

Calculated Fields Report Standard Checklist

Purpose

This checklist is intended to support Report Administrators to ensure the Calculated Fields are created following the [Calculated Fields Standard](#). It may be used at the time of development of the report in a lower environment, as well as a validation checklist prior to migrating the report to the production environment.

Calculated Field Name

Naming convention for all calculate fields:

<Calculation Scope Code> – <Calculation Function Code> – <Calculated Field Name>

Field Name zCF - ESI - Inventory Owning Academic Unit for Course

Business Object Student Course Registration Record

Calculation Additional Info Where Used

Extract Single Instance

For new calculated field that doesn't already exist and is needed for integration, only the integration team should use the following name:

CFINT_SRC.TGT.xxx - <Calculation Function Code> - <Calculated Field Name>

- Exception: For integration calculated fields where the above standard is not applicable, use: *CFINT_<Integration_ID_Identifier>*

(e.g. CFINT_BRG.006_BasicLifePostNRDEligible)

Calculation Scope Code

Calculation scope refers to the classification of consumable calculated fields available in Workday. Below is a table of accepted values, codes and their descriptions.

Calculation Scope Accepted Code Value	Calculated Scope Accepted Value Name	Description
zCF	System-Wide Calculated Field	This is a calculated field that will be made available on a Business Object for end-users to leverage.
RCF	Report-Specific Calculated Field	This is a calculated field that will be put into a single report used as part of a filter criteria or other report function ONLY if the calculation will not be leveraged outside of the report. Otherwise use zCF.
CFINT_SRC.TGT.xxx ¹	Integration Calculated Field	This is a calculated field that is used for integrations.

¹ xxx = 3 digits

Calculation Function Code

The following table lists acceptable values for calculation functions along with the respective code to be used in the calculated field name. For each function type description check [Calculated Fields Standard](#) under Function Code.

Calculation Function Type	Calculation Function Type	Accepted Name Value
Change Data Format	CT	Concatenate Text
	CC	Convert Currency
	CTN	Convert Text to Number
	FD	Format Date
	FN	Format Number
	FT	Format Text
Configure Constant Values	BD	Build Date
	DC	Date Constant

	NC	Numeric Constant
	PV	Prompt for Value
	TC	Text Constant
Retrieve Data	ARI	Aggregate Related Instances
	EE	Evaluate Expression
	EEB	Evaluate Expression Band
	EMI	Extract Multi-Instance
	ESI	Extract Single Instance
	LDR	Lookup Date Rollup
	LFP	Lookup Field with Prompts
	LH	Lookup Hierarchy
	LHR	Lookup Hierarchy Rollup
	LO	Lookup Organization
	LOR	Lookup Organizational Roles
	LRB	Lookup Range Band
	LRV	Lookup Related Value
	LTV	Lookup Translated Value
	LVA	Lookup Value as of Date
	ST	Substring Text
	TF	True/False Condition
Simple Calculations	AC	Arithmetic Calculation
	CRI	Count Related Instances
	DD	Date Difference
	IDD	Increment or Decrement Date
	SRI	Sum Related Instances
	TL	Text Length

Field Name

The field name refers to the calculated fields name that is descriptive enough to provide all the information related to that fields. Some examples as follows:

Correct Field Name	Incorrect Field Name
Active, On Leave or terminated Status	Status
Active, Unpaid Leaved, Paid Leave or Terminated Status	Status
Total Regular Salary	Total Salary
Total Based Pay	Total Salary
Union Member	Member
Academic Unit of the Program of Study as of the Course Registration	Academic Unit of the Program of Study

Academic Unit of the Program of Study as of the Report Run Date	Academic Unit of the Program of Study
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Business Object

Business Object refers to objects used to store data in Workday (such as organizations or workers). A business object has fields and instances and Workday links related business objects (i.e. a worker is associated with a position).

Calculation Description

The calculation description should be descriptive enough that someone with little knowledge of the field could get a general understanding of its use.

< Description> - <Team name>

Field Name zCF - ESI - Inventory Owning Academic Unit for Course

Business Object Student Course Registration Record

Calculation	Additional Info	Where Used
Description	Academic Unit who owns the Course Inventory - Onboard Reports	
Category	Worktags - Student	
Authorized Usage	Default Areas	

*Team Name list:



- Onboard Reports
- Offboard Reports
- Integration
- EDG Reporting
- WD Consultants
- ISC HR/FIN
- EDBI Sustainment
- LFS Onboard Reports
- Data conversion

Calculation Category

Each calculated field should be assigned under a category as follows:


- The Category field for Student reports use: “Worktags - Student”
- The Category field for HCM reports use: “Worktags - HCM / Headcount Planning”
- The Category field for Financials reports use: “Worktags- Financials”

The Authorized Usage field should be left as ‘Default Areas’.

