



Workday Finance, configured by a Chartered Accountant.

ABHAYJAISWAL.COM

■ WORKDAY FINANCE · STEP BY STEP

Custom Landing Pages

■ Table of Contents

1. Purpose
2. Prerequisites
3. Journals
4. Ad Hoc Payment & Payroll
5. Supplier Invoices & Expense Report
6. Customer Invoices & Payments
7. Business Assets
8. Common Errors and Resolutions
9. Best Practices

■ Purpose

This guide provides a detail overview for the a Custom Landing page in Workday. By creating a custom landing page it allows for consolidation of relevant tasks, reports, or information to be in a single, easily accessible location.

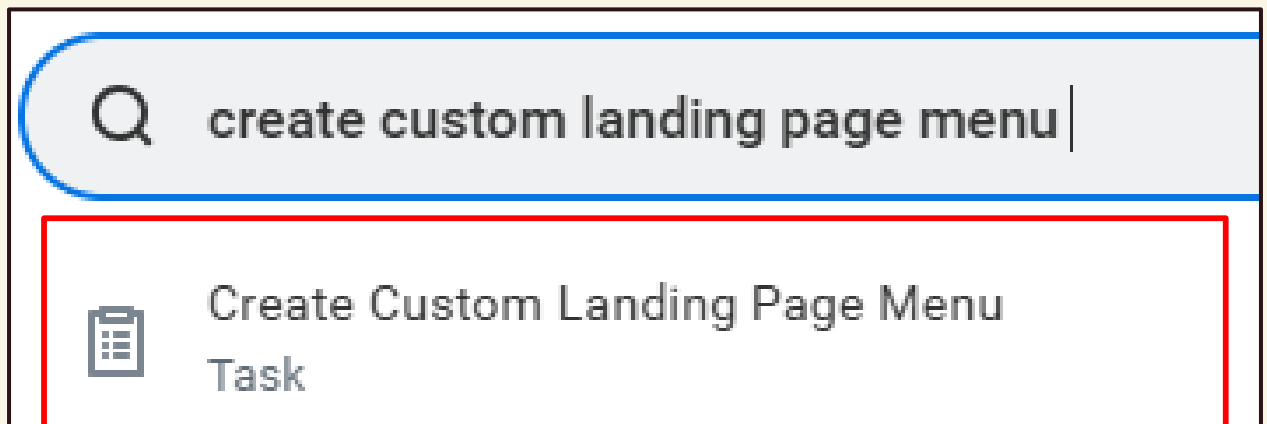
■ Prerequisites

Before using *Custom Landing Page*, ensure the following:

- You have the appropriate Workday Security role (e.g. Finance Administrator, Financial Performance Management Administrator, Information Administrator, Controller, Accountant)
- Set up Security Policy for *Set Up: Tenant Setup- Worklets*
- Set up *System* functional area

■ Create Custom Landing Page

- Search for *Create Custom Landing Page Menu* and select the related task.





- Include the sections you would like added.
 - Journals, Ad Hoc Payment & Payroll, Supplier Invoices & Expense Reports, Customer Invoices & Payments, and Business Assets.

5 Items						
	Order	*Section Label		Order	Item	
		Journals				
 			 		Task	
					 Journals	
 		Ad Hoc Payments & Payroll				
			 		Task	
					 Payroll	
 		Supplier Invoices & Expense Reports				
			 		Task	
					 Supplier Invoice	
			 		Task	
					 Expense Report	
 		Customer Invoices & Payments				

■ Journals Tab

- Provides information on journal entries over a given period of time.
- Information is grouped by *Company*, *Journal Entry Status*, and *Period*.

Journals

Ad Hoc Payments & Payroll

Supplier Invoices & Expense Reports

Customer Invoices & Payments

Business Assets

Journal Entry Status

Company	Jan - 2022				Feb - 2022				Mar - 2022		Apr - 2022		May - 2022		Jun - 2022		Jul - 2022		Aug - 2022		Sep - 2022		Oct - 2022		Nov - 2022		Dec - 2022		Count
	Canceled	Created	Posted	Unposted	Canceled	Created	In Progress	Posted	Canceled	Posted	Posted	Posted	Canceled	Posted	Posted	Posted	Posted	Posted	Posted	Posted	Posted	Posted	Canceled	Posted	Canceled	Posted			
	1	0	99	0	0	0	0	94	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	194
	2	0	159	0	0	0	1	30	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	192

Journals										
Ad Hoc Payments & Payroll Supplier Invoices & Expense Reports Customer Invoices & Payments Business Assets										
Journal Entry Status										
Company	Jan - 2022				Feb - 2022				Mar - 2022	
	Canceled	Created	Posted	Unposted	Canceled	Created	In Progress	Posted	Canceled	Posted
	1	0	99	0	0	0	0	94	0	0
	2	0	159	0	0	0	1	30	0	0

■ Ad Hoc Payments & Payroll Tab

- Consists of two worklets: Ad Hoc Payments and Payroll.
- Ad Hoc Payments report provided information on Ad Hoc Payments with a status of draft or in progress.
 - These rows are grouped by Company and the columns are grouped by Period and Status.
- The Payroll report provides information on payroll resulted in errors.
 - These rows are groups by Company, Payroll Period, and Status.

