Add Department Reports Worklets

Business Process Overview

Users can add the **Department Reports** and **Department Reference Reports** Worklets to their homepage applications for quick access to tasks, reports and information associated with their assigned organizations.

- Use the **Department Reports** to view transactional data and review account activity.
- Use the **Department Reference Reports** to find **Cost Centers** and view available Worktags by department.

What are Worklets?

In Workday, each user homepage contains a variety of circular icons called Worklets. Worklets provide quick access to tasks, reports and information used on a regular basis. Users can have a maximum of 20 required and optional Worklets on their homepage. **Required Worklets** auto-populate based on the user's assigned roles. Users can add or remove **Optional Worklets** at their discretion.

Tasks

- Add **Department Reports** and **Department Reference Reports** Worklets
- How to Use the Worklets

Initiator Role

- Employee as Self

Prerequisites

- N/A

Policy Reference Material

- N/A

Add Department Reports Worklets

Steps – Add Department Reports and Department Reference Reports Worklets

1. Starting on the homepage, in the section with the user's name, click the gear icon called **Configure Applications**.

2. The **Configure Worklets** page displays. The page is divided into two sections:

   - **Required Worklets** auto-populate based on the user's assigned Workday roles.
   - **Optional Worklets** can be added or removed based on the user's needs.

3. To add Worklets, go to the **Optional Worklets** area and click the **+** icon in the upper-left column of the grid.

4. A **Worklet** line with a drop-down menu appears.

5. Click the blank line to add a **Worklet**.

6. In the **Search** field, type **Department Reports** and click **Enter**.

7. From the **Search Results,** select the **Department Reports** option.

8. Once again, click the **+** icon in the upper-left column of the grid to add another line.

9. In the **Search** field, type **Department Reference Reports** and click **Enter**.

10. From the **Search Results,** select the **Department Reference Reports** option.

11. Once you select both reports, click **OK**.

12. The **Optional Worklets** section lists the two report types.

13. Click **Done**.

14. Your homepage will list **Department Reports** and **Department Reference Reports** under the **Applications** menu.

Steps – How to Use the Worklets

1. From the homepage, click the **Department Reports** Worklet.

2. The list of available **Department Reports** displays.

3. Report names are hyperlinked. To open a report, click the appropriate hyperlink.

   Note: The discussion icon on the left of each report contains a brief description of each report.

Follow-up Actions

- N/A

Result

- N/A

Next Steps

- N/A