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.
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Follow-up Actions
- N/A

Result
- N/A

Next Steps
- N/A