EDG Checklist for Workday Reports

Purpose

This checklist is intended to support Report Writers, Report Administrators and WD Student Functional Team (responsible for creating report specifications) to ensure report metadata captured meets the required EDG standards outlined in the Workday Report Standard & 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.

Report Name

☐ **The title:** is conformed to the naming convention provided in the Workday Report Standard and clearly states the report purpose.

Refer to the *Additional Notes on Specific Report Names* section in the standard for more information for:

- Reports that contain Personal or Sensitive Information
- Reports on Worker on Finance
- Similar reports summarized by Unique Attributes
- Extract by Detail Reports

☐ **"COM-RPT-#"**: Reports that are under development or going through testing. This prefix should be removed from the report name at the time of migration to the production environment.

☐ Ends with "-Distributed" if the report is for restricted access within a specific organization unit. (i.e. it is not a central report).

☐ Ends with "**-Central**" if the report is a central report.

See Appendix for examples and more details.

Report Type

Report type value has been selected from the following options:

☐ Report type is ***Advanced****:* Display fields from the primary business object and related business objects with advanced design options.

☐ Report type is ***Composite****:* Combine multiple reports into 1 report. Each sub-report can have a different data source.

☐ Report type is ***Matrix****:* Group and summarize data by 1 or 2 fields that contain repeating values. Matrix reports are similar to pivot tables and crosstabs.

☐ Report type is ***nBox:*** Display counts of business object instances in a 2-dimensional matrix, enabling you to compare and visualize objects across 2 fields.

☐ Report type is ***Search****:* Display instances of a business object that you can narrow down with search terms or facet filters.

☐ Report type is ***Transposed****:* Compare and analyze data by swapping rows for columns.

☐ Report type is ***Trending****:* Group data by time period for trend analysis. You can also group, summarize, and drill down on data.

Report Tags

One of the following has been selected to indicate **1.** User **access tag**

☒ Central

☐ Distributed

☐ **2. Sensitivity Tag:** select if the report contains Personal Information:

☐ Personal Information

One of the following has been selected for the **3. Domain tag**:

☒ Finance

☐ HCM

☐ Student

☐ Cross-Domain

☐ One of the following has been selected for the respective **4. Business Area tag**:

Finance Domain Tag Name: 4. FIN-		**HCM Domain Tag Name: 4. HCM -**		**Student Domain Tag Name:**
Asset Installation and Management		Absence		Admissions
Banking and Cash Management		Academic		Assessment Outcomes
Budget Development and Forecasting		Benefits		Curriculum Management
Capital and Asset Accounting		Collective Agreement Management		Enrolment
Customer Accounts		Compensation		Graduation
Endowment Accounting		Compliance Training		Learner Financial Management
Expenses		Core HCM		Learner Financial Support
FDM		Onboarding		Learner Management
Financial Accounting and Institutional Reporting		Offboarding		Program Planning & Management
Procurement and Supplier Accounts		Payroll		Progression
Projects		Payroll / Time Tracking		Registration
Research Grant Reporting		PD Funding and Tuition		Scheduling
		Recruiting		Strategic/Management
		Workforce Analytics		Student Advising
		Workplace Learning		Student Core
		PD Fund		Student Financials
		Faculty Salary Increase		Student Records
				Transfer Credit

