Reports and reporting in Workday

Workday has over 250 standard reports that a team of HR professionals from across campus examined. With that team’s input, Cornell has built several custom reports.

This document explores three categories of reports that the team suspects may meet your top-level reporting needs: additionally, you can supplement these reports by looking at and finding other Workday reports that may better suit your unit’s specific reporting needs. For example, use the slide out tab to the far-right side of your Workday screen: the navigation tab, just above your inbox tab, shows you categories of reports and tasks, to give you an idea of what is available in Workday.

Reports that will help you manage your workforce

Several reports will help you manage your workforce: this section explores reports for worker information, staffing information, and organization information.

Worker information

<table>
<thead>
<tr>
<th>Report name</th>
<th>Roles that can view it</th>
<th>Information the report offers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comprehensive Informational Extract</td>
<td>HR Partner, HR Lookup, Senior HR Partner</td>
<td>This detailed report shows all personal, compensation, demographic and job related information about academic, staff and temporary employees in a supervisory organization.</td>
</tr>
</tbody>
</table>

1) In the search box [enter search text], type **Comprehensive Informational Extract** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) In the **Organization** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the [ ] to see a list of all of the organizations in which you hold the role to run this report.. Select one (or many) supervisory organizations.

4) If you want to include subordinate organizations, click the check box to do so.
5) Enter the effective date.

6) If you want to find a specific employee, enter that person’s net ID.

7) Click **OK**. The report appears.

8) View the information in Workday, sort the information by clicking on the column headers, filter
the information by clicking the filter 📅 icon, view a bar chart by clicking the 📊 icon, or
download the data into Excel by clicking the 📁 icon.

<table>
<thead>
<tr>
<th>Report name</th>
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<th>Information the report offers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Term Appointments</td>
<td>HR Partner, HR Lookup, Management Partner, Manager, Senior HR Partner</td>
<td>This report shows the end employment date, expected end date, compensation and job related information for staff within a HC or SUBD supervisory organization. Suggestion: Managers and/or Management Partners should run this report on a monthly basis to track pending end-of-term appointment dates.</td>
</tr>
</tbody>
</table>

1) In the search box ⏽, type **Fixed Term Appointments** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) In the **Organization** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the 📚 to see a list of all of the organizations in which you hold the role to run this report. Select one (or many) supervisory organizations.

4) If you want to include subordinate organizations, click the check box to do so.

5) If you only want active employees, check the **Active Status** box.

6) Click **OK**. The report appears.

7) View the information in Workday, sort the information by clicking on the column headers, filter
the information by clicking the filter 📅 icon, view a bar chart by clicking the 📊 icon, or
download the data into Excel by clicking the 📁 icon.
Staffing information

<table>
<thead>
<tr>
<th>Report name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Positions and their FTE</td>
<td>HR Partner, HR Lookup, Management Partner, Manager,</td>
<td>This report shows the scheduled weekly hours and FTE for all staff within a HC or SUBD supervisory organization.</td>
</tr>
<tr>
<td></td>
<td>Senior HR Partner</td>
<td></td>
</tr>
</tbody>
</table>

1) In the search box, type **Positions and Their FTE** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) In the **Organization** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the **to see a list of all of the organizations in which you hold the role to run this report. Select one (or many) supervisory organizations.**

4) If you want to include subordinate organizations, click the check box to do so.

5) Enter the start and end dates.

6) Choose whether to include employees who have returned from leave and/or pending leave events.

7) Click **OK.** The report appears.

8) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the **filter** icon, view a bar chart by clicking the **chart** icon, or download the data into Excel by clicking the **download** icon.

<table>
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<th>Report name</th>
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</thead>
<tbody>
<tr>
<td>Headcount Report</td>
<td>Management Partner, HR Partner, Hire Initiator, Manager,</td>
<td>This report shows you information about SUBD or HC supervisory organizations, and this report, unlike others, allows you to view information in different ways: you can click on a numbers in the workers, active employees, or inactive employees columns to have Workday summarize the data based on one of many choices.</td>
</tr>
<tr>
<td></td>
<td>HR Lookup, Senior HR Partner</td>
<td></td>
</tr>
</tbody>
</table>

1) In the search box, type **Headcount Report** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.
Search button, or press the Enter key. The Search Results pane displays.

2) Select the report.

3) Select the date: this date field lets you view the status of the supervisory organization as of the date you choose.

