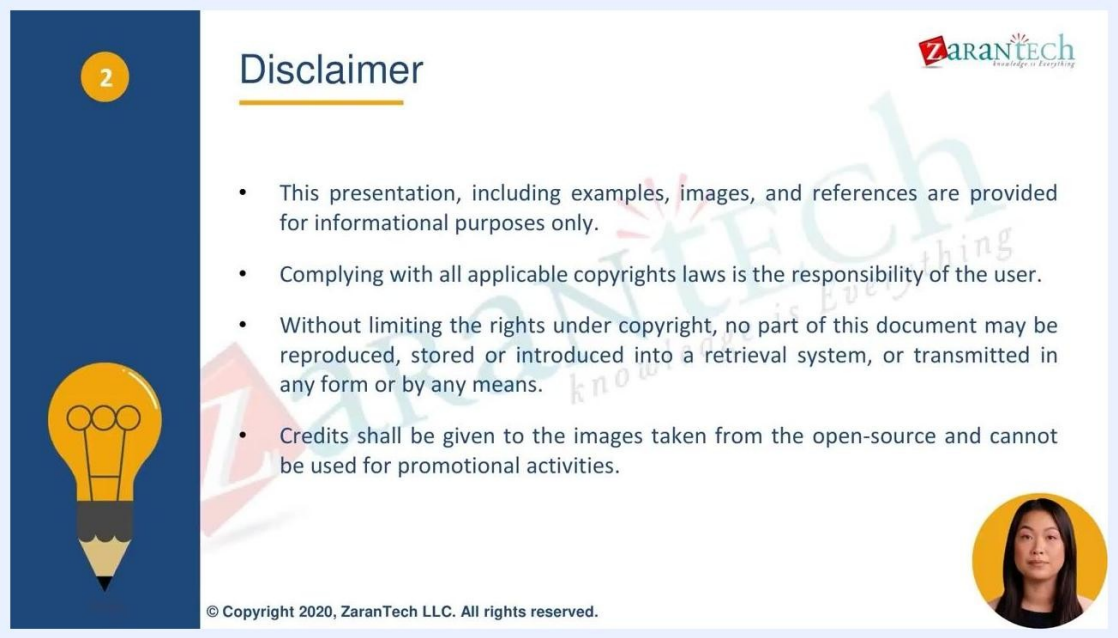
How to Create a Custom Report in Workday

This guide explains how to create a custom report in Workday, from selecting a data source through configuring columns, sorting, and filters. Follow the steps below to build a report that fits your organization's reporting needs.



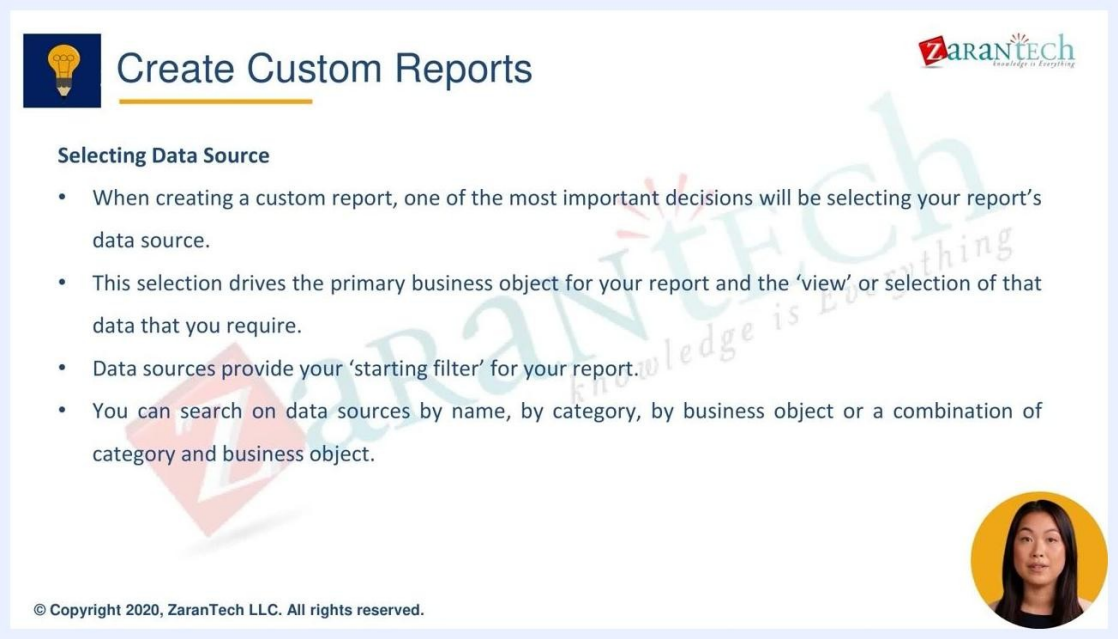
Disclaimer slide with copyright and usage information, including a small photo of the presenter in the corner

Prerequisites

Before you start, it helps to understand the data source types available in Workday, since the data source you choose determines the primary business object and starting view for your report:

- Standard: Multiple data sources can be delivered for the same business object, each representing a different view.
- Indexed: Fewer data sources are needed for the same business object. You can apply data source filters to a single indexed data source to create different views. Indexed data sources are optimized for performance, aggregation, and faceted filtering, and are delivered for high-volume areas such as Workers, Time Blocks, and Journal Lines.

- Custom: A data source you define yourself for specific reporting needs.



Slide explaining the importance of selecting the data source, how it drives the business object and view, and the available search methods

Because the data source is the most critical step in the process, keep this distinction in mind before you begin building your report.

Step 1: Open the Create Custom Report task

Navigate to the Create Custom Report task in Workday. This is where you name your report, choose a report type, select a data source, and optionally mark the report as temporary.

Step 2: Review the key configuration steps

Before configuring your report, review the sequence you will follow:

- Choose a report type and data source.
- Select the fields to include (objects or simple types such as text, numbers, or dates).
- Order the columns as needed.
- Sort the output (optional).

- Define filter criteria (optional).

Screenshot of the "Create Custom Report" screen showing fields for Report Name, Report Type, Data Source, and Temporary Report checkbox

Step 3: Choose a report type

Workday offers several report types, each suited to different reporting needs:

- Simple: Select fields, sort, and filter on a single object.
- Analytic: Aggregate fields using counts, sums, and averages.
- Matrix: Generate pivot table-style reports for comparisons.

- Advanced: Use advanced reporting expressions for maximum flexibility.

Screenshot showing the "Create Custom Report" dialog with a dropdown menu listing report types: Advanced, Composite, Matrix, nBox, Search, Simple, Transposed, Trending

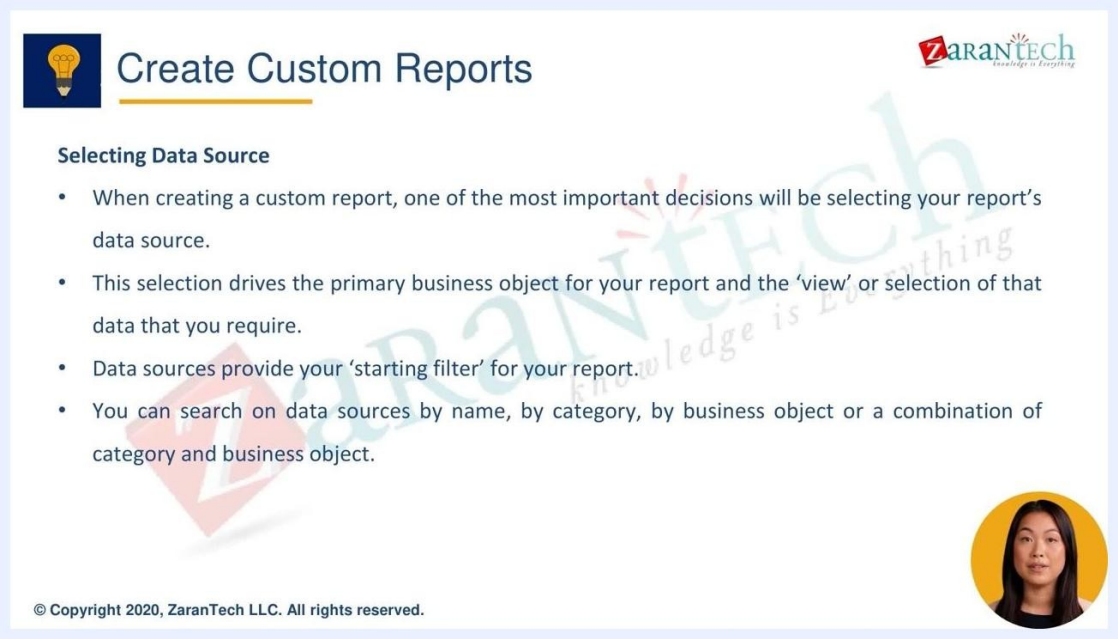
The dropdown menu also includes Composite, nBox, Search, Transposed, and Trending as additional report type options.