Category	*	<input type="text" value="x Worktags - HCM / Headcount Planning"/>	
Authorized Usage	*	<input type="text" value="x Default Areas ..."/>	

Intermediate Calculations & Reference ID

Where a calculation field is for an intermediate calculation, ensure you check the box for Intermediate Calculation in the Additional Info tab of the "Create Calculated Field or "Edit Calculated Field" tasks.

Authorized Usage	*	<input type="text" value="x Default Areas ..."/>	
Intermediate Calculation		<input checked="" type="checkbox"/>	
Do Not Use		<input type="checkbox"/>	

Follow the [Workday Reference IDs Data Standard](#). Workday automatically assigns a reference ID to calculated fields consisting of the object name concatenated with the calculated field name upon initial save of the calculated field.

APPENDIX

Process tasks to be used when creating Calculated Fields:

1. Change log must be created for all new reports or changes being migrated to PROD.
2. Spec must be created for a new report/Spec must be modified for an existing report (If you can't access this, please let me know).
Reporting team can help with this step – please kindly forward the ticket to the ISC Data & Reporting team.
3. Calc Fields = System Wide vs Report Specific

When Copying a report

If you are copying an existing report, always check if the existing report has report-specific calculated field.

You can tell a report specific vs system wide calc field by pulling it up in Workday. You will see Report Name for report-specific calc fields.

(If you copy an existing report with a report-specific calc field, even if you remove that calc field from your copied report, it is not being deleted from Workday and creating many duplicates.)

Calculated Field - Evaluate Expression rCF - EE - Onboarding Setup Auto Advance Date

Report Name UBC Onboarding Setup Events Qualified for Auto Advance

Field Name rCF - EE - Onboarding Setup Auto Advance Date

Business Object Onboarding Setup Event

Calculation Additional Info Where Used

Evaluate Expression

Field Type Date

Business Object (empty)

Default Value Effective Date

1 item

Condition	Return Value If C
rCF - T/F - Onboarding Setup has a Due Date	rCF - EE - Effer

Convert Calculated Field for Report

If you are not able to select a report specific calc field in this task, check the calc field to make sure that all underlying calc fields are system-wide.

Workday will not let you convert the calc field until all underlying calc fields are system-side.

Convert Calculated Field for Report

Convert a report specific calculated field to be defined system-wide so other custom reports can reference it

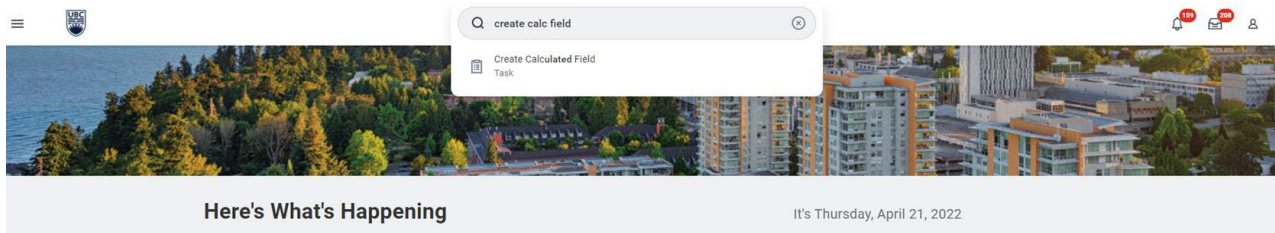
Report Name

Business Object

Field Name

Create a system wide calc field

Use 'Create Calculated Field' task from WD main search to create a system wide calc field.



Do not use “Create Calculated Field for Report” option from within the report. This creates a report specific calc field.

> Additional Info

Columns Sort Filter Subfilter Prompts Output Share Advanced

6 items

	Order	Business Object	Field	Column Heading Override	Format	Options
+	▼	× Worker ...	× Employee ID ...			
+	▲▼	× Worker ...	× Last Name ...			
+	▲▼	× Worker ...	By Category >			
+	▲▼	× Certification ...	All >			
+	▲▼	× Certification ...	Global Fields >			
+	▲▼	× Certification ...	Other >			
+	▲▼	× Certification ...	Create Calculated Field for Report			
+	▲▲	× Certification ...	Search			