4) In the Organization field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the to see a list of all of the organizations in which you hold the role to run this report. Select only one supervisory organization.

5) If you want to include subordinate organizations, click the check box to do so.

6) Click OK. The report appears.

7) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon, view a bar chart by clicking the icon, or download the data into Excel by clicking the icon.

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<tr>
<td>Staffing Activity Summary</td>
<td><em>HR Partner, MP, Manager, SR partner, HR look-up</em></td>
<td>This report, unlike others, allows you to view information in different ways: you can click on a numbers in the columns to have Workday summarize the data based on one of many choices.</td>
</tr>
</tbody>
</table>

1) In the search box, type Staffing Activity Summary and then click the Search button, or press the Enter key. The Search Results pane displays.

2) Select the report.

3) In the Organization field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the to see a list of all of the organizations in which you hold the role to run this report. Select only one supervisory organization.

4) If you want to include subordinate organizations, pending activity, or future activity click the check boxes to do so.

5) If you want to limit the summary to only show transactions with which a certain role has interacted (e.g., Management Partner or HR Partner), select the organization role.

6) If you want to view only transactions for one or more employee types (e.g., regular, fixed term,
student hourly, etc.), select which employee types you want to see in the summary.

7) Choose either the time period or the date range. If you select a time period, Workday will group the transactions in corresponding increments: e.g., if you select **Previous 24 Months**, the report will show transactions organized by each month of the year.

8) Click **OK**. The report appears.

9) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon or download the data into Excel by clicking the icon.

**Organization information**

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Employment Demographics</td>
<td><strong>HR Partner, HR Lookup, Senior HR Partner, Management Partner, Hire Initiator</strong></td>
<td>This report shows the job classifications, gender, ethnicity, age, citizenship and military staff for staff within an HC or SUBD supervisory organization.</td>
</tr>
</tbody>
</table>

1) In the search box ![enter search text](image), type **Employment Demographics** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) In the **Organization** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the ![folder](image) to see a list of all of the organizations in which you hold the role to run this report. Select only one supervisory organization.

4) If you want to include subordinate organizations, click the check box to do so.

5) If you want to include managers, check the box to do so.

6) If you want to view only transactions for one or more employee types (e.g., regular, fixed term, student hourly, etc.), select which employee types you want to see in the summary.

7) Because Cornell is not using contingent-worker fields, the contingent-worker type will not populate with any choices.

8) Click **OK**. The report appears.
9) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon, view a bar chart by clicking the icon, or download the data into Excel by clicking the icon.

Reports that monitor compensation and costing allocations

These five reports will help you to manage compensation and costing allocations for the workers that you support.

Compensation reports

<table>
<thead>
<tr>
<th>Report name</th>
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</thead>
<tbody>
<tr>
<td>Compensation Spreadsheet</td>
<td>HR Partner, HR Lookup, Senior HR Partner, Management Partner, Hire Initiator, Comp Finance Partner, Finance Look-up, Manager</td>
<td>This report shows compensation information about workers in the supervisory organization(s) you support: view the worker’s name, hire date, position, comp grade and profile, pay ranges, total salary and allowances, compa-ratio, and active compensation plans.</td>
</tr>
</tbody>
</table>

1) In the search box, type Compensation Spreadsheet and then click the Search button, or press the Enter key. The Search Results pane displays.

2) Select the report.

3) Select the effective date.

4) In the Organizations field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the to see a list of all of the organizations in which you hold the role to run this report. Select only one (or more) supervisory organization(s).

5) If you want to include subordinate organizations, click the check box to do so.

6) Click OK. The report appears.

7) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon, view a bar chart by clicking the icon, or download the data into Excel by clicking the icon.
<table>
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<tr>
<th>Report name</th>
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</thead>
<tbody>
<tr>
<td>Compensation Plan Expected End Date Audit</td>
<td>HR Partner, HR Lookup, Senior HR Partner, Management Partner, Hire Initiator, Comp Finance Partner, Finance Look-up, Manager</td>
<td>This report shows compensation information and plan end dates for workers in the supervisory organization(s) you support: view the worker’s name, position, compensation plan, amount, frequency, plan start date, and plan end date.</td>
</tr>
</tbody>
</table>

1) In the search box, type **Compensation Plan Expected End Date Audit** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) Check the box if you want to include subordinate organizations.