Step 4: Compare report type layouts

Before committing to a report type, you can compare how each one presents data:

- Advanced: Detailed, flexible reports with multiple configuration options.
- Search: Focused on finding and filtering data.
- Matrix: Displays data in a pivot table format for easy comparison.
- nBox: Visualizes data in a grid or box format.
- Transposed: Swaps rows and columns for alternative data views.
- Trending: Shows data trends over time with charts.

- Composite: Combines multiple data sets or views in one report.



Collage of Workday report type screenshots labeled Advanced, Search, Matrix, nBox, Transposed, Trending, and Composite, each showing a different report output style, including tables, charts, and grids

Step 5: Select the data source

Selecting the correct data source is one of the most important decisions when creating a custom report, since it determines:

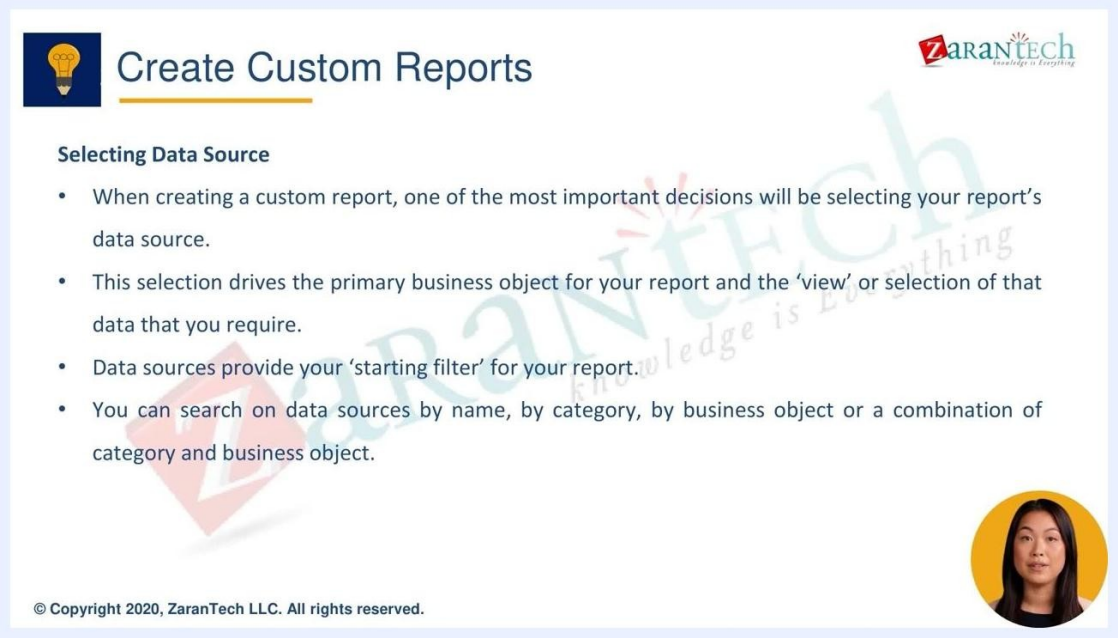
- The primary business object for your report.
- The "view" or selection of data required.
- The starting filter for your report.

You can search for a data source by name, category, business object, or a combination of category and business object.

Step 6: Search for and preview a data source

In the Create Custom Report dialog, enter the report name and select the report type (for example, Simple). Use the search field under Data Source to find the data source you need.

You can filter results by primary business object—for example, filtering by Employee shows options such as All Active Employees or All Terminated Employees. Use the Preview button to review a data source before selecting it.



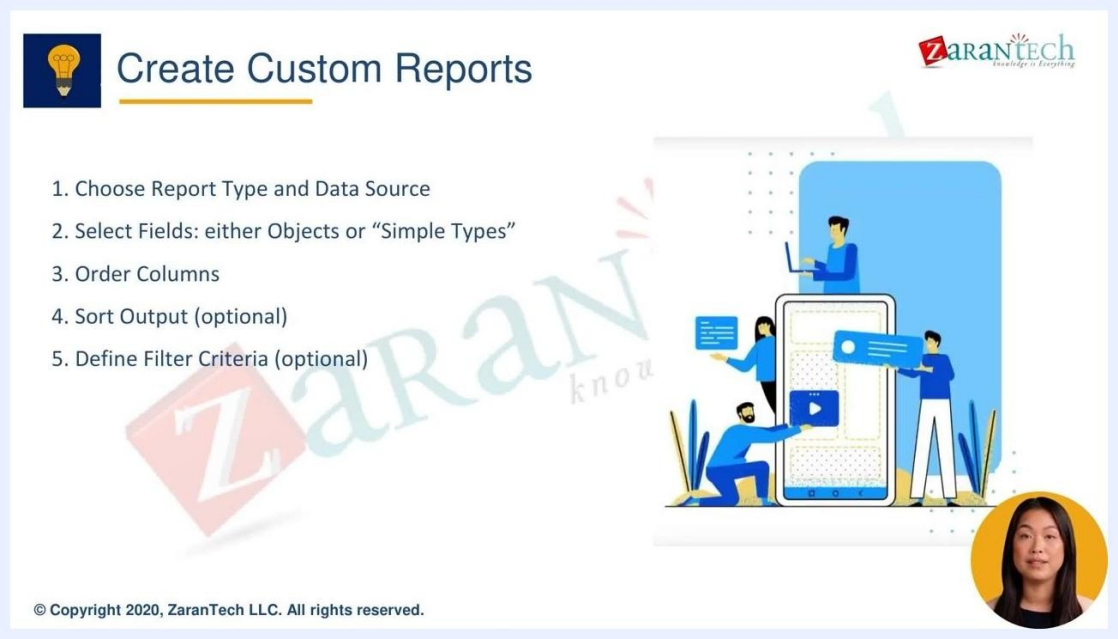
Screenshot of the "Create Custom Report" dialog with Report Name, Report Type set to Simple, a Data Source search field, and a list of data sources filtered by primary business object "Employee," with the Preview button visible

Step 7: Configure the Columns, Sort, and Filter tabs

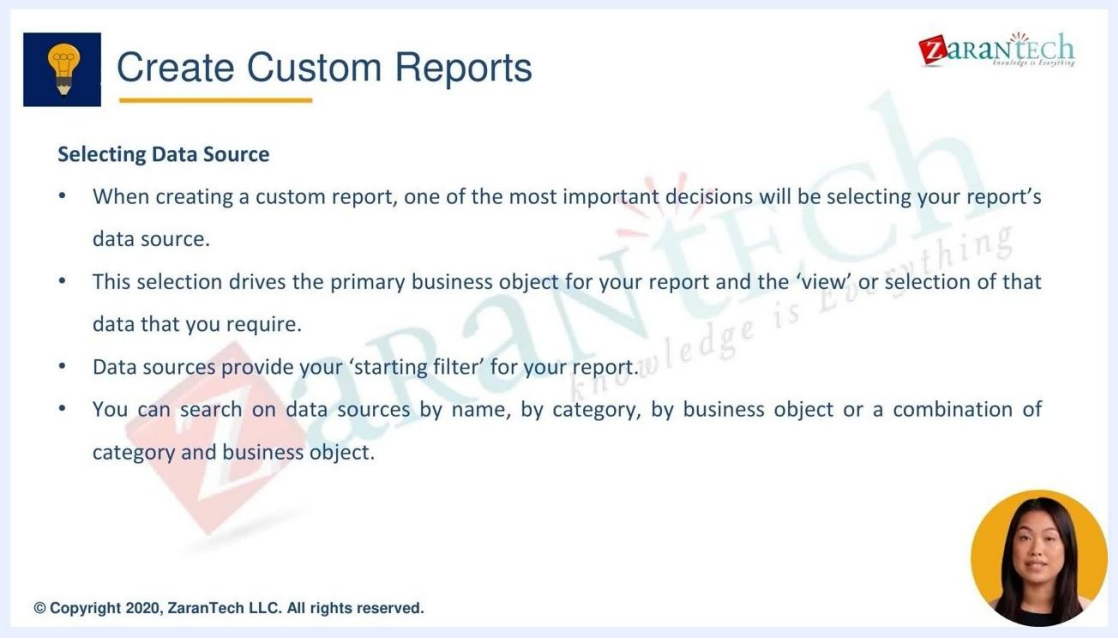
For Simple reports, configure your report using three main tabs:

