



Workday Tips

Workday Tips provide quick solutions to common questions about Workday business processes. Please review and share them broadly with anyone in your department who initiates business process transactions in Workday. All Workday training guides are updated regularly. Please make sure to reference the latest guides, available on the Workday training site at <http://workday.yale.edu/training>.

REPORT CATEGORY	WORKDAY TIP
Fixed Duration <i>Some systems (i.e. building access, ID Center) use term assignment end dates as the end period for ID card access to labs and buildings.</i>	<p>To monitor an upcoming ending for a term assignment, use the "Fixed Duration - Term End Date (Partners) - Yale" report.</p> <p>Please note: access to this report is restricted to these roles: Business Partner, HR Partner, Department HR Support Specialist, and Strategic Business Partner.</p>
Tasks Awaiting Action by Me	<p>The fastest way to find tasks awaiting your action is to open your Workday Inbox.</p> <p>Alternately, you can run the Workday Report entitled "Business Processes Awaiting Action by Me - Yale".</p>
Accessing Reports from the Dashboard Worklet  Dashboards	<p>Dashboards are designed to simplify navigation by placing key management information for interactive analysis in a single location. The Dashboards worklet appears on the home screen of users assigned to roles that have been granted access to view various reports and charts.</p> <p>A variety of dashboards have been created for different business needs. You'll find the list of reports housed in your Dashboards worklet specifically recommended for your role.</p>
Using Yale Custom Reports Worklet  Yale Custom Reports	<p>The Yale Custom Report worklet displays a list of reports ending with "- Yale", indicating that these reports have been developed and customized for Yale. Click the Yale Custom Reports worklet to display a categorized list of these reports. Select a category to view a detailed list (see example on the following page).</p> <p>Please note: Access to reports and data is based on the Workday role(s) you hold. Data will only be displayed on reports to which you have been granted access.</p> <p>If a report does not display information, and you believe you should have access to the data, please have a discussion with your lead administrator to determine the appropriate level of access.</p>

