



## CR FIN Workflow Aging Report

The Workflow Aging Report can be run to view financial transactions that are still In Progress in Workday. Users can run the report to view transactions that they have either initiated in Workday, or that are currently awaiting action by them. This report is currently only available for financial business processes and for those with the following security roles: Cost Center Manager, Cost Center Financial Analyst, Cost Center Financial Analyst with Payroll Details, Grant Manager, Grant Financial Analyst, Program Manager, Program Financial Analyst, Financial Analyst, Project Financial Analyst, Gift Finance Analyst, Gift Manager.

### CR FIN Workflow Aging Report - Prompts

Run the report by entering any part of the report name in the Workday Search bar and selecting.

1. Your name will populate by default in the **Initiating Worker** prompt. The report results will include any financial transactions still in process that you initiated, and show where they are currently in workflow.
2. Your name will populate by default in the **Awaiting Persons (Workers)** prompt. The report results will include any financial transactions still in process that are awaiting action by you, regardless of who initiated the transaction.
3. All financial **Business Processes** available for this report will default. You can change this prompt to limit the results.
4. Select a **Start Date** to limit the results. Leaving this prompt blank will include **All**.
5. Select an **End Date** to limit the results. Leaving this prompt blank will include through now.
6. Add a **Filter Name** to create and save a custom version of these report filters that can be run at a later time by selecting **Manage Filters**.

The screenshot shows the configuration window for the 'CR FIN Workflow Aging Report'. It includes the following fields and options:

- Initiating Worker:** A dropdown menu with 'Stanley Cupp (0123456)' selected. A green circle with the number '1' is next to it.
- Awaiting Persons (Workers):** A dropdown menu with 'Stanley Cupp (0123456)' selected. A green circle with the number '2' is next to it.
- Business Processes:** A list of business processes including 'Accounting Adjustment Event', 'Accounting Journal Event', 'Accounting Journal Intercompany Event', 'Accounting Journal Unpost Intercompany Event', and 'Accounting Journal Unpost-Reverse Event'. A green circle with the number '3' is next to the third item. A 'MORE (56)' link is at the bottom of the list.
- Start Date:** A date picker with 'MM/DD/YYYY' format. A green circle with the number '4' is next to it.
- End Date:** A date picker with 'MM/DD/YYYY' format. A green circle with the number '5' is next to it.
- Filter Name:** A text input field. A green circle with the number '6' is next to it.
- Manage Filters:** A button labeled 'Save' and a text label '0 Saved Filters'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.



## CR FIN Workflow Aging Report

Once you run the report, you can sort or filter the columns. You can also use the links within the report to go directly to the Event or Employee to take the appropriate action.

**CR FIN Workflow Aging Report** 🔍 📄

Initiating Worker: Stanley Cupp (0123456)      Business Processes: Accounting Adjustment, Accounting Journal Entry, Accounting Journal Int, Accounting Journal Un, More (56)

*Note: Right click any hyperlink (blue) and select "See in New Tab" to remain on this report in the current tab.*

32 Items 🔍 📄 📊 📑 🗑️

Initiating Person	Initiating Worker	Status of Event Records Awaiting Action	Date and Time Initiated	Awaiting Persons (Workers)	Business Process Type	Business Process Event	Business Process Step Awaiting Action (Includes Subprocesses)	Days Since Assignment	Due Date	Transaction Status
	Stanley Cupp (0123456)	Saved for Later	10/11/2023 11:40:38.010 AM	Stanley Cupp (0123456)	Create Payroll Accounting Adjustments	Payroll Accounting Adjustment: Peter Parker (0011111) - 06/01/2023 - 09/30/2023	Create Payroll Accounting Adjustments (Default Definition) step a - Initiation	33		In Progress
Constance Noring	Constance Noring (0333444)	Awaiting Action	11/09/2023 09:00:00.812 AM	Ella Vader (0222555) Stanley Cupp (0123456)	Expense Report Event	Expense Report: EXP-0005555 - Constance Noring (0333444) / 08/2023 for \$69.	Expense Report Event (Default Definition) step d3 - Approval	4		In Progress
Constance Noring	Constance Noring (0333444)	Awaiting Action	11/09/2023 09:17:35.177 AM	Ella Vader (0222555) Stanley Cupp (0123456)	Expense Report Event	Expense Report: EXP-0007777 - Constance Noring (0333444) / 11/09/2023 for \$61.00	Expense Report Event (Default Definition) step d3 - Approval	4		In Progress

My Actions    Details    Process

My Actions 1 item

Awaiting Me

Approve Expense Report

### Workflow Aging Report - Results

Click on any column header to sort or filter the results.

1. **Initiating Person:** The person who initiated the financial transaction will display if different than the Initiating Worker selected in the report prompts.
2. **Initiating Worker:** Lists the initiator of the financial transaction. This column includes a hyperlink to the worker's employee record in Workday.
3. **Status of Event Records:** The current status of the transaction.
4. **Date and Time Initiated:** The date and time the transaction was originally submitted.
5. **Awaiting Persons:** The name(s) of the person who has the next step in the process that is awaiting action.
6. **Business Process Type:** The Workday financial business process name that is incomplete.
7. **Business Process Event:** Lists the details of the Workday financial process, including a link directly to the item in Workday. If you are the person awaiting action, you can click the hyperlink to go directly to the transaction and take the appropriate action.
8. **Step Awaiting Action:** Details of what step in the overall business process is currently awaiting action.
9. **Days Since Assignment:** The number of days the current item is awaiting the action listed.
10. **Due Date:** Displays the Workday due date, if applicable.
11. **Transaction status:** Displays "In Progress".