- Columns: Select and arrange the fields to display in your report.
- Sort: Define the sort order for your report results.

- Filter: Set filter criteria to narrow down the data shown.



List of key steps for creating custom reports, including choosing report type and data source, selecting fields, ordering columns, sorting output, and defining filter criteria, illustrated with people working on a large mobile device

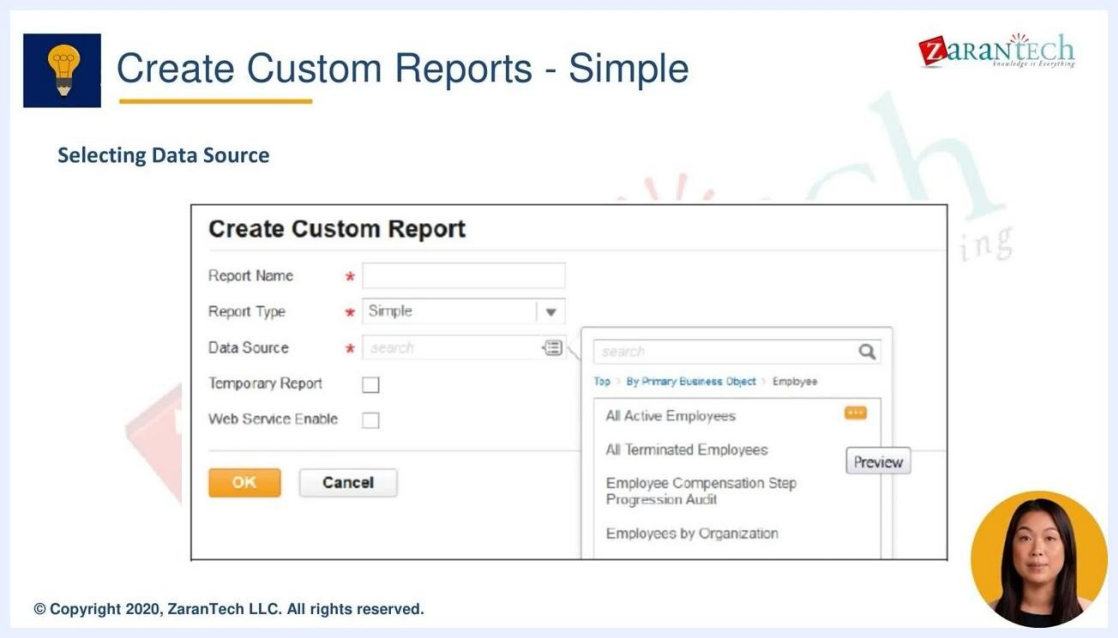


Screenshot of the "Edit Custom Report" screen for a Simple report, highlighting the Columns, Sort, and Filter tabs, with callouts for configuring columns, changing order, overriding labels, and field options

You can also add or remove columns, change the order of fields, override column labels, and set field options such as displaying currency symbols.

