

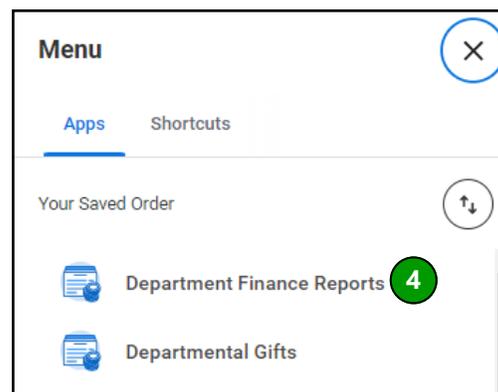
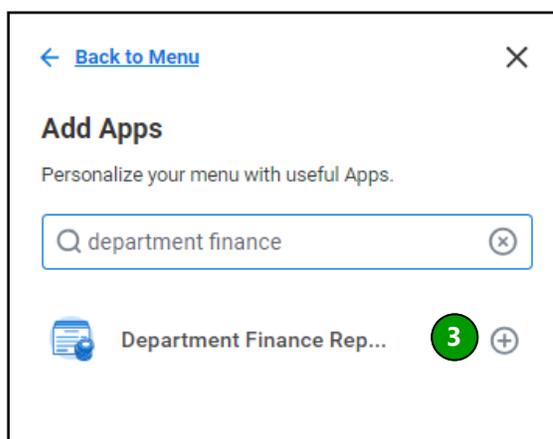
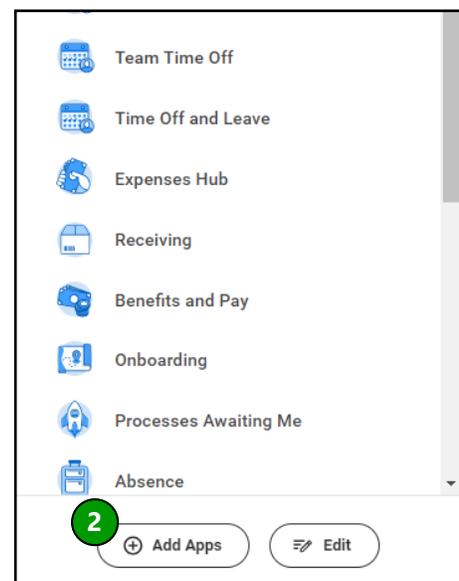
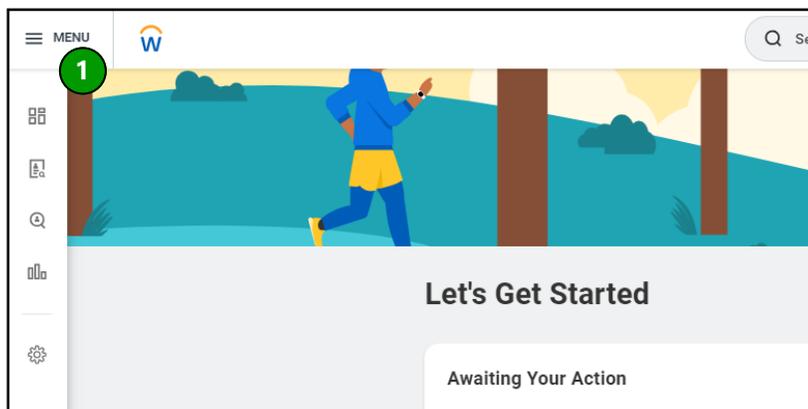


## Department Finance Reports Dashboard

The department of Finance has consolidated a list of helpful financial reports in one location in Workday. This dashboard can be accessed via the search bar or saved as an app. Use the guide below to locate and save the dashboard as an app.

### Save the Dashboard as an App

1. From the Workday homepage, click the **Menu** button.
2. On the Apps tab of the drop down, select **Add Apps**.
3. Search and select Department Finance Reports.
4. Review your updated list of apps that contains a link the Department Finance Reports Dashboard.





# Department Finance Reports Dashboard

For a comprehensive list of reports with descriptions, security roles, and legacy names, click here:  
**Link Coming Soon!**

## Navigating Dashboards

1. Toggle between the dashboards for Clinical Enterprise and Academic Enterprise.
2. View descriptions of each report nest to the report name
3. Open reports in a new tab– right click the report name, click **See in New Tab**

Department Finance Reports

Clinical Enterprise **1** Enterprise

Report Task	Brief Description
CR Fin - Department 12-month Rolling Trend by Account	Similar in format to the Department Transaction Summary, provides a 12-month rolling trend view of all account-level activity for the prompted organization. Prompts on organization and Account Ledgers and Summaries. Similar to the legacy report Single Year Trend Report - Budget and Actual from BI LaunchPad.
CR Fin - Department Account Activity	For the prompted Organization and time period, returns the beginning balances, debit amount, credit amount, and ending balance for all accounts for the period.
CR Fin - Department Fiscal Year Budget Trend	Returns a fiscal year budget trend for the prompted organization and period and the Account and Spend Category level. Similar to legacy BI LaunchPad report Single Year Trend - Budget and Actual.
CR Fin - Provider Collections by Bill Area Trend	This report delivers FYTD Trending for Provider and Bill Area level collection amounts for the Professional Services Ledger Account (Account #4020), and Physician Income Revenue Category (RC203), sourced from Epic's Professional Billing system.
CR Fin Clinical Enterprise Performance - Cath, EP & Holding	Provides variances for key statistics, financial metrics, and P&L information for the Clinical Enterprise area of Cath, EP and Holding. Comparisons to budget and prior year. Prompts on Organization which can be run on a cost center, or cost center hierarchy. Similar to the legacy MD340 report from eDog.
CR Fin Clinical Enterprise Performance - Cath, EP & Holding Trending	Provides a 12-month rolling trend of key statistics, financial metrics and P&L information for the Cath, EP & Holding area. Prompts on Organization, which can be run for a cost center or cost center hierarchy member.
CR Fin Clinical Enterprise Performance - Patient Days	Provides key statistics, financial metrics and P&L information for inpatient areas. Comparisons to budget and prior year. Prompts on Organization which can be run by cost center or cost center hierarchy member. Similar to the legacy MD340 report from eDog.

Department Finance Reports

Clinical Enterprise Academic Enterprise **1**

Report Task	Brief Description
CR Fin - Academic Enterprise Clinical Practice Budget Trend	12-month rolling trend in the P&L format for the Academic Enterprise. Organization prompt can be run by cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity). Similar to legacy report MD340 from eDog.
CR Fin - Academic Enterprise Clinical Practice Details	Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity). Similar to legacy report MD340 from eDog.
CR Fin - Academic Enterprise Clinical Practice Details Trending	12-month rolling trend of the P&L format for Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity).
CR Fin - Academic Enterprise Cores	Filtered results based on CARTS values to return CORES data. P&L format for Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns only CORES activity.
CR Fin - Academic Enterprise Grant and Gift Statement	Provides financial performance for Grant and Gift activity for Academic Research areas. Meant to track variances against operating budget, does not provide grant budget to actual spending. Organization prompt can be run for cost center or cost center hierarchy member. Similar to legacy report MD340 from eDog.
CR Fin - Academic Enterprise Non-clinical Budget Trend	Returns the annual fiscal year budget trend in the P&L format for non-clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity).
CR Fin - Academic Enterprise Non-clinical	P&L format for non-clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity).

CR Labor Reports **2**

Report Task	Brief Description
CR - Center Account Detailed	Provides Hourly and Compensation Data at each Employee level, grouped by Cost Center
CR - Center Account Detailed by Spend category Labor Reporting	Provides Hourly and Compensation Data at each Employee level, grouped by Cost Center
CR - Center Account Detailed - Tabular	Provides Hourly and Compensation Data at each Employee level
CR - Center Account Summary	Provides the summary of Hourly and Compensation Data at each Employee level, grouped by Cost Centers. The report also drills down on Job Category for further analysis
CR - Center Account Summary - Salaries and Wages	Provides the summary of Hourly and Compensation Data at each Employee level, grouped by Cost Centers. When compared to the 'CR - Center Account Summary' report, this reports pulls in additional information about Fringe amount in a separate column. The report also drills down on Job Category for further analysis

CR Fin - Academic Enterprise Clinical Practice Budget Trend **3**

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## QUESTIONS?

Please email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org).