

VUMC BUSINESS EDUCATION



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.





EDUCATION 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

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3. Open reports in a new tab- right click the report name, click See in New Tab

← Department Finance Reports											
Clinical Enterprise											
CR Clinical Enterprise Reports		æ	CR Labor Reports				¢3	CR Researc	ch Reports		
Report Task	Brief Description	*	Report Task		Brief Description		-	Report Task			
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 organization. Prompts on organization and Account Ledgers and Summanes. Similar to the legacy report Single Year Trend Report. Budget and Actual from Bi LaunchPad.		CR - Center Account Detailed		Provides Hourly and Compens Employee level, grouped by Co	Hourly and Compensation Data at each e level, grouped by Cost Center		CR Effort Actu	uals and Obligation		
		H	CR - Center Account Detailed by category Labor Reporting	y Spend Provides Hourly and Compensi Employee level, grouped by Co		ation Data st Center	at each	CR Fin - Budg	et vs Actual for Gra		
CR Fin - Department Account Activity	For the prompted Organization and time period, returns the beginning balances, debit amount, credit amount and engling balances for all accounts for the	H	CR - Center Account Detailed - T	fabular	Provides Hourly and Compensation Data at Employee level Data are an employed and comp Data and Employed and comp Centers. The report also data down of ubd Category for further analysis Provides the summary of Nourly and Comp Data at each Employee level, grouped by C Centers. When compared to the CR- Center Account Summary report, this reports pulls additional information about Fringe emport Category for further analysis		at each	CR Fin - Budg	et vs Actual for VU		
CP Ein - Department Eincel Verz Budget	period. Returns a fiscal year budget trend for the prompted		CR - Center Account Summary				npensation Cost ob				
Trend	organization and period and the Account and Spend Category level. Similar to legacy BI LaunchPad report Single Year Trend - Budget and Actual.		CR - Center Account Summary -	Salaries and			mpensation (Cost	CR Fin - Depar	rtment Salary Tren		
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.	4	Wages	norte			nter Jills in unt in a own on Job	or Award			
CR Fin Clinical Enterprise Performance - Cath, EP & Holding	Provides variances for key statistics, financial metrics, and P&L information for the Clinical Entreprise area of Carb, 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.	Clinic	R Academic Enterprise Reports	1		٥	CR Labor Report	s		\$	CR VMG Reports
CR Fin Clinical Enterprise Performance -	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.	F	Report Task Brief Description			•	Report Task		Brief Description	-	Report Task
Cath, EP & Holding Trending		C F	R Fin - Academic Enterprise Clinical See in New Tab vactice Budget Trend Copy URL		al year budget trend in the P&L as of the Academic prompt can be run by cost	H	CR - Center Account Detailed		Provides Hourly and Compensation Data at each Employee level, grouped by Cost Center		Bill Area and Provider Audit
CR Fin Clinical Enterprise Performance -	Provides key statistics, financial metrics and PBL 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 search from sDate		Copy T View P	Text Text Printable Version		H	CR - Center Account Detailed by Spend category Labor Reporting		Provides Hourly and Compensation Data at each Employee level, grouped by Cost Center	H	CR FIN - Allocation Transactions
		F	2R Fin - Academic Enterprise Clinical Practice Details Export	to Excel department leve that department	inization prompt can be run by cost enter hierarchy level. If run at the I, returns the budgeted margin for (i.e. no grant or gift activity). Similar		CR - Center Account Detailed - Tabular CR - Center Account Summary		Provides Hourly and Compensation Data at each Employee level Provides the summary of Hourly and Compensation	н	CR FIN - Cost Center Professional Revenue Trend
Vi	iew More		°R Fin - Academic Enterneire Clinical	13 month rolling	trend of the P&L format for Clinical				Centers. The report also drills down on Job Category for further analysis		CR FIN - Professional Revenue Trend - Cost Center Level
CR Gifts Reports		F	Practice Details Trending	areas of the Aca prompt can be n hierarchy level. I the budgeted mi grant or gift acti	demic Enterprise. Organization un by cost center, or cost center f run at the department level, returns argin for that department (i.e. no vity).		CR - Center Account Wages	Summary - Salaries and	Provides the summary of Hourly and Compensation Data at each Employee level, grouped by Cost Centers. When compared to the CR - Denter Account Summary report, this reports pulls in		CR Fin - Provider Collections by Bill Area Trend
Report Task	Brief Description	c	CR Fin - Academic Enterprise Cores	Filtered results to CORES data. P&	ased on CARTS values to return L format for Clinical areas of the				separate column. The report also drills down on Job Category for further analysis	81	
CR Fin Endowment Gifts	Report is used to track remaining balance available compared with annually budgeted endowment distributions of both donor and internal endowments. The report provides both a remaining balance taking into account commitments and			Academic Enter run by cost cent run at the depart activity.	prise. Organization prompt can be et or cost center hierarchy level. If tment level, returns only CORES		CR - FTE Detailed		Provides detailed information about Actuals FTE by Cost Center, Ledger Account, Productivity Description, Spend Category, Job Profile, Hours & FTE		Department Expenses by Assignee Department Provider Level Income
	obligations in addition to actual spend, as well as a remaining balance that only considers actual spend. In addition to the remaining balances, the market value of each endowment is also returned. Report	s	CR Fin - Academic Enterprise Grant and Gift Statement	Provides financi activity for Acad track variances of provide grant bu Organization pro cost center hiero report MD340 fr	al performance for Grant and Gift emic Research areas. Meant to against operating budget, does not dget to actual spending. wript can be run for cost center or archy member. Similar to legacy on eDog.		CR - Hours and Dollar Extract	s Data Center Prompt	Provides information about Hours & Amount paid for each worker by Cost Centers. Pay Date Range and Earnings code are pulled to the output according to the 'Period' prompt selected during the runtime		Statement VMG Department Revenue by Provider
		C	CR Fin - Academic Enterprise Non-clinical Budget Trend	Returns the anni P&L format for r Enterprise. Orga	ual fiscal year budget trend in the ion-clinical areas of the Academic nization prompt can be run by cost enter hierarchy level. If run at the		CR - Labor Distributio	n by Earnings Detailed	Provides detailed information about each employee's earnings by categories such as Regular, PTO, Sick, Orientation, Other, Overtime, Shift and Premium		CP Research Reports
				department leve that department	I, returns the budgeted margin for (i.e. no grant or gift activity).		CR - Labor Distributio	n by Hours	Provides summary of hours by each cost center, divided into categories such as Regular, PTO, Sick, Orientation, Other, Overtime, Shift and Premium. It		Report Task
		0	CR Fin - Academic Enterprise Non-clinical	Pat format for r	on-clinical areas of the Academic	*		vi	also drills down to Ledger Account, Job Category	*	CR Effort Actuals and Obligations
											CR Fin - Budget vs Actual for Grant or Award
			View More				CR Gifts Reports			\$	
							Report Task	0-	Brief Description Report is used to track remaining halance available		CR Fin - Budget vs Actual for VU Grant
							UK Fin Endowment G	π	compared with annually budgeted endowment distributions of both donor and internal endowments. The report provides both a remaining balance taking into account commitments and obligations in addition to actual spend, as well as a endowments.		
									 In addition to the remaining balances, the market value of each endowment is also returned. Report can be prompted for a gift hierarchy or a specific eift iD within the Ownerization. 		CR Fin - Department Salary Trend for Grant or Award

QUESTIONS?

Please email <u>BusinessEducation@vumc.org</u>.