Step 8: Preview and finalize your report

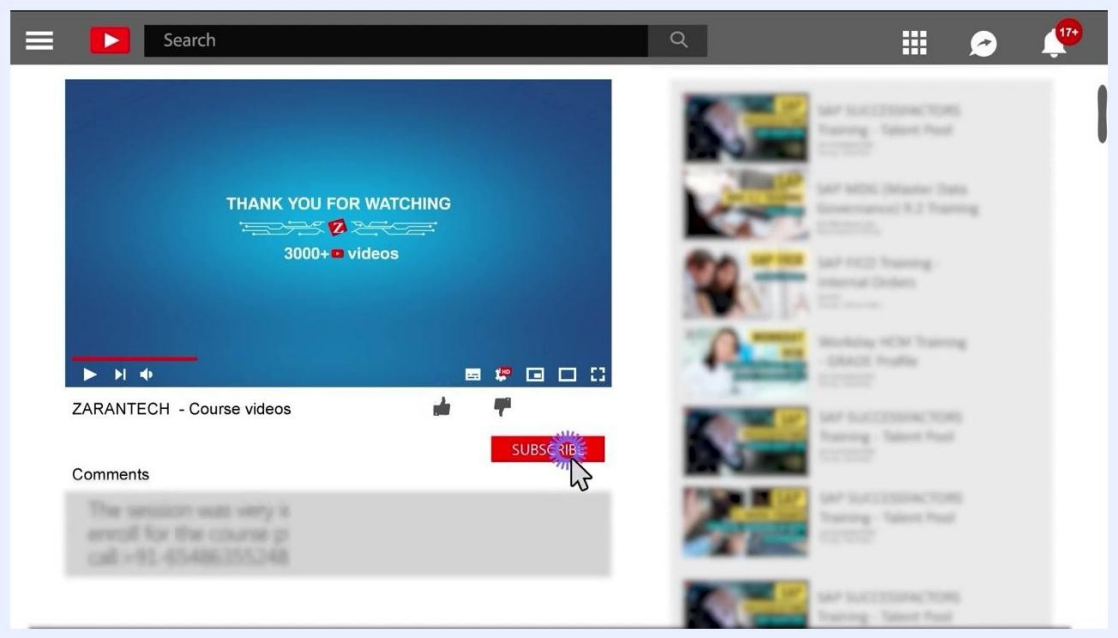
After configuring your columns, sort order, and filters, review your selections. Use the Preview button to see a sample of your report output, and make adjustments as needed before saving and running the report.



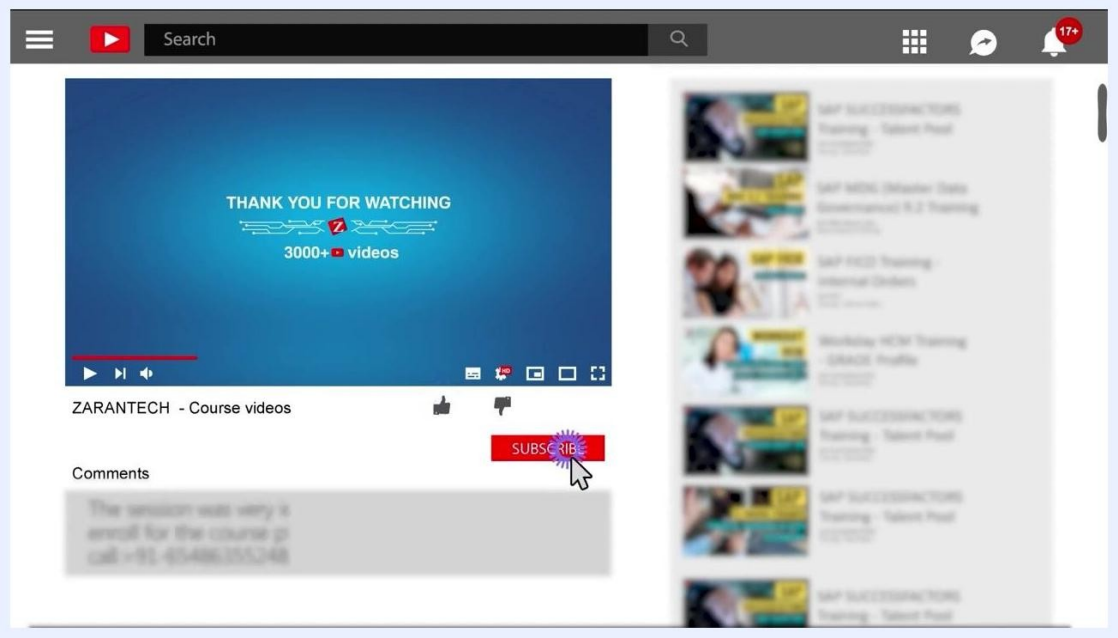
Screenshot of the "Create Custom Report" dialog showing the Data Source search and preview options, reinforcing the process of reviewing and finalizing report selections

