

How to create a Wdata query in Workiva

This guide walks you through how to create a Wdata query in Workiva, from reviewing your source tables to building joins, customizing the display of your results, applying parameters and filters, and configuring a Crosstab for pivoted reporting. By the end, you will know how to assemble a query that combines data from multiple tables and exports the results in the format you need.

Prerequisites

Before you begin, make sure you have access to the tables you plan to query. In this guide, the example uses a fact table ([GL Data](#)) containing numerical data, and two dimension tables ([Account Mapping](#) and [Entity Mapping](#)) containing descriptive attributes.

1. Review the available tables

Open your tables and confirm their structure before building a query. The fact table ([GL Data](#)) includes columns such as Company Code, Period, Account, and Amount. The dimension table ([Account Mapping](#)) includes columns such as Account, Account Name, Account Group, Account Group2, and Account Group3.

Preview the data in each table to confirm the structure and contents match what you expect to use in your query.

Description: Account Mapping Dimension Table

COLUMN NAME	DESCRIPTION	COLUMN ID	COLUMN TYPE	IMPORT FORMAT	KEY
account	Enter column description	account	Text		
account_name	Enter column description	account_name	Text		
account_group	Enter column description	account_group	Text		
account_group2	Enter column description	account_group2	Text		
account_group3	Enter column description	account_group3	Text		

Table Preview

ACCOUNT	ACCOUNT_NAME	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3	TAGS	FILENAME	TIMESTAMP	USERID	KEY
200000	Accounts Payable	Current Liabilities	Liabilities	Balance Sheet	[]	Wdata_example_a...	2021-10-12 20:0...	VOZVZVYHtEw...	b552a4336688f...
400003	Furniture/HomeGoods...	Commercial Sales	Revenue	Income Statement	[]	Wdata_example_a...	2021-10-12 20:0...	VOZVZVYHtEw...	9722214fa82670...
610005	Administrative	Expenses	Operating Expenses	Income Statement	[]	Wdata_example_a...	2021-10-12 20:0...	VOZVZVYHtEw...	fead06b99a861f...
100200	Merchandise Inventories	Current Assets	Assets	Balance Sheet	[]	Wdata_example_a...	2021-10-12 20:0...	VOZVZVYHtEw...	0b378c4890952...
820100	Licenses	General & Administrative...	Operating Expenses	Income Statement	[]	Wdata_example_a...	2021-10-12 20:0...	VOZVZVYHtEw...	87c46d16685a89...

Datasets

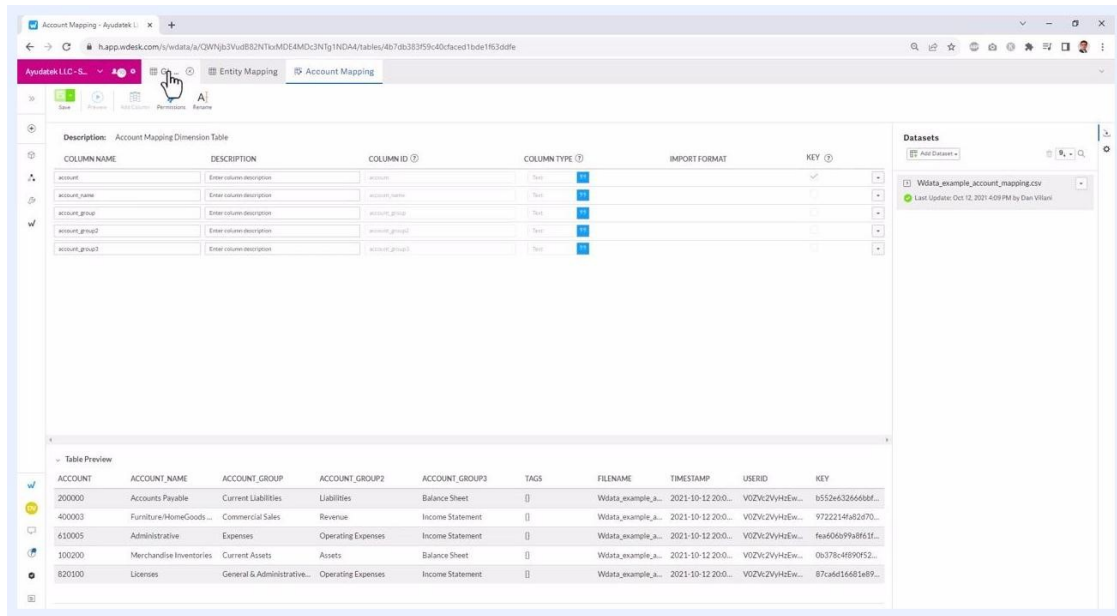
- Wdata_example_account_mapping.csv
Last Update Oct 12, 2021 4:09 PM by Dan Villan

Fact table and dimension table structure with sample data previewed at the bottom of the screen

Creating a query

2. Initiate query creation

Click the **plus (+) button** labeled **Create** in the top menu. From the dropdown, select **Query** to start building a new query.

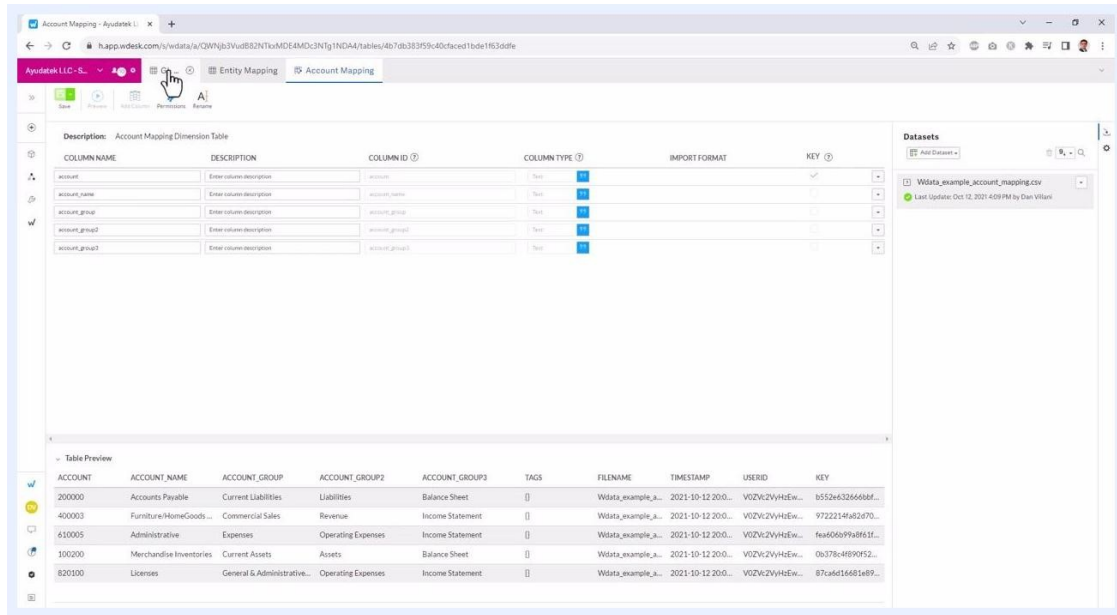


User clicking the plus button and selecting "Query" from the dropdown menu

3. Add table data as a source

In the new query window, locate the **Sources** panel on the left. Click **Add Source to Use** and select **Add table data** from the dropdown. You can also choose to add spreadsheet data or query data if needed.

Select the tables you want to use in your query. In this example, select the three tables: **GL Data**, **Account Mapping**, and **Entity Mapping**. Click **Add** to include them as sources. The selected tables now appear in the **Sources** panel on the left.

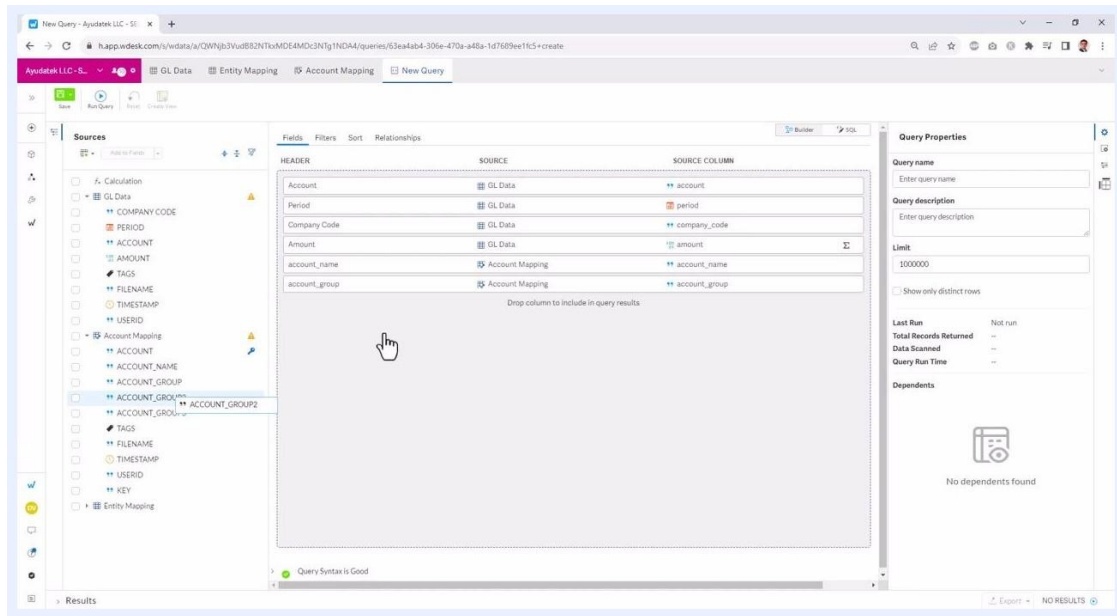


New query window with "Add table data" option highlighted in the Sources panel

4. Expand tables and add fields

Expand each table in the **Sources** panel to view its available columns. Drag and drop the columns you need into the query builder area in any order you prefer.

