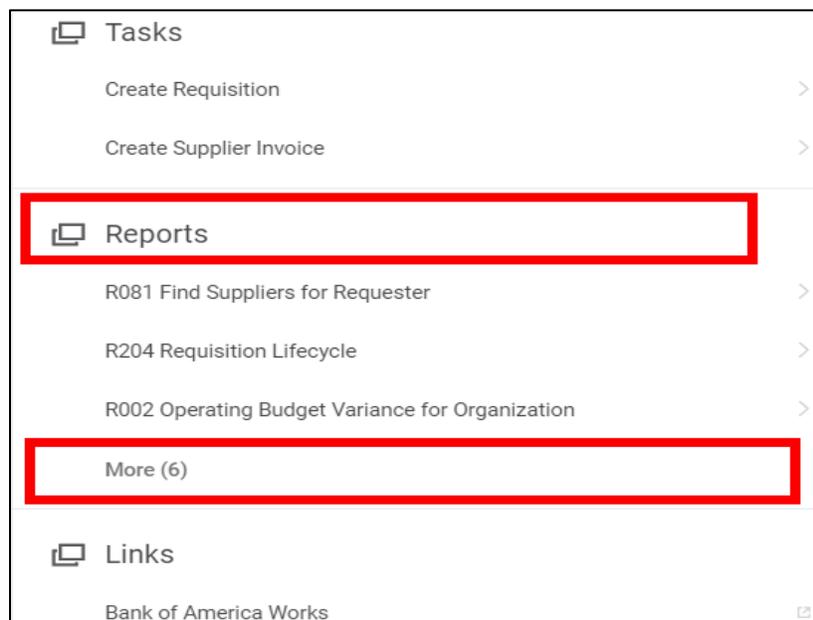
4) Click **OK** to view the report.

Access Reports Related to Functional Area

1) From the Homepage, under the Applications section, click the **Application** icon related to the functional area. For this example, we will access the reports related to the **Cost Center Finance** which will be used by Requisitioners.



2) On the right-side of the screen, under **Reports**, is a list of reports related to this functional area that are frequently used in relation to business processes. **Note:** Click **More** in the Reports list to expand and view the full list of reports available.



Using Workday Reports

You can easily manipulate the information that displays in your selected report, including filtering the information and exporting the list to Excel. You can also choose to have the report exported as a .pdf so that you can print it out.

Exporting a Report to Excel

- 1) From within the report, in the upper right corner of the report, click on either one of the two **Excel** icons.

Note: If you click on the top icon, you will get the entire header of the report. If you click the bottom icon, you will only get the header row of the report.

Payment	Transaction ID	Payment Date	Customer	Payment Status	Application Status
CP-00000017	09/11/2019	Continued Professional Education Services	In Progress	Unapplied	

- 2) The entire report exports into an Excel worksheet. If it displays as minimized on the Task Bar at the bottom of the screen within the browser, click the Excel icon to open the file.

Printing a Report

- 1) From within the report, click the **Print** icon.

Payment	Transaction ID	Payment Date	Customer	Payment Status	Application Status
CP-00000017	09/11/2019	Continued Professional Education Services	In Progress	Unapplied	

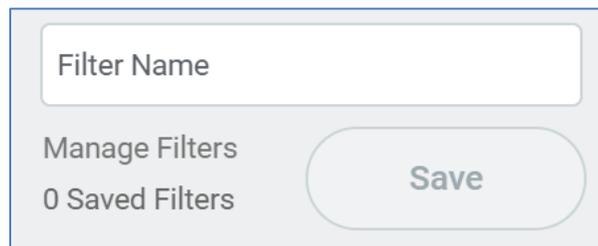
- 2) Workday exports the report as a .pdf. If it displays as minimized on the Task Bar, click the .pdf icon to open the file.

Saving a Favorite Filter

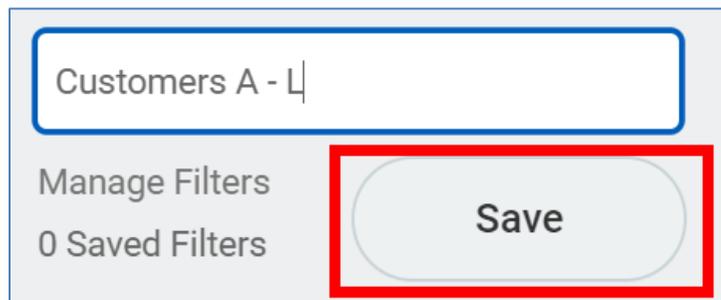
If you repeatedly run reports using the same filter data, you may save the filter setting in order to save time.