What's next

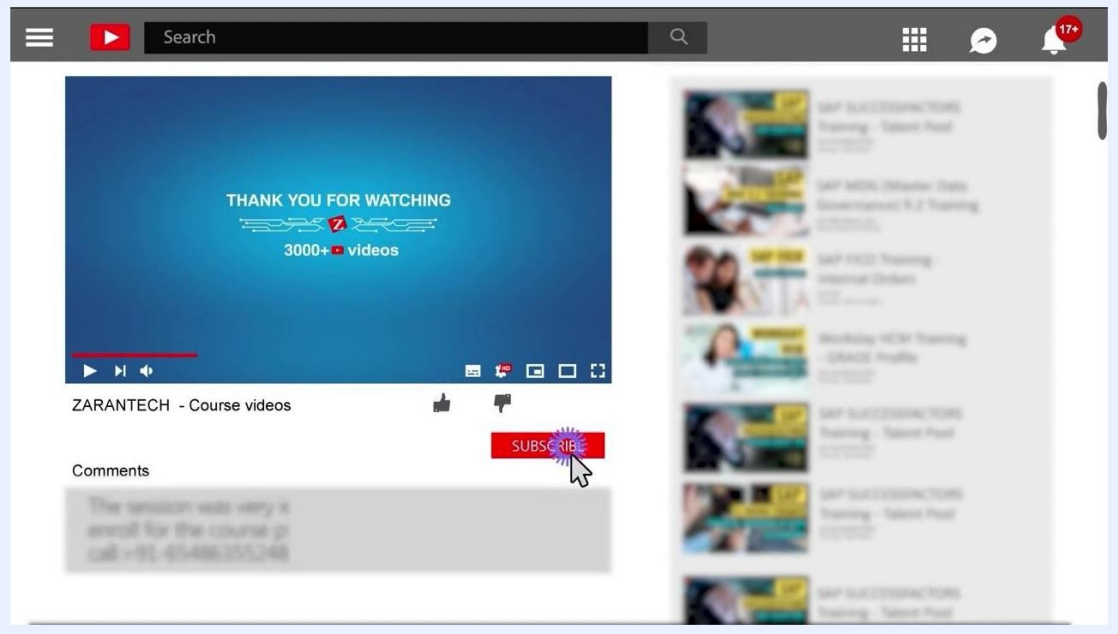
Once your report is saved and running, keep in mind the difference between standard and indexed data sources for future reports: standard data sources offer multiple views for the same business object, while indexed data sources are optimized for performance and are best suited for high-volume areas like Workers, Time Blocks, and Journal Lines. Choosing the right type for each new report will help you get the most accurate and efficient results in Workday.



