The Report Navigation tip sheet is for all employees.

This tip sheet provides an overview of navigation and terminology related to reporting, including the following:

- Using prompts
- Difference between optional and required (red asterisk)
- Using Filters and Saved Filters
- Using drill-down (select blue text)
- Features listed within this tip sheet may be used across all Workday Reports.

Report Prompts

As a report is run, a prompt window may appear with various fields to populate prior to returning report results. Any field with an asterisk requires a value to be entered.

Save Entered Prompts as a Filter

On the prompt window for a report, you may see an option to enter a Filter Name. This allows you to save certain parameter values on the prompt menu so they do not need to be re-entered each time you run the report. After entering required prompts:

1. Enter the **Filter Name**.
2. Select **Save**.

The saved filter will be available in a drop-down list for future use. Select **Manage Filters** to view all available Filters.

Filter or Sort a Workday Report

1. When viewing a report, select a column header for which you would like to sort or filter to open the options window.
2. Workday provides options to sort or filter the data. Review the options to determine the best way to view the data.
3. Select from the following sort options.
   - **Sort Ascending:** Clicking Sort Ascending will list all records in alphabetical order, from A-Z.
   - **Sort Descending**: Clicking Sort Descending will list all records in alphabetical order, from Z-A
4. Select the **Filter Conditions** drop-down menu and select the appropriate filter condition. The available filter condition option varies based on field type.

5.   Enter the **Value** on which to filter. If a drop-down option is available, clicking the icon will reveal a list of all available values within the column. Click the square checkboxes to indicate which value(s) you would like to pull into your filter. Multiple values may be selected. You may also click in the **Value** field and search for a value.

6.   Once all values and conditions have been entered, select **Filter** to produce a new list of results.

7.   To remove the filter, click on the column header and then select **Remove Filter**.

Drill Down option in Report Results

Click on any blue hyperlinked value to view the details that support that value.

You can also click the drop-down arrow to the right of the value to display the menu that allows you to:

- view the data grouped by various fields

- view the details

- export the results to Excel or PDF

Reporting Icon Glossary

While navigating through Workday reports, you will interact with the following icons while searching for or analyzing reports.

Icon	Description
	The related action icon can be used to display a menu of options to act upon a business object.
	Next to the report name, select the Change Selection icon to edit the prompt values and return new results. Next to a chart, select the Change Selection icon to edit the chart format.
	Select View Printable PDF give you the option to export and download the report results to an Excel spreadsheet or PDF document with the full report name and prompts entered at runtime.
	Select Export to Excel to export and download the report results as an Excel spreadsheet.
	Select Export to Worksheets, to view the report data in Workday's internal version of Microsoft Excel.

Icon	Description
	Select this icon or any of the column headers to add a filter to the report table. The filter guide will first request the column name, then ask the filter condition and value. This icon turns blue to indicate a filter is currently applied.
	The expand/collapse chart icon provides the option to switch the results in a matrix report from a table view to a chart view.
	This expand icon will take the data from the report and expand it to occupy the entire, available browser window.
	Select this icon to print a properly formatted version of the page you are viewing.