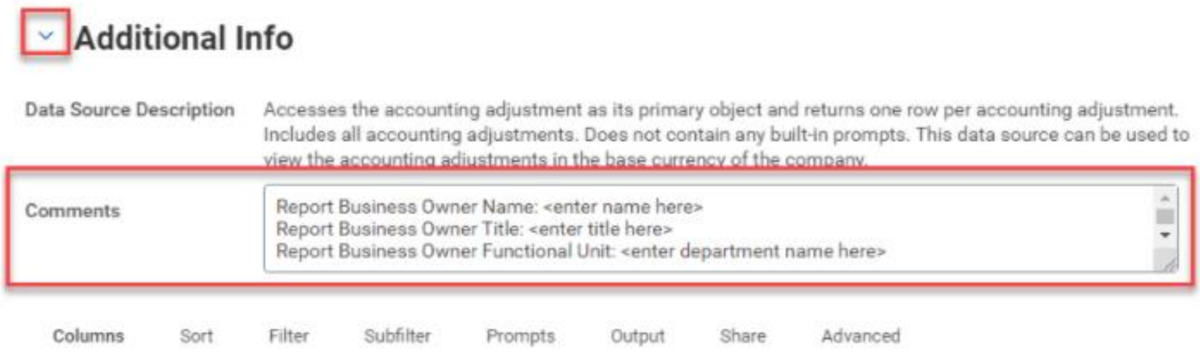
If applicable, one of the following has been selected for the additional tags: **5. Other -**

Dashboard/Worklet	The report is used in a dashboard, homepage or worklet

Migration Ready	The report is ready to be migrated to Production. Tag should be removed in Production.
Security	The report is used for security maintenance work.
Audit	The report is used to audit compliance, security and maintenance e.g. identify terminated employees with user based security roles, terminated employees in scheduled report's recipient list, non-reporting team member updating a report in PROD, etc.
UDAP	The report is for UDAP.
Sub-report	The report is a sub-report used in Composite reports.
Conversion	The report is used in a conversion.
Integration	The report is used in integration.
Report to support BIRT	The report is feeding BIRT forms e.g. T4, pay slips, etc.
Alert/BP	The report is used to support a business process configuration or is feeding a Workday alert configured in the system (e.g. a report identifying a Foreign worker whose permit is expiring), and a notification has been configured to send an alert.
Regulatory	Report is for regulatory compliance.
BP Configuration	Report is used to support Business Process Configuration

Report Business Owner

☐ For all reports (except for Simple report type) the Report Business Owner is captured under Additional Info Section



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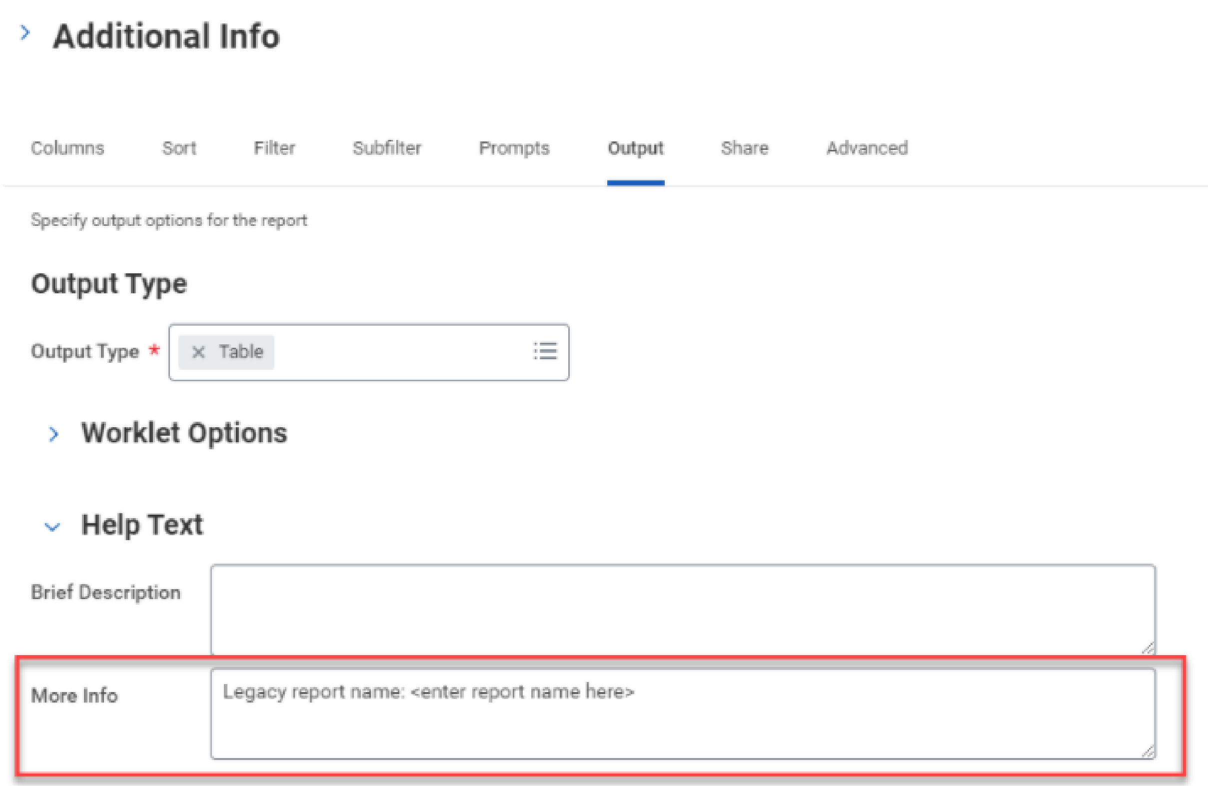
Report Purpose and Legacy Name

☐ For all report types except *Simple* reports the **Report Purpose**:

- is captured under Additional Info --> Output --> Help Text--> **Brief Description**.
- contains reason / objective of the report.
- contains target audience and examples of how the report will serve the end user.

☐ (If applicable) For all report types except *Simple* reports the Legacy Report Name:

- is captured under Additional Info --> Output --> Help Text--> **More Info**.



Report Column Name

☐ Column has conformed to the naming convention provided in the Workday Report Standard.

[PRIME WORD] [MODIFIER/QUALIFIER WORDS OR PHRASES] [CLASS WORD]

☐ If a calculated field is used in the report:

- Override the column heading using the calculated field description in concise manner for a user to understand.
  i.e. Calculated Field: zCF - ESI - PD Fund on Non Primary Position
  Override Label: "Non-Primary Position PD Fund"

- Follow the Calculated Fields Report Standard for the naming convention. In addition, the name is accurately describing the logic.

- Description is populated

- Calculated fields using text constant should be in Global Business Object

- The calculated field is system wide.

APPENDIX

1. Report Name details and examples

Reports must be easy to run: Please keep in mind that your report will become available to other Workday users. These users should be able to run your report easily and consume the output. Your report name follows the naming standard and would not be confused with other reports with a similar name.

- Your report name is suffixed with "- Central" or "- Distributed".
- Your field names follow the field naming standard. They must be concise.
  - EXAMPLE: Supervisory Org, Functional Unit, Functional Unit Department & Academic Unit are different fields in Workday and your field name should be accurate.
- DO NOT use legacy database field names such as PG, Rcd#, etc.
- Some of the fields you select are clickable and may be helpful to the users.
- Need a calculated field? Always look for existing fields before considering a calculated field.
- Reports without calculated fields are easier to be maintained and to troubleshoot. Managing thousands of calculated fields is not sustainable and if not managed properly, it could cause issues in reports.
- Do not use "-" , "/", just use spaces
- Use capital letters for the first alphabet in the principal words. Do not capitalize prepositions, articles, or conjunctions.
- Do not use the word " Report" in the name
- Do not use abbreviations unless it is institutionally common practice to abbreviate a word or phrase.

Incorrect Report name	**Correct Report Name**	**Notes**
Find Student final outcomes	Student Final Outcomes - Central	-Remove “Find” -Capital letters -add “- Central”
Graduation: Extract for convocation management system	Extract Graduation Details for Convocation Management System - Distributed	-Remove “:” -Capital letters -Rewording -Add “-Distributed”
Student with Past Due Charges - Interest Calculated	Students with Past Due Changes - Central	-Remove “-“ Remove “Interest Calculated” -Add “Central”
ECE Error Report	Early Childhood Education (ECE) Student Error - Distributed	-Remove “Report” -Do not use abbreviation -Add “ -Distributed “ - Add more description