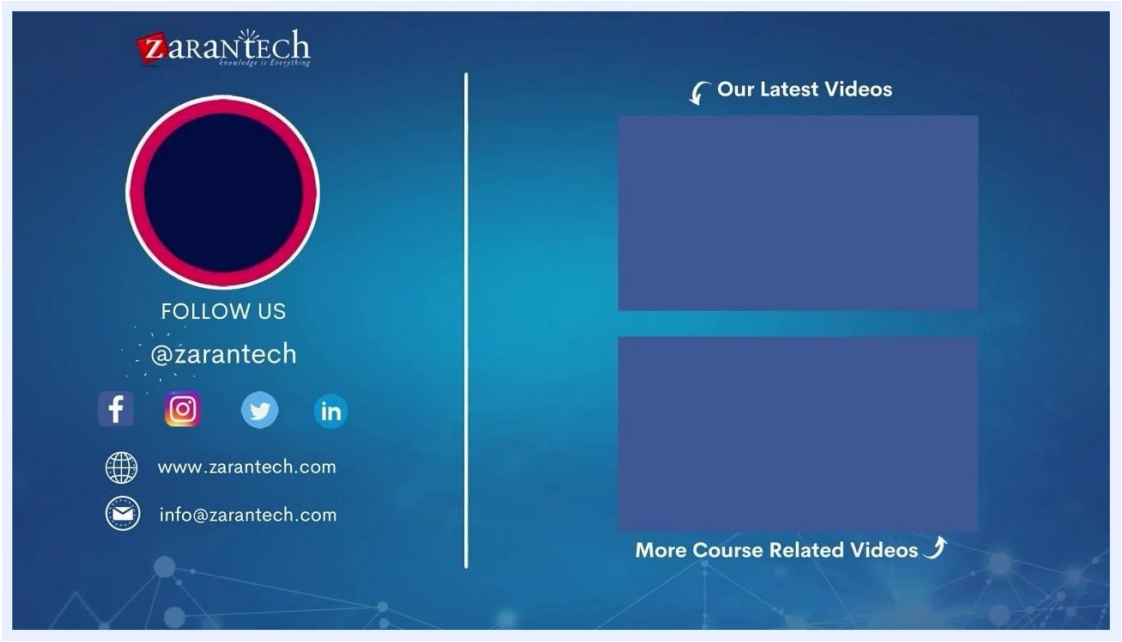
A blue gradient screen with a handshake icon, large "Thank you" text, and the message: "For more information please visit our website www.zarantech.com".



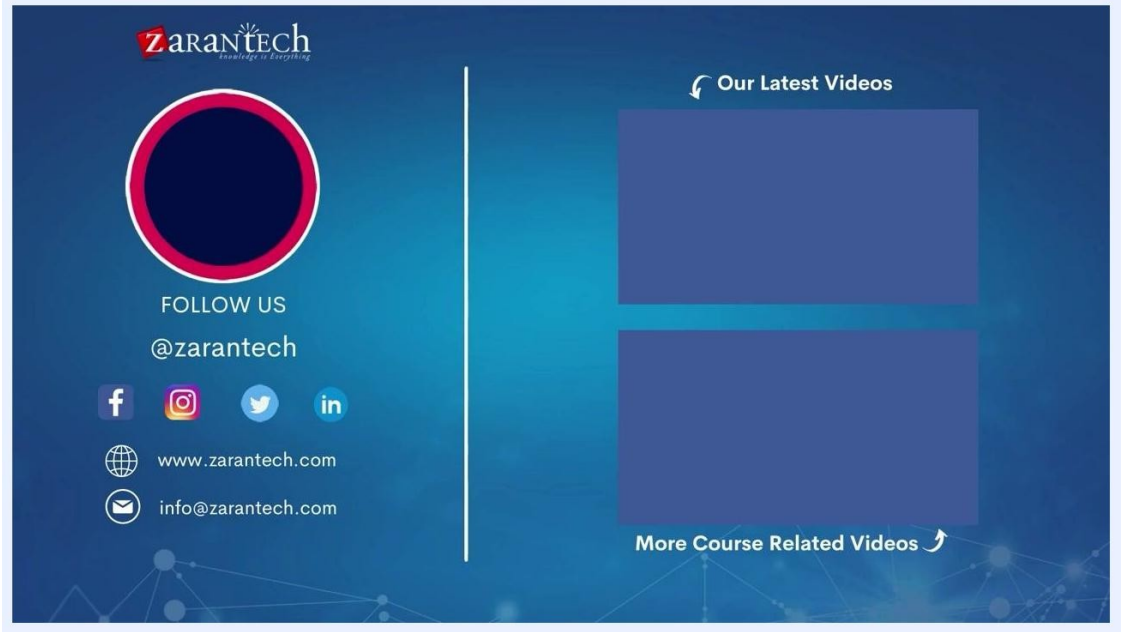
YouTube video page showing "THANK YOU FOR WATCHING", "3000+ videos", the "SUBSCRIBE" button being clicked, like/dislike icons, comments section, and related videos.



YouTube video page showing the "Subscribed" button, confirming the user is now subscribed to the channel.



Blue background with Zarantech branding, social media icons, website and email info on the left, and placeholders for latest and related videos on the right.



End screen with Zarantech branding, social media, website, email, and video placeholders for further engagement.