For example, drag in **Account**, **Period**, **Company Code**, and **Amount** from the **GL Data** table. You can also add fields from the dimension tables, such as **Account Name** and **Account Group** from **Account Mapping**.



Fields from multiple tables being dragged into the query builder area, showing **Account**, **Period**, **Company Code**, **Amount**, **Account Name**, and **Account Group**

5. Arrange and review selected fields

Ensure the fields are listed in the order you want in the query builder. The builder displays the source table and source column for each field. You can continue to add or rearrange fields as needed to match your reporting requirements.

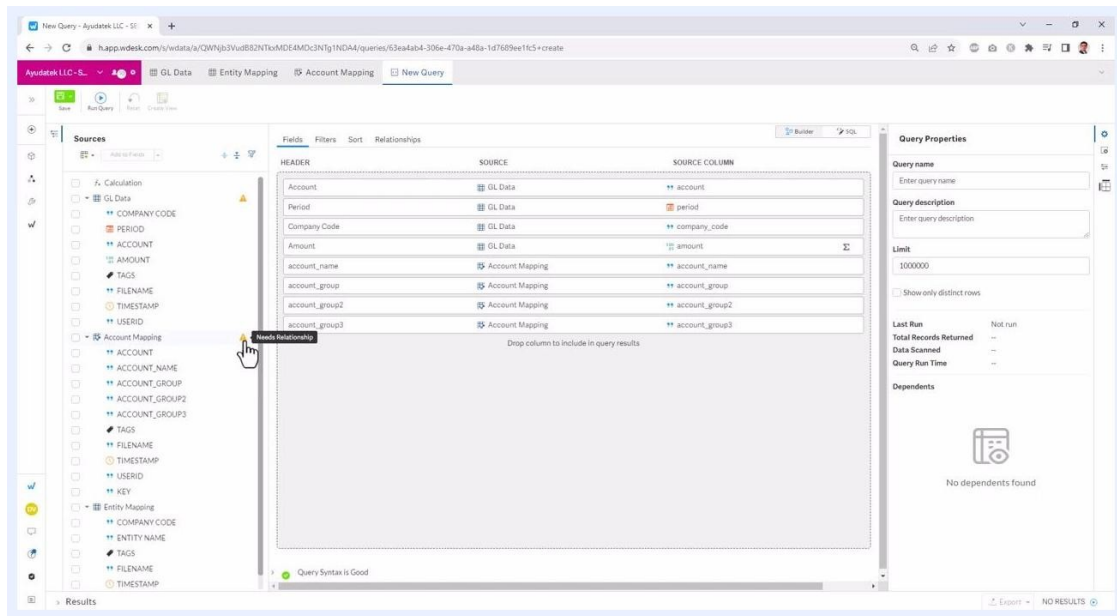
With these steps complete, you have a query that combines data from your fact and dimension tables, ready for you to define how the tables relate to one another.

Building relationships between tables

6. Understand when a join is needed

When your query includes fields from multiple tables, you must join those tables together to create a unified dataset. If you see a warning such as "Needs Relationship," it means a join is required between the tables involved.

Click the **Relationships** tab at the top of the query builder to define how your tables are joined.

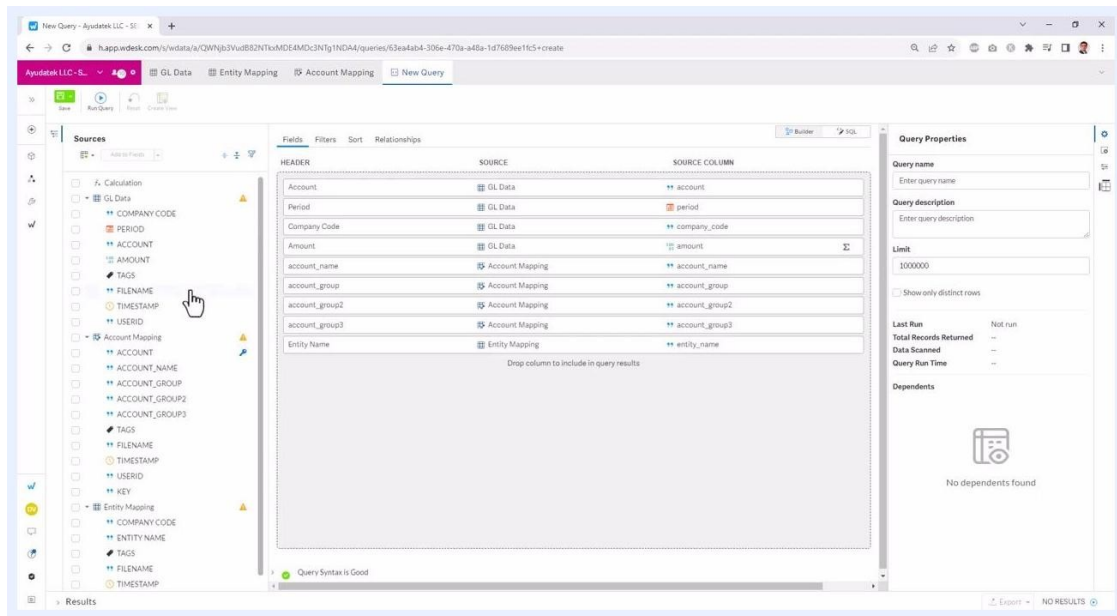


The query builder shows fields from multiple tables, with a warning icon and tooltip "Needs Relationship" next to the Account Mapping table in the Sources panel

7. Create the first join

Set up a join between the [GL Data](#) table and the [Entity Mapping](#) table. Select [company_code](#) from the [GL Data](#) table, choose the join type (for example, LEFT JOIN), and set the join condition to match [company_code](#) from [GL Data](#) to [company_code](#) from [Entity Mapping](#).

You can select the join type from options such as LEFT JOIN, RIGHT JOIN, INNER JOIN, or FULL JOIN.

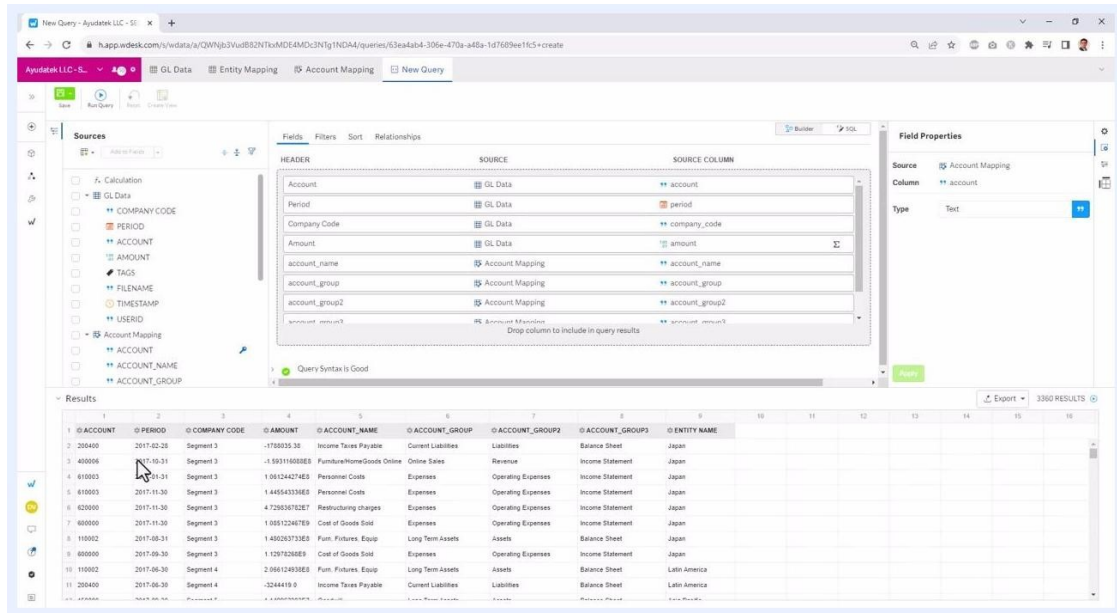


The Relationships tab is open, showing a LEFT JOIN between GL Data (company_code) and Entity Mapping (company_code), with join type options visible

8. Add additional joins as needed

For queries involving more than two tables, click **Add another join**. For the second join, select fields from the result of the first join (Join 1). Drag and drop the appropriate source field (for example, [account](#) from [GL Data](#)) and set it equal to the corresponding field in the [Account Mapping](#) table (for example, [account](#)).