4) In the **Organizations** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the **to see a list of all of the organizations in which you hold the role to run this report. Select only one (or more) supervisory organization(s).**

5) If you desire, select a start and/or end date: by doing so, you will limit your search results to only those plans that started or ended on the date(s) you select, *if* those plans were entered by the **View As Of** date that you enter next.

6) Select the **View As Of** date that you are interested in. For example, if you are interested in plans that were entered as of today, enter today’s date: you will see plans that were in the system as of (or before) today.

7) Click **OK**. The report appears.

8) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter **icon, view a bar chart by clicking the **icon, or download the data into Excel by clicking the **icon.
### Costing Allocation (i.e., labor distribution) reports

<table>
<thead>
<tr>
<th>Report name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>All Workers Costing Allocations</td>
<td>Compensation Finance Partner, Finance Lookup Partner, Management Partner, HR Partner, Senior HR Partner</td>
<td>This report shows the costing allocation and distribution for academic, regular, temporary and student workers, including regular pay and allowances. <em>(Note: currently, this report only lists costing overrides, not the default costing.)</em> By default, the report sorts by the first name, but you can click on any column header to perform different sorting.</td>
</tr>
</tbody>
</table>

1) In the search box, type **All Workers Costing Allocations** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report. The report appears.

3) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon, or download the data into Excel by clicking the icon.

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<tr>
<th>Report name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Worker Costing Allocation by Employee</td>
<td>HR Partner, Senior HR Partner, HR Lookup, Payroll Partner, Payroll Administrator</td>
<td>This report shows position, costing allocation, and percentage distribution for any selected staff member. <em>(Note: currently, this report only lists costing overrides, not the default costing.)</em> This report is run for individual employees and is not defined by a HC or SUBD organization.</td>
</tr>
</tbody>
</table>

1) In the search box, type **CU Worker Costing Allocation by Employee** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) In the **Employee** field, type all or part of the employee’s name or click the icon to see a list of all of the employees you support. Select one (or many) employees.

4) Click **OK**. The report appears.

5) View the information in Workday, sort the information by clicking on the column headers, filter
the information by clicking the filter icon, view a bar chart by clicking the icon, or download the data into Excel by clicking the icon.

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<tr>
<th>Report name</th>
<th>Roles that can view it</th>
<th>Information the report offers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll Costing by Organization</td>
<td>Compensation, Finance Partner, HR Lookup, Senior HR Partner, HR partner, Management Partner</td>
<td>This report shows which workers are associated with a particular cost center.</td>
</tr>
</tbody>
</table>

1) In the search box, type **Payroll Costing by Organization** and then click the Search button, or press the Enter key. The Search Results pane displays.

2) Select the report.

3) In the **Organization** field, which is NOT like other organization fields in that it is not for a supervisory organization, type all or part of the **Cost Center** name or account number or click the icon to see a list of all of the cost centers. Select only one (cost center).

4) If you choose to filter your search by pay component (e.g., auto allowance, FWS, or many other earning choices), select the **Pay Component Group** field.

5) Enter an effective date.

6) Click **OK**. The report appears.

7) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon, view a bar chart by clicking the icon, or download the data into Excel by clicking the icon.
Reports that help you manage your business-process-related information

Several reports manage BP-related information: two that you might use frequently are **Employees on Leave** and **Terminations**.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Employees on leave</td>
<td><strong>Management Partner</strong>, <strong>HR Partner</strong>, <strong>Compensation Finance Partner</strong>, <strong>Manager</strong>, <strong>HR Lookup</strong>, <strong>Senior HR Partner</strong>, <strong>Student Employment Management Partner</strong>, <strong>Student Employment Partner</strong></td>
<td>Shows employees on (and returned from) leave, their position, the type of leave, and the dates of the leave. Suggestion: Managers and/or Management Partners should run this report on a monthly basis to track staff leaves and determine future business processes and/or allowances based on leave type.</td>
</tr>
</tbody>
</table>

8) In the search box, type **Employees on Leave** and then click the Search button, or press the Enter key. The Search Results pane displays.

9) Select the report.

10) In the **Organization** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the ![check](icon) to see a list of all of the organizations in which you hold the role to run this report. Select one (or many) supervisory organizations.

11) If you want to include subordinate organizations, click the check box to do so.

12) Enter the start and end dates.

13) Choose whether to include employees who have returned from leave and/or pending leave events.

14) