

Creating shortcuts for your reports in Workday for Cardholders:

1. Click on the little gear all the way to the right on the “Welcome” line




2. Under the “Optional Worklets,” click on the plus sign in the top grey bar to add a line (A) and type the word “Favorites” in the new blank line that appears (B). Press enter. You can ignore the alert. Click the orange “OK” at the bottom of the page















Optional Worklets

Select the optional worklets you would like to include on your Home page.

 1 Alert

 Errors and Alerts Found

6 items

	Order	*Worklet	Worklet Title
		<input type="text" value="x Favorites"/> 	
		<input type="text" value="Birthdays"/>	
		<input type="text" value="Career"/>	
		<input type="text" value="Compensation"/>	
		<input type="text" value="Reports"/>	
		<input type="text" value="Purchases"/>	

3. Go back to your Workday homepage. Now you’ll see “Favorites” in the “Applications” on the right, with a picture of a Star. Click on the Star.



Favorites

4. On the thick blue bar, click on the gear all the way to the right

 Favorites

5. The “Manage Favorites” menu will appear. We’ll add reports to the first two. In the “Favorite Tasks/Reports,” type My Procurement Card Transaction Verifications” if you are a cardholder. If you are not a current cardholder, the report will not save. Select the report after it populates.

Manage Favorites

Favorite Tasks/Reports


Favorite Custom Reports

Favorite Business Objects

My procur ×

3 Results

- Manage My Procurement Favorites
- My Procurement Card Transaction Verifications
- My Procurement Card Transactions



6. In “Favorite Custom Reports,” you’ll add two if you are a fiscal officer, ISU Transaction Detail, and ISU Financial Summary Balance Restricted Funds. You will be able to have multiple reports selected in this field.

Select the orange “OK” and then “Done” at the bottom of the page. Now you have a shortcut to this helpful report whenever you select the Favorites star on the homepage!