Repeat this process for any additional tables you need to join.



The Relationships tab shows two joins: the first between GL Data and Entity Mapping on company_code, and the second join setup in progress, with the user selecting fields from Join 1

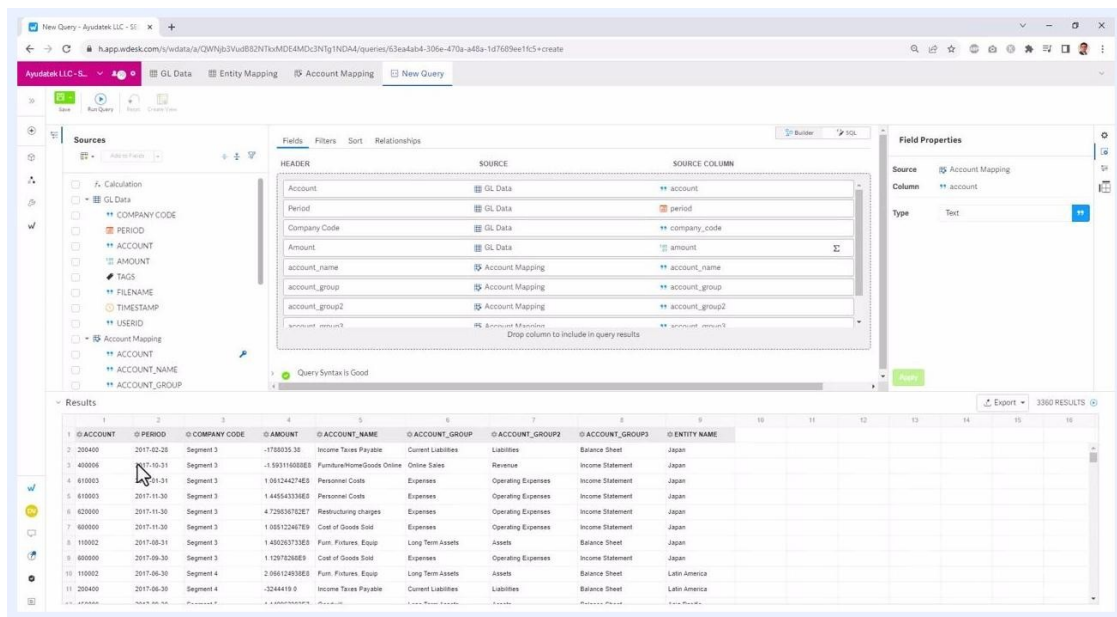
9. Verify your join configuration

Confirm that all necessary joins are defined so that every table is connected through the appropriate fields. The query builder displays "Query Syntax is Good" when all joins are valid.

10. Preview the query results

Return to the **Fields** tab to review your selected columns, then click **Run Query** to preview the data. The results grid at the bottom displays the combined data from all joined tables, showing columns such as Account, Period, Company Code, Amount, Account Name, Account Group, Account Group2, Account Group3, and Entity Name.

Review the preview to confirm that the data matches your expectations.



The query builder displays the selected fields and a preview of the query results, showing columns from all joined tables and sample data in the results grid

11. Iterate as needed

If the results are not what you expect, revisit your joins or selected fields and make adjustments. Periodically preview the data to confirm accuracy as you refine your query.

With these steps, you have joined multiple tables in Workiva and previewed the resulting dataset, ensuring your query returns the information you need for analysis and reporting.

Customizing the display of your query results

12. Reorder columns in the query output

Drag and drop columns in the **Fields** tab to change their order in the results grid. For example, to move **Account Name** immediately after **Account**, click and drag the `account_name` field below `account`. To move **Entity Name** after **Company Code**, drag the `entity_name` field to the desired position.

The order of columns in the **Fields** list determines their order in the results grid. After reordering, click **Run Query** to update the results and see the new column arrangement.

The screenshot shows the Apydesk LLC - New Query interface. The **Fields** tab is active, displaying a list of columns being reordered. The columns are: Account, account_name, Period, Company Code, Amount, account_group, account_group2, and account_group3. The **Results** grid below shows the data for the query, with columns ordered as: ACCOUNT, PERIOD, COMPANY CODE, AMOUNT, ACCOUNT_NAME, ACCOUNT_GROUP, ACCOUNT_GROUP2, ACCOUNT_GROUP3, and ENTITY NAME. The results grid contains 15 rows of data, including account information, periods, company codes, amounts, account names, account groups, and entity names.

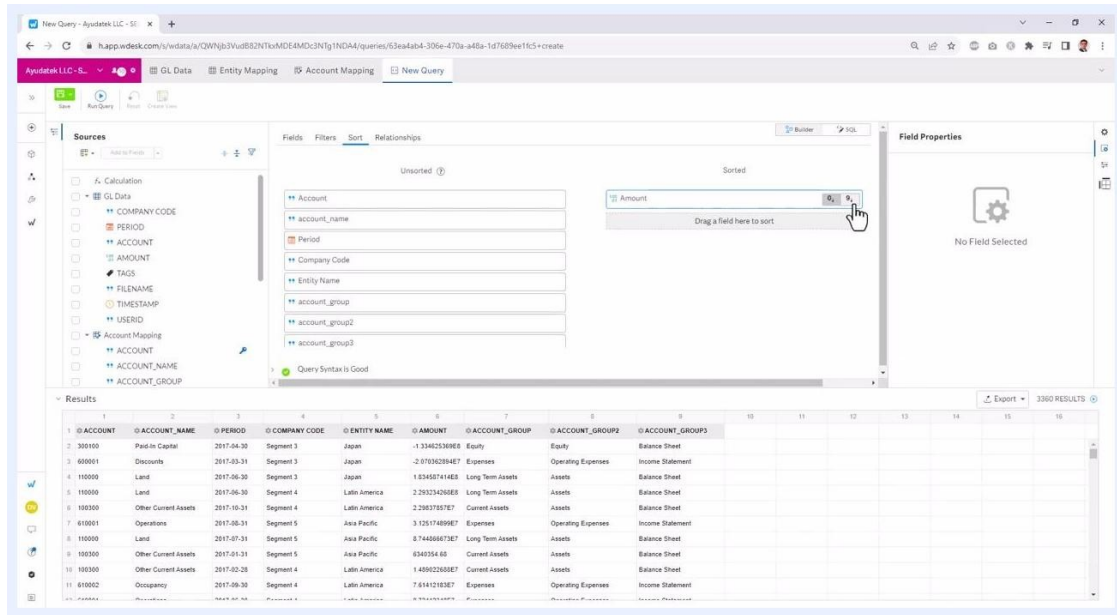
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
ACCOUNT	PERIOD	COMPANY CODE	AMOUNT	ACCOUNT_NAME	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3	ENTITY NAME						
200400	2017-02-28	Segment 3	-1788335.36	Income Taxes Payable	Current Liabilities	Liabilities	Balance Sheet	Japan						
400006	2017-10-31	Segment 3	-1.593116500E8	FurnitureHomeGoods Online	Online Sales	Revenue	Income Statement	Japan						
610003	2017-01-31	Segment 3	1.561244274E5	Personnel Costs	Expenses	Operating Expenses	Income Statement	Japan						
610003	2017-11-30	Segment 3	1.445433336E5	Personnel Costs	Expenses	Operating Expenses	Income Statement	Japan						
620000	2017-11-30	Segment 3	4.728536762E7	Restructuring charges	Expenses	Operating Expenses	Income Statement	Japan						
600000	2017-11-30	Segment 3	1.051224678E9	Cost of Goods Sold	Expenses	Operating Expenses	Income Statement	Japan						
110002	2017-09-30	Segment 3	1.486263733E9	Furn. Fixtures, Equip	Long Term Assets	Assets	Balance Sheet	Japan						
600000	2017-09-30	Segment 3	1.12676268E9	Cost of Goods Sold	Expenses	Operating Expenses	Income Statement	Japan						
110002	2017-06-30	Segment 4	2.066124938E9	Furn. Fixtures, Equip	Long Term Assets	Assets	Balance Sheet	Latin America						
200400	2017-06-30	Segment 4	-3244419.0	Income Taxes Payable	Current Liabilities	Liabilities	Balance Sheet	Latin America						

The Fields tab is open, showing columns being reordered by dragging account_name below Account, and entity_name after Company Code. The results grid below reflects the new column order.

13. Apply sorting to query results

Click the **Sort** tab to define how your results should be ordered. Drag a field (for example, **Amount**) from the list of available fields to the **Sorted** section.

Choose the sort direction by clicking the ascending (A→Z) or descending (Z→A) icon next to the field to toggle the order. For example, select descending order to show the largest amounts first. The results grid updates to reflect the new sorting after you run the query.

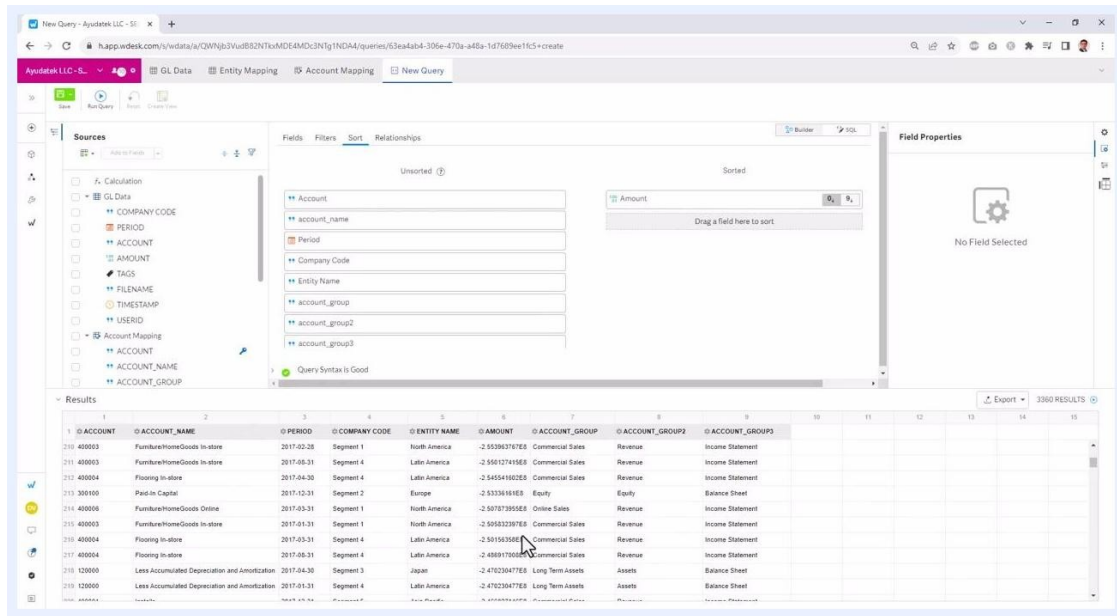


The Sort tab is open, with Amount dragged to the Sorted section and the descending order icon selected. The results grid below shows data sorted by Amount.

14. Add filters to limit query results

Click the **Filters** tab to add conditions that restrict which rows appear in your results. Drag a field (for example, **Account**) from the **Sources** panel to the filter area labeled "Drop column to filter query results by."

Set the filter condition (for example, "Equal To") and enter a value or use a parameter. To filter by a specific account, enter the account number in the value field.



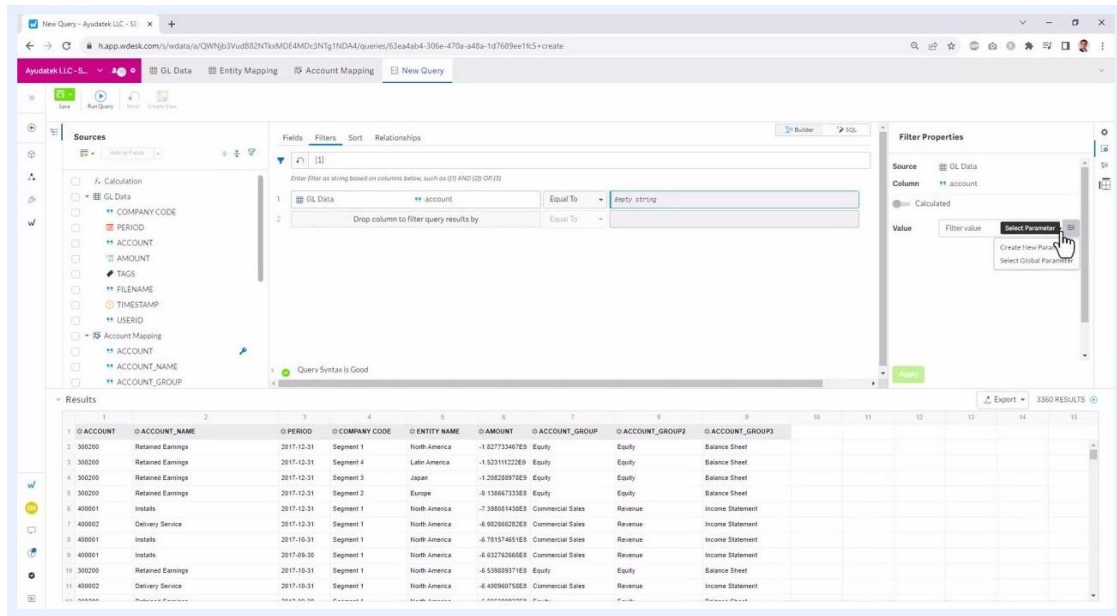
The Filters tab is open, with Account dragged into the filter area and the filter condition set to "Equal To". The value field is ready for input.

Using parameters for dynamic filtering

15. Select a parameter for your filter

In the **Filter Properties** panel on the right, you can choose to enter a static value or use a parameter for dynamic filtering. Click **Select Parameter** to use a parameter as a prompt. You can create a new parameter or select a global parameter.

Name your parameter (for example, "account prompt") to make it clear for users running the query. Parameters allow users to enter filter values each time they run the query, making the report interactive.



The Filter Properties panel is open, showing the option to Select Parameter for the filter value. The user is about to create or select a parameter for dynamic filtering.

16. Match the parameter's data type to the field

Ensure the data type of your parameter matches the field you intend to filter. In this example, the field being filtered is **account**, which is a text field. The parameter is named **Account Prompt** in the "Create New Parameter" panel, and the "Type" is set to **Text** to match the data type of the **account** field.

The screenshot shows the 'New Query' interface. On the right, the 'Parameters' panel is open, showing a 'Create New Parameter' dialog. The 'Name' field is 'Account Prompt' and the 'Type' is 'Text'. Below the 'Type' dropdown, there is a 'Default Value' field and a 'Pick List' button. The 'Fields' panel in the center shows a filter rule for the 'account' field, set to 'Equal To' with a value of 'empty string'. The 'Results' panel at the bottom displays a table with columns for account details and financial data.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUPS	ACCOUNT_GROUPS						
300200	Retained Earnings	2017-12-31	Segment 1	North America	-1.627733467E9	Equity	Equity	Balance Sheet						
300200	Retained Earnings	2017-12-31	Segment 4	Latin America	-1.523119222E9	Equity	Equity	Balance Sheet						
300200	Retained Earnings	2017-12-31	Segment 3	Japan	-1.208208970E9	Equity	Equity	Balance Sheet						
300200	Retained Earnings	2017-12-31	Segment 2	Europe	-9.138667133E8	Equity	Equity	Balance Sheet						
400001	Installs	2017-12-31	Segment 1	North America	-7.388091430E8	Commercial Sales	Revenue	Income Statement						
400002	Delivery Service	2017-12-31	Segment 1	North America	-6.98286232E8	Commercial Sales	Revenue	Income Statement						
400001	Installs	2017-10-31	Segment 1	North America	-6.791574851E8	Commercial Sales	Revenue	Income Statement						
400001	Installs	2017-09-30	Segment 1	North America	-6.63276260E8	Commercial Sales	Revenue	Income Statement						
300200	Retained Earnings	2017-10-31	Segment 1	North America	-6.539689371E8	Equity	Equity	Balance Sheet						
400002	Delivery Service	2017-10-31	Segment 1	North America	-6.400905755E8	Commercial Sales	Revenue	Income Statement						

Parameter creation panel open, "Account Prompt" entered as Name, "Text" selected as Type, cursor over type dropdown

17. Enable a pick list for predefined values

Enable the "Pick List" option if you want users to select from predefined values. Toggle the "Pick List" switch to ON. The "List Options" box appears, allowing you to enter valid account values. Enter each account value on a separate line (for example, 300200, 400001).

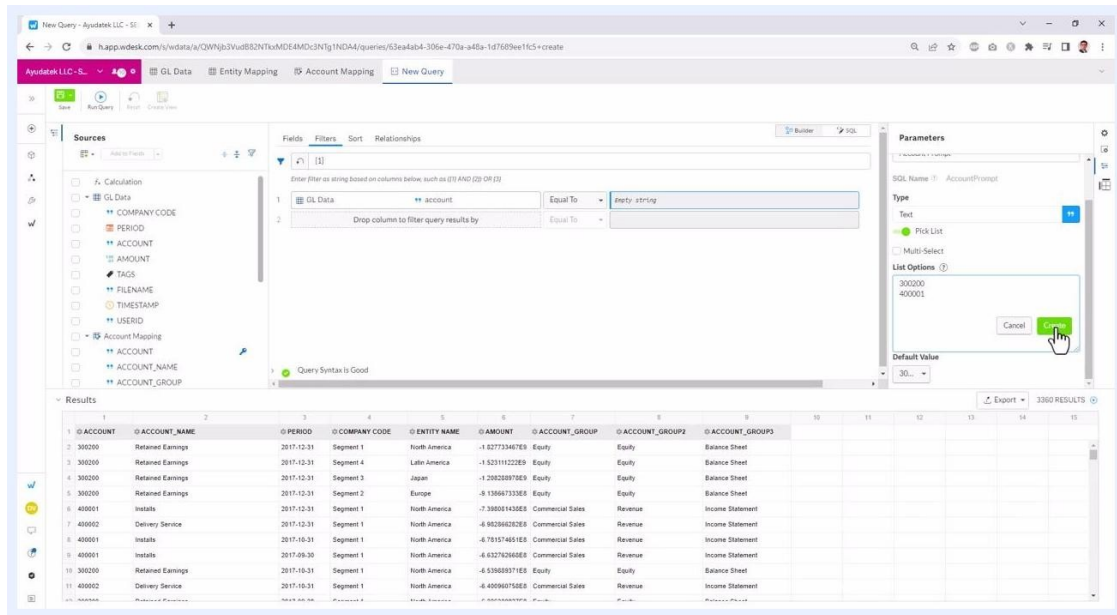
The screenshot shows the Apptek LLC - SI interface. The 'Parameters' panel on the right is open, showing the 'Type' dropdown set to 'Text'. The 'Pick List' checkbox is checked, and the 'List Options' box is visible, containing the values '300200' and '400001'. The 'Default Value' is set to '30...'. The 'Results' panel at the bottom displays a table with 15 columns: ACCOUNT, ACCOUNT_NAME, PERIOD, COMPANY CODE, ENTITY NAME, AMOUNT, ACCOUNT_GROUP, ACCOUNT_GROUPS, ACCOUNT_GROUPS, and 10 empty columns. The table contains 11 rows of data, including Retained Earnings, Delivery Service, and Installs.

ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUPS	ACCOUNT_GROUPS						
300200	Retained Earnings	2017-12-31	Segment 1	North America	-1.82773467E9	Equity	Equity	Balance Sheet						
300200	Retained Earnings	2017-12-31	Segment 4	Latin America	-1.523111222E9	Equity	Equity	Balance Sheet						
300200	Retained Earnings	2017-12-31	Segment 3	Japan	-1.208208970E9	Equity	Equity	Balance Sheet						
300200	Retained Earnings	2017-12-31	Segment 2	Europe	-8.136667333E8	Equity	Equity	Balance Sheet						
400001	Installs	2017-12-31	Segment 1	North America	-7.388081435E8	Commercial Sales	Revenue	Income Statement						
400002	Delivery Service	2017-12-31	Segment 1	North America	-6.98286832E8	Commercial Sales	Revenue	Income Statement						
400001	Installs	2017-10-31	Segment 1	North America	-6.781574851E8	Commercial Sales	Revenue	Income Statement						
400001	Installs	2017-09-30	Segment 1	North America	-6.63276260E8	Commercial Sales	Revenue	Income Statement						
300200	Retained Earnings	2017-10-31	Segment 1	North America	-6.538693937E8	Equity	Equity	Balance Sheet						
400002	Delivery Service	2017-10-31	Segment 1	North America	-6.400960755E8	Commercial Sales	Revenue	Income Statement						

Pick List enabled, two account values entered in List Options: 300200 and 400001

18. Create the parameter

Click the **Create** button to finalize the parameter. The parameter is now available for use in your query filter.



Cursor clicking the green "Create" button in the parameter panel, two account values in List Options

19. Apply the parameter to your query filter

In the filter section, set the **account** field to use the new parameter (**AccountPrompt**). The filter now uses the selected account value from the prompt, and the query results update to show only records matching the selected account (for example, **300200**).

The screenshot shows the Apudata LLC - S1 interface. The 'Filters' section is active, showing a filter for 'account' set to 'Account Prompt (default: '300200')'. The 'Results' section displays a table with 15 columns: ID, ACCOUNT, ACCOUNT_NAME, PERIOD, COMPANY CODE, ENTITY NAME, AMOUNT, ACCOUNT_GROUP, ACCOUNT_GROUP2, ACCOUNT_GROUP3, and 12 empty columns. The table contains 11 rows of data, all filtered for account 300200. The 'Running Query' button is visible at the bottom right.

ID	ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3					
1	300200	Retained Earnings	2017-12-31	Segment 1	North America	-1.82773467E9	Equity	Equity	Balance Sheet					
2	300200	Retained Earnings	2017-12-31	Segment 4	Latin America	-1.52311222E9	Equity	Equity	Balance Sheet					
3	300200	Retained Earnings	2017-12-31	Segment 3	Japan	-1.20620897E9	Equity	Equity	Balance Sheet					
4	300200	Retained Earnings	2017-12-31	Segment 2	Europe	-8.13866733E8	Equity	Equity	Balance Sheet					
5	400001	Installs	2017-12-31	Segment 1	North America	-7.39808143E8	Commercial Sales	Revenue	Income Statement					
6	400002	Delivery Service	2017-12-31	Segment 1	North America	-6.98206832E8	Commercial Sales	Revenue	Income Statement					
7	400001	Installs	2017-10-31	Segment 1	North America	-6.79157485E8	Commercial Sales	Revenue	Income Statement					
8	400001	Installs	2017-09-30	Segment 1	North America	-6.63276268E8	Commercial Sales	Revenue	Income Statement					
9	300200	Retained Earnings	2017-10-31	Segment 1	North America	-6.53989397E8	Equity	Equity	Balance Sheet					
10	400002	Delivery Service	2017-10-31	Segment 1	North America	-6.40096075E8	Commercial Sales	Revenue	Income Statement					
11	400002	Delivery Service	2017-10-31	Segment 1	North America	-6.40096075E8	Commercial Sales	Revenue	Income Statement					

Filter set to "account Equal To :Account Prompt (default: '300200')", results filtered to account 300200

20. Add additional filters as needed

Add a filter for the **period** field, for example. Enter a date value (such as **2023-10-04**) or use the calendar picker to select a date.

The screenshot shows the Apydata LLC query builder interface. The 'Filters' tab is active, and a filter for the 'period' field is added. The filter value is '2023-10-04', which was selected using a calendar picker. The 'Results' tab shows a table with columns: ACCOUNT, ACCOUNT_NAME, PERIOD, COMPANY CODE, ENTITY NAME, AMOUNT, ACCOUNT_GROUP, ACCOUNT_GROUP2, and ACCOUNT_GROUP3. The table contains 10 rows of data.

ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3
300200	Retained Earnings	2017-02-28	Segment 1	North America	-2.038910324E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-07-31	Segment 5	Asia Pacific	-1.954449678E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.876275545E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.843146472E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.835990211E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-04-30	Segment 2	Europe	-1.818917332E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.793320345E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.503423545E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.412360308E8	Equity	Equity	Balance Sheet
300200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.118097448E8	Equity	Equity	Balance Sheet

Second filter added for "period", value set to 2023-10-04 using calendar picker

21. Link the period filter to a parameter

Use the **Select Parameter** button to link the filter value to a parameter if desired. This allows dynamic filtering based on user input for the period as well.

The screenshot shows the Apydata LLC - S1 query builder interface. The 'Filter Properties' panel on the right is active, showing the 'period' column selected. The 'Value' field is set to '10/4/2023', and the 'Select Parameter' button is highlighted. A calendar picker is open, showing the month of October 2023. The main query editor shows a filter for 'period' with a value of '2023-10-04'. The 'Results' table at the bottom displays a list of financial data rows.

ID	ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUPS
52	300200	Retained Earnings	2017-02-28	Segment 1	North America	-2.03818324E5	Equity	Balance Sheet
53	300200	Retained Earnings	2017-07-31	Segment 5	Asia Pacific	-1.95444987E5	Equity	Balance Sheet
54	300200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.878275554E5	Equity	Balance Sheet
55	300200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.843146472E5	Equity	Balance Sheet
56	300200	Retained Earnings	2017-08-31	Segment 5	Asia Pacific	-1.83986201E5	Equity	Balance Sheet
57	300200	Retained Earnings	2017-06-30	Segment 2	Europe	-1.81891732E5	Equity	Balance Sheet
58	300200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.765302804E5	Equity	Balance Sheet
59	300200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.58520384E5	Equity	Balance Sheet
60	300200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.41236188E5	Equity	Balance Sheet
61	300200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.118887648E5	Equity	Balance Sheet

Cursor over "Select Parameter" button next to period value, calendar picker open

22. Create a parameter matching the period field's data type

In the "Create New Parameter" panel on the right, enter **PeriodPrompt** as the Name. Set the "Type" to **Date** to match the **period** field, which expects date values. The "Type" dropdown shows options including Text, Integer, Decimal, Boolean, Timestamp, and Date. Do not enter a default value at this stage.

The screenshot shows a web application interface for creating a new parameter. The 'Parameters' panel on the right is open, showing a form with the following fields:

- Name:** PeriodPrompt
- SQL Name:** PeriodPrompt
- Type:** Date (highlighted in the dropdown menu)
- Default Value:** (empty)

The background shows a query editor with a table of financial data. The table has columns for ACCOUNT, ACCOUNT_NAME, PERIOD, COMPANY CODE, ENTITY NAME, AMOUNT, ACCOUNT_GROUP, ACCOUNT_GROUP2, and ACCOUNT_GROUP3. The data is filtered by the query [1]AND[2].

Parameter creation panel open, "PeriodPrompt" entered as Name, "Type" dropdown visible with Date option highlighted, no default value entered

23. Review the parameter applied to the filter

After setting the type to Date, the parameter becomes available for use in the filter. In the filter section, the **period** field is set to use the new parameter (**PeriodPrompt**), which currently has a default value of Blank. A tooltip appears showing "PeriodPrompt, Default Value: Blank".