Payroll Results Status - Error				
Company	02/21/2022 - 03/06/2022 ()			Count
	Error			
	3			3

■ Supplier Invoices & Expense Report

- Consists of two worklets: Supplier Invoices and Expense Reports.
- The Supplier Invoice report provides information on Supplier Invoices with a status of draft or in progress.
 - These rows are grouped by Company and the columns are grouped by Period and Status.
- The Expense Report worklet provides information on Expense Reports with status of draft or in progress.
 - These rows are grouped by Company and columns are grouped by Period and Status.

27 items																			
Company	Mar - 2021		Apr - 2021		Jun - 2021		Jul - 2021		Aug - 2021		Sep - 2021		Oct - 2021		Nov - 2021		Dec - 2021		Count
	Draft	In Progress	Draft	In Progress	Draft	In Progress	Draft	In Progress	Draft	In Progress	Draft	In Progress	Draft	In Progress	Draft	In Progress	Draft	In Progress	
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3
	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	2
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14

■ Supplier Invoices & Expense Report

- The Expense Report worklet provides information on Expense Reports with status of draft or in progress.
 - These rows are grouped by Company and columns are grouped by Period and Status.

Expense Report - Draft/In Progress - YTD 					
Company	Jan - 2022		Feb - 2022		Count
	Draft	In Progress	Draft	In Progress	
	0	0	3	1	4
	37	7	41	33	118

■ Customer Invoices & Payment

- Consists of two worklets: Customer Invoices & Payments
- Customer Invoices worklet provides information on Customer Invoices with the status of draft or in progress.
 - These rows are grouped by Company and the columns are grouped by Period and Status.
- Customer Payments worklet provides information on Customer Payments with the status of draft or in progress.
 - These rows are grouped by Company and the columns are grouped by Period and Status.

Customer Invoice - Draft/In Progress - YTD 

Company	Feb - 2022		Count
	Draft		
	1		1
	1		1

Progress - YTD 

	Jan - 2022	Feb - 2022	
--	------------	------------	--

Customer Payment - Draft/In Progress - YTD				
Company	Jan - 2022	Feb - 2022	Count	
	In Progress	In Progress		
	16	72	88	
	0	6	6	

■ Business Asset

- The Business Asset tab consists of a single worklet for Business Assets.
- The rows are grouped by *Company* and columns grouped by *Period* and *Status*.

Company	Jan - 2022	
	In Service	Pending Registration
	563	0
	76	0

Feb - 2022							Count
Registered	Removed	Disposed	In Service	Pending Registration	Registered		
2	1	1	1,168	0	3		1,738
0	0	0	70	0	0		146

Company	Jan - 2022					Feb - 2022				Count
	In Service	Pending Registration	Registered	Removed	Disposed	In Service	Pending Registration	Registered		
	563	0	2	1	1	1,168	0	3		1,738
	76	0	0	0	0	70	0	0		146

■ Common Errors and Resolutions

Issue	Description	Resolution
Unable to Delete a Report / Worklet	The report is linked to a Custom Landing Page Manu Report Definition Usage.	Access the Report Definition Usage table, use the Related Actions to open the Custom Landing Page view, and select Delete to remove the usage before deleting the report.
Dashboard Tabs Not Supported	Dashboard tabs are not supported on Custom Landing Page dashboard, which have been deprecated.	Recreate the custom dashboard using the <i>Create Custom Dashboard</i> task to ensure it is a Custom Landing Page Group, which support tabs.

■ Best Practices

- Standardized Naming Conventions: Utilize the Label section to clearly define worklet functions.
- Refresh Ledger Periods: Update the Ledger Period monthly to ensure all displayed data remains current and accurate.
- Maximizer Analytic Customization: Enrich dashboards with relevant data while maintaining strict security permissions to ensure users only see what they are authorized to view.



Thank You

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FOLLOW FOR MORE WORKDAY FINANCE WALKTHROUGHS