Note – While saving filter settings is available in many of the Workday reports, not all reports allow this functionality.

- 1) Select the parameters of a report.
- 2) Scroll to the bottom of the page (DO NOT run report), and in the **Saved filters** section, enter a name for the filter in the **Filter Name** field.

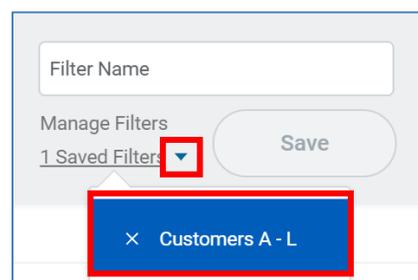
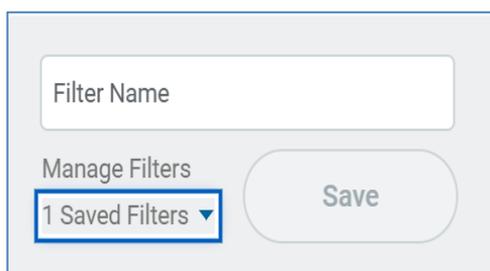


- 3) Click the **Save** button.



The newly saved filter appears in the **Saved Filters** list.

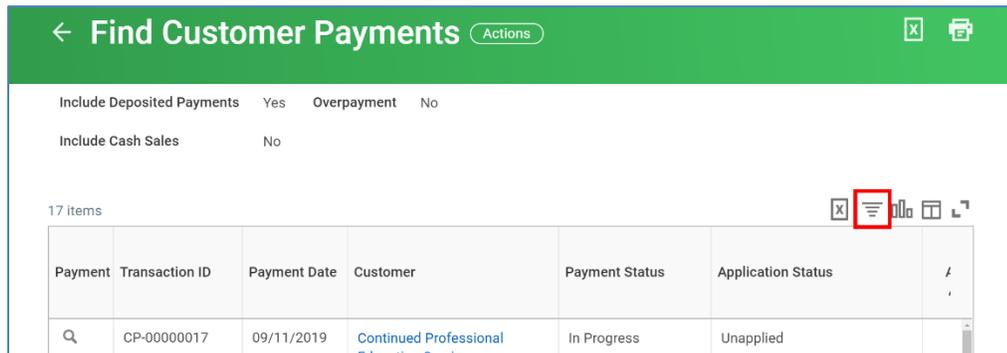
- 4) Click the down arrow to expand/view/use saved filters.



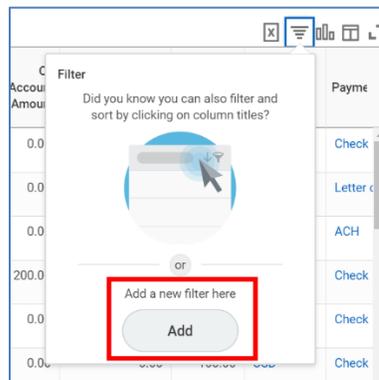
Filtering a Report

Once a report has been run in Workday, you may want to focus on some specific data. You can filter the displayed information of a report based on data within the report.

- 1) From within the report, click the **Filter** icon.



- 2) Click **Add**.



- 3) Select the column to filter the report from the dropdown menu. **Note:** Filters can be applied to multiple fields.

- 4) After selecting the filter criteria (for this example we used Payment), click **Filter**.

Add Filter

Column * Payment

Filter Condition * is

Value *

- CP-00000005 - 08/08/2019 - 75.00 - USD
- CP-00000004 - 07/23/2019 - 100.00 - USD

Filter Cancel

The report automatically displays the data based on the filtered criteria.

Adding a Chart to a Report

- 1) From within the report, click the **Expand/Collapse Chart** icon.

← Find Customer Payments Actions

Include Deposited Payments Yes Overpayment No

Include Cash Sales No

17 Items

Payment	Transaction ID	Payment Date	Customer	Payment Status	Application Status
Q	CP-00000017	09/11/2019	Continued Professional	In Progress	Unapplied

A default chart is displayed above the report.

- 2) Click the **Configure** icon  to change the chart type.



- 3) Additionally, click the **Configure** link to change the variables contained in the chart.