The screenshot shows the Apurtek LLC - S1 query editor. The 'Filter' section is active, showing a filter for the 'period' field. The filter is set to 'PeriodPrompt (default: Blank)'. A tooltip is visible over the 'PeriodPrompt' field, showing 'PeriodPrompt, Default Value: Blank'. The 'Filter Properties' panel on the right shows the 'Source' as 'GL Data', the 'Column' as 'period', and the 'Value' as 'PeriodPrompt'. The 'Results' table at the bottom shows 60 results, with columns for ACCOUNT, ACCOUNT_NAME, PERIOD, COMPANY CODE, ENTITY NAME, AMOUNT, ACCOUNT_GROUP, ACCOUNT_GROUP2, and ACCOUNT_GROUP3.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3							
300200	Retained Earnings	2017-02-28	Segment 1	North America	-2.038919324E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.954409870E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.878270540E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.840146470E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.838863010E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-04-30	Segment 2	Europe	-1.818817832E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.783262840E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.503422540E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.412306300E8	Equity	Equity	Balance Sheet							
300200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.118897440E8	Equity	Equity	Balance Sheet							

Filter for period set to ":PeriodPrompt (default: Blank)", tooltip visible, parameter type set to Date

24. Review how filters are combined

The filter logic at the top shows (1) AND (2), indicating both filters (account and period) are active. You can click on the filter logic to modify how filters are combined (for example, AND or OR). The filter for **account** uses **:Account Prompt** (default: '302200'), and the filter for **period** uses **:PeriodPrompt** (default: Blank).

The screenshot displays the Apudata LLC - S1 interface. The top navigation bar includes 'New Query', 'GL Data', 'Entity Mapping', 'Account Mapping', and 'New Query'. The main workspace is divided into several panels:

- Sources:** A list of data sources including 'GL Data', 'COMPANY CODE', 'PERIOD', 'ACCOUNT', 'TAGS', 'FILENAME', 'TIMESTAMP', 'USERID', 'Account Mapping', 'ACCOUNT', 'ACCOUNT_NAME', and 'ACCOUNT_GROUP'.
- Fields:** A section for defining fields, currently showing 'GL Data' and 'period'.
- Filters:** A section for defining filters, currently showing 'GL Data' and 'period'.
- Filter Properties:** A panel on the right showing the properties for the selected filter, including 'Source', 'Column', and 'Value'.

The filter logic at the top shows '(1) AND (2)', indicating both filters (account and period) are active. The filter for **account** uses **:Account Prompt** (default: '302200'), and the filter for **period** uses **:PeriodPrompt** (default: Blank).

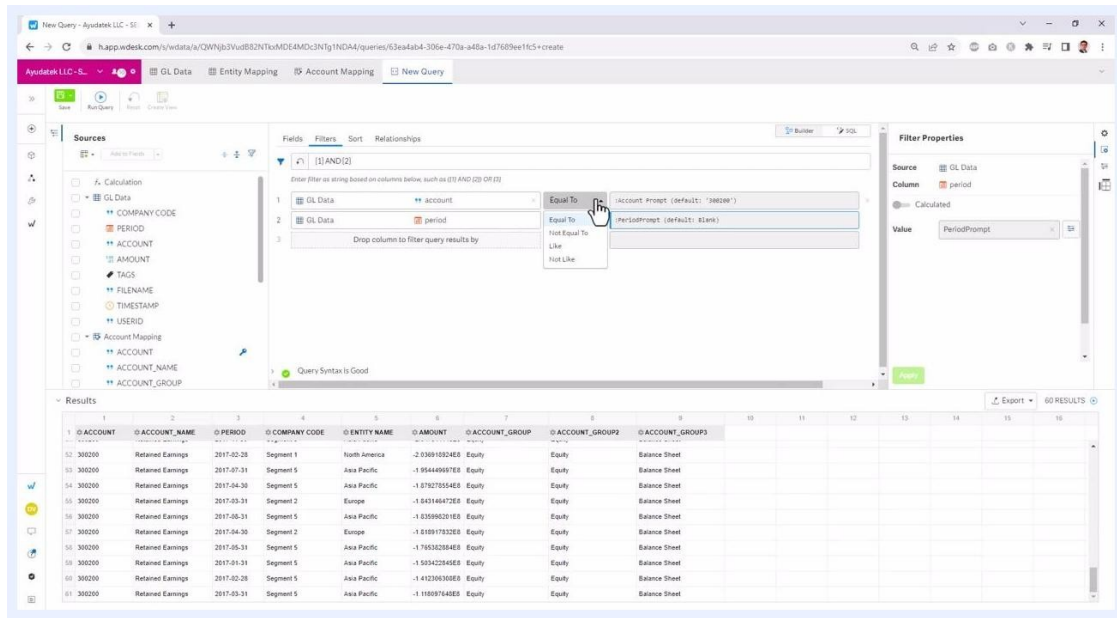
The results table below shows the following data:

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
ID ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3							
302200	Retained Earnings	2017-02-28	Segment 1	North America	-2.936918324E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-07-31	Segment 5	Asia Pacific	-1.954486878E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.876275545E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.843146473E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-05-31	Segment 2	Asia Pacific	-1.835896201E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-04-30	Segment 2	Europe	-1.818917323E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.795326384E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.503422545E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.412396306E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.110087448E8	Equity	Equity	Balance Sheet							

Filter logic "(1) AND (2)" highlighted, both filters using parameters, cursor over filter logic

25. Select a filter operator

Click the operator dropdown (default is "Equal To") to choose from options: Equal To, Not Equal To, Like, Not Like. This allows you to customize how the filter matches values.



Operator dropdown open, options visible: Equal To, Not Equal To, Like, Not Like, cursor selecting operator

26. Correct invalid filter logic

The system automatically validates your filter logic. If you enter an invalid operator (for example, typing "PLUS" instead of "AND" or "OR"), an error message appears: "Invalid filter. Ensure all open parentheses are closed, and use only AND or OR to combine filters." The filter logic at the top updates to reflect the invalid entry (for example, "(1) PLUS (2)").

The screenshot shows the 'New Query' interface for 'Apptek LLC'. The 'Filters' tab is active, displaying a filter logic tree. The first filter is 'GL Data' with 'account' set to 'Equal To' and 'Account Prompt (default: "380200")'. The second filter is 'GL Data' with 'period' set to 'Equal To' and 'Period Prompt (default: "1/1/2020")'. The filter logic at the top is '(1) PLUS (2)'. A red error message is displayed: 'Invalid filter. Ensure all open parentheses are closed, and use only AND or OR to combine filters.' The 'Filter Properties' panel on the right shows the source as 'GL Data', column as 'period', and value as 'Period Prompt (default: "1/1/2020")'. The 'Results' panel at the bottom shows a table with 16 columns: ACCOUNT, ACCOUNT_NAME, PERIOD, COMPANY CODE, ENTITY NAME, AMOUNT, ACCOUNT_GROUP, ACCOUNT_GROUP2, ACCOUNT_GROUP3, and 7 empty columns. The table contains 16 rows of data.

ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3							
380200	Retained Earnings	2017-02-28	Segment 1	North America	-2.938919324E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-07-31	Segment 5	Asia Pacific	-1.954498978E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.878279554E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.843146473E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-05-31	Segment 2	Asia Pacific	-1.838862018E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-04-30	Segment 2	Europe	-1.818917323E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.795320384E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.563422545E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.412336308E8	Equity	Equity	Balance Sheet							
380200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.110087448E8	Equity	Equity	Balance Sheet							

Invalid filter logic "(1) PLUS (2)", error message in red, filters for account and period using parameters

Change the filter logic back to a valid operator, such as "AND." The error message disappears, and the query syntax validates as good.

The screenshot shows a web-based query builder interface. The top navigation bar includes tabs for 'GL Data', 'Entity Mapping', 'Account Mapping', and 'New Query'. The 'New Query' tab is active. On the left, a 'Sources' panel lists various data sources like 'GL Data', 'COMPANY CODE', 'PERIOD', 'ACCOUNT', 'AMOUNT', 'TAGS', 'FILENAME', 'TIMESTAMP', 'USERID', 'Account Mapping', 'ACCOUNT', 'ACCOUNT_NAME', and 'ACCOUNT_GROUP'. The main workspace is divided into 'Fields', 'Filters', 'Sort', and 'Relationships' sections. The 'Filters' section shows a filter logic: '1. GL Data account Equal To <account_prompt (default: '300000')>' and '2. GL Data period Equal To <periodprompt (default: \$12m)>'. The filter logic is corrected to '(1) AND (2)'. A green status bar at the bottom of the workspace indicates 'Query Syntax Is Good'. On the right, a 'Filter Properties' panel shows the 'Source' as 'GL Data', the 'Column' as 'period', and the 'Value' as 'PeriodPrompt'. Below the workspace, a 'Results' section displays a table with 16 columns: 'ACCOUNT', 'ACCOUNT_NAME', 'PERIOD', 'COMPANY CODE', 'ENTITY NAME', 'AMOUNT', 'ACCOUNT_GROUP', 'ACCOUNT_GROUP2', 'ACCOUNT_GROUP3', and 7 empty columns. The table contains 10 rows of data, including columns for 'ACCOUNT', 'ACCOUNT_NAME', 'PERIOD', 'COMPANY CODE', 'ENTITY NAME', 'AMOUNT', 'ACCOUNT_GROUP', 'ACCOUNT_GROUP2', and 'ACCOUNT_GROUP3'. The first row shows '300200', 'Retained Earnings', '2017-02-28', 'Segment 1', 'North America', '-2,938,193,248', 'Equity', 'Equity', and 'Balance Sheet'. The last row shows '300200', 'Retained Earnings', '2017-03-31', 'Segment 5', 'Asia Pacific', '-1,180,874,608', 'Equity', 'Equity', and 'Balance Sheet'. The bottom right corner of the results section shows 'Export' and '60 RESULTS'.

Filter logic corrected to "(1) AND (2)", error message gone, filters using parameters

27. Remove filters for clarity

To simplify the view, remove one of the filters (for example, the period filter) by clicking the "X" next to it. This leaves only the account filter active, making it easier to visualize the effect of a single filter.

The screenshot shows the AyaData LLC query builder interface. The 'Filters' tab is active, displaying a list of filters. The 'period' filter is highlighted with a red 'X' next to it, indicating it is being removed. The 'account' filter remains active. The 'Filter Properties' panel on the right shows the 'period' filter's properties, with the 'Value' field set to 'PeriodPrompt (default: \$1m)'. The 'Results' section at the bottom displays a table with columns for account, account name, period, company code, entity name, amount, account group, and account group 2. The table contains 10 rows of data, including columns for account, account name, period, company code, entity name, amount, account group, and account group 2.

ID	ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3
52	300200	Retained Earnings	2017-02-28	Segment 1	North America	-2.03810324E5	Equity	Equity	Balance Sheet
53	300200	Retained Earnings	2017-07-31	Segment 5	Asia Pacific	-1.95444987E5	Equity	Equity	Balance Sheet
54	300200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.878270554E5	Equity	Equity	Balance Sheet
55	300200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.843146472E5	Equity	Equity	Balance Sheet
56	300200	Retained Earnings	2017-06-30	Segment 5	Asia Pacific	-1.83996201E5	Equity	Equity	Balance Sheet
57	300200	Retained Earnings	2017-06-30	Segment 2	Europe	-1.81891732E5	Equity	Equity	Balance Sheet
58	300200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.76530209E5	Equity	Equity	Balance Sheet
59	300200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.58320389E5	Equity	Equity	Balance Sheet
60	300200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.41239108E5	Equity	Equity	Balance Sheet
61	300200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.11088764E5	Equity	Equity	Balance Sheet

Only account filter remains, period filter removed, filter logic updated, query syntax good

28. Save and run the query after filter changes

After removing the period filter, ensure your query is updated. Click the **Save** button (green, top left) to save your changes. The filter section now shows only the account filter: **GL Data > account** Equal To **:Account Prompt (default: '302200')**. Confirm that the "Query Syntax is Good" message appears, and that the results table below reflects the current filter.

The screenshot shows the query builder interface for 'New Query - AyudaDesk LLC - SE'. The 'Sources' panel on the left lists various data sources, including 'GL Data'. The 'Fields' panel on the right shows the selected filter: 'GL Data > account' Equal To ':Account Prompt (default: '302200')'. The 'Results' table at the bottom displays 60 results, with columns for account, account name, period, company code, entity name, amount, account group, and account group 3. The 'Save' button is highlighted in the top left corner.

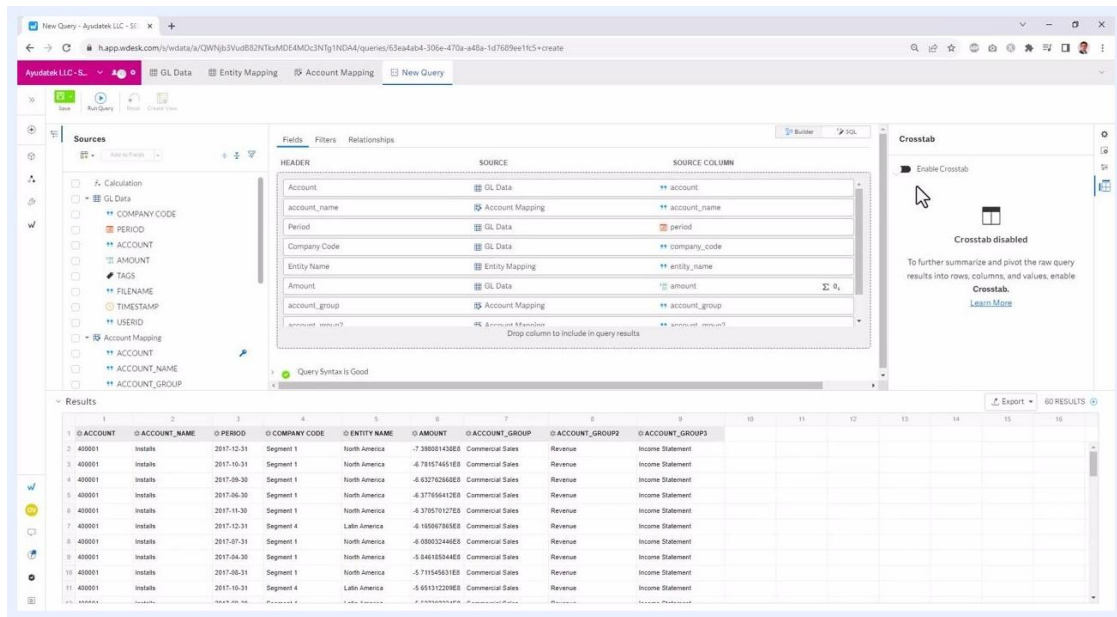
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
ACCOUNT	ACCOUNT_NAME	PERIOD	COMPANY CODE	ENTITY NAME	AMOUNT	ACCOUNT_GROUP	ACCOUNT_GROUP2	ACCOUNT_GROUP3							
302200	Retained Earnings	2017-02-28	Segment 1	North America	-2.036918324E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-07-31	Segment 5	Asia Pacific	-1.954449807E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-04-30	Segment 5	Asia Pacific	-1.878275545E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-03-31	Segment 2	Europe	-1.847464732E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-05-31	Segment 2	Asia Pacific	-1.838860201E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-04-30	Segment 2	Europe	-1.818917332E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-05-31	Segment 5	Asia Pacific	-1.795320384E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-01-31	Segment 5	Asia Pacific	-1.503422545E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-02-28	Segment 5	Asia Pacific	-1.412336308E8	Equity	Equity	Balance Sheet							
302200	Retained Earnings	2017-03-31	Segment 5	Asia Pacific	-1.110087408E8	Equity	Equity	Balance Sheet							

Query builder with only account filter active, Save button highlighted, results table updated

Configuring Crosstab for pivoted reporting

29. Access the Crosstab feature

Locate the **Crosstab** panel on the right side of the screen and click the Crosstab icon (grid/table symbol) to open the Crosstab configuration. The panel displays "Crosstab disabled" with an option to enable it, along with the description: "To further summarize and pivot the raw query results into rows, columns, and values, enable Crosstab."



Crosstab panel open, "Crosstab disabled" message, option to enable, cursor over Crosstab icon

30. Enable Crosstab and configure pivot fields

Toggle the **Enable Crosstab** switch to activate the feature. The Crosstab panel now allows you to assign fields to Rows, Columns, and Values. Drag and drop or select fields for each section:

- **Rows:** Account, account_name, Period, account_group, account_group2, account_group3
- **Columns:** Entity Name, Company Code
- **Values:** Amount (default aggregation: SUM)

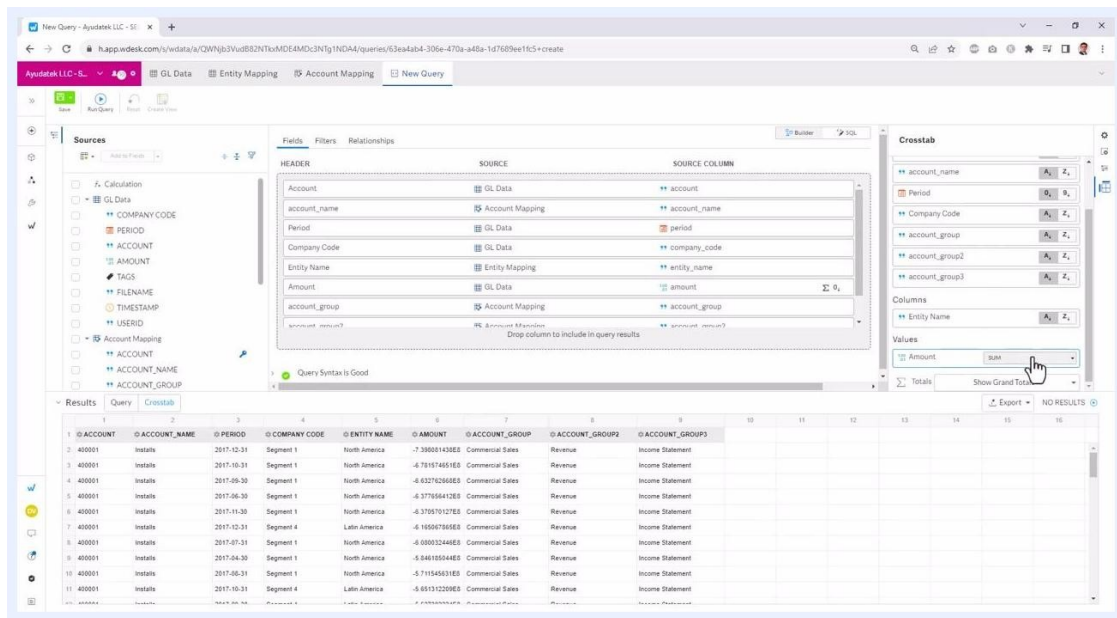
The main query builder area updates to show the new Crosstab configuration.

The screenshot displays the query builder interface for a new query. The 'Sources' panel on the left lists various data sources including GL Data, Account Mapping, and Entity Mapping. The main area shows a table with columns for Account, account_name, Period, and various account groups. The 'Crosstab' panel on the right is configured with 'Account' as the primary row, 'account_name' as the secondary row, and 'Period' as the column. The 'Columns' section lists 'Entity Name' and 'Company Code'. The 'Results' panel at the bottom shows a table with 12 columns and 11 rows of data, including account names, periods, and amounts.

Crosstab enabled, fields assigned to Rows (Account, account_name, Period, etc.), Columns (Entity Name, Company Code), Values (Amount as SUM)

31. Choose an aggregation operator for values

In the Crosstab panel, under **Values**, select the aggregation operator for the Amount field. Available options include SUM, COUNT, DISTINCT COUNT, MIN, MAX, and more. For this example, ensure **SUM** is selected for Amount.



Crosstab panel with Amount field in Values, aggregation operator dropdown open, SUM selected

You can add more fields to the Rows or Columns sections by dragging them from the list. For example, add Company Code to Columns to further break down the data. The Crosstab configuration updates dynamically as you add or remove fields.

32. Run the Crosstab query and view results

Once your Crosstab configuration is set, the query runs automatically, or you may need to click **Run Query**. The Results section now displays a pivoted table: rows are grouped by Account, account_name, Period, account_group, account_group2, and account_group3; columns represent combinations of Entity Name and Company Code; and each cell shows the SUM of Amount for the corresponding row/column intersection.

Confirm that the "Query Syntax is Good" message remains.

The screenshot displays the Ayoitask LLC - S1 interface. The top navigation bar includes tabs for GL Data, Entity Mapping, Account Mapping, and New Query. The main workspace is divided into several panels:

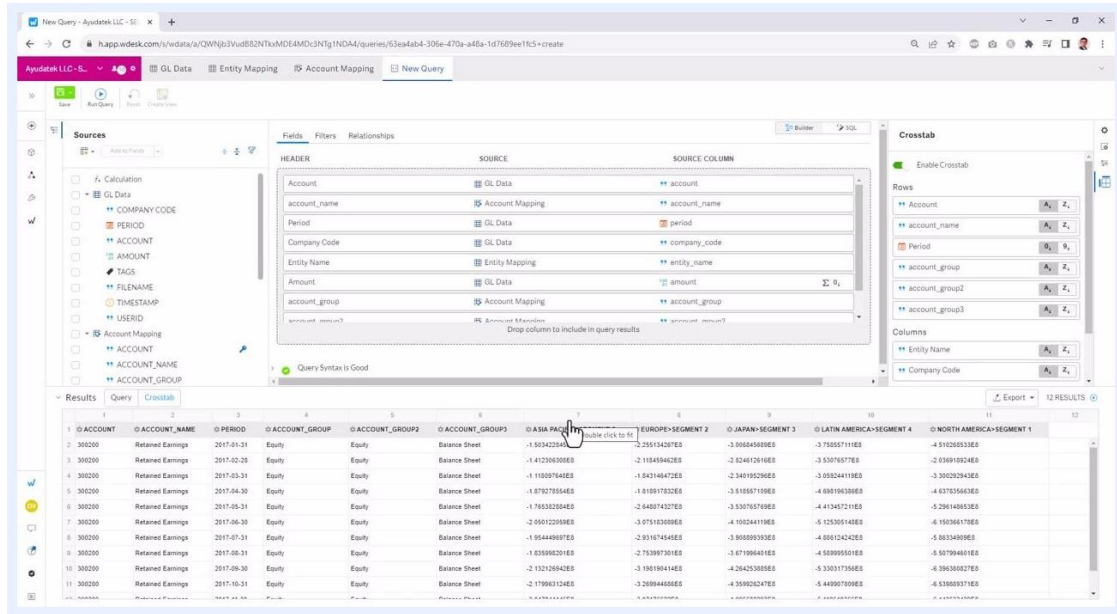
- Sources:** A list of data sources including GL Data, COMPANY CODE, ACCOUNT, AMOUNT, TAGS, FILENAME, TIMESTAMP, USERID, ACCOUNT MAPPING, ACCOUNT, and ACCOUNT GROUP.
- Fields, Filters, Relationships:** A central area for building the query. It shows a table with columns for SOURCE and SOURCE COLUMN. The table includes fields like Account, account_name, Period, Company Code, Entity Name, Amount, and account_group, each mapped to a specific source.
- Crosstab:** A panel on the right that allows enabling the crosstab feature. It shows a list of rows (Account, account_name, Period, account_group, account_group2, account_group3) and columns (Entity Name, Company Code).
- Results:** A table at the bottom showing the query results. The table has 12 columns: ACCOUNT, ACCOUNT_NAME, PERIOD, ACCOUNT_GROUP, ACCOUNT_GROUP2, ACCOUNT_GROUP3, ASIA PACIFIC-SEGMENT 5, EUROPE-SEGMENT 2, JAPAN-SEGMENT 3, LATIN AMERICA-SEGMENT 4, and NORTH AMERICA-SEGMENT 1. The results are grouped by account details and entity name, showing the SUM of Amount.

A green status bar at the bottom of the query builder indicates "Query Syntax is Good".

Crosstab results table with rows grouped by account details and columns by entity name and company code, showing SUM of Amount

33. Adjust column widths and explore results

You can double-click column headers (for example, "ASIA PACIFIC-SEGMENT 5") to auto-fit the width for better readability. Scroll horizontally to view all pivoted columns. The Crosstab tab in the Results section is active, showing the transformed data.



The screenshot shows the Happa query builder interface. The 'Sources' panel on the left lists various data sources like 'GL Data', 'Entity Mapping', and 'Account Mapping'. The 'Fields/Filters/Relationships' panel in the center shows the query structure with columns like 'Account', 'Account Name', 'Period', 'Company Code', 'Entity Name', 'Amount', and 'Account Group'. The 'Crosstab' panel on the right shows the configuration for the query, including the 'Enable Crosstab' checkbox and the 'Rows' and 'Columns' sections. The main area displays a table with columns for 'ACCOUNT', 'ACCOUNT_NAME', 'PERIOD', 'ACCOUNT_GROUP', and various entity/segment columns. A cursor is hovering over the 'ASIA PACIFIC-SEGMENT 5' column header. The table shows data for various accounts and periods, with values for different segments and entities.

Crosstab results with wide columns, cursor over column header, multiple entity/segment columns visible

With Crosstab enabled and configured, you can summarize and analyze your data by multiple dimensions, choosing which fields appear as rows, columns, and aggregated values for flexible, dynamic reporting directly within your query builder.

Exporting Crosstab results

34. Export your Crosstab results

To export the results, click the **Export** button located above the results table. Choose your preferred export format from the dropdown menu:

- To CSV
- To Excel
- Print
- To Spreadsheet
- Wdata Table

Click the desired option to download or send the results as needed.

The screenshot shows the Workiva query builder interface for a query named 'Ayuda LLC - S...'. The interface is divided into several panels: 'Sources' on the left, 'Fields/Filters/Relationships' in the center, 'Crosstab' on the right, and 'Results' at the bottom. The 'Results' panel displays a table with 12 columns and 11 rows of data. The columns are labeled: 1 ACCOUNT, 2 ACCOUNT_NAME, 3 PERIOD, 4 ACCOUNT_GROUP, 5 ACCOUNT_GROUP2, 6 ACCOUNT_GROUP3, 7 ANA PACIFIC-SEGMENT 5, 8 EUROPE-SEGMENT 2, 9 JAPAN-SEGMENT 3, 10 LATIN AMERICA-SEGMENT 4, 11 NORTH AMERICA, and 12 RESULTS. The 'Export' dropdown menu is open over the 'Results' panel, showing options: 'To CSV', 'To Excel', 'Print', 'To Spreadsheet', and 'Wdata Table'. A cursor is hovering over the 'Wdata Table' option.

Export dropdown open with options: To CSV, To Excel, Print, To Spreadsheet, Wdata Table; cursor over Export button

What's next

Now that you know how to create a Wdata query in Workiva, you can apply these same steps to build queries against your own fact and dimension tables. Use relationships to join tables, parameters and filters to make your queries interactive, and Crosstab to pivot your results for summarized reporting before exporting to the format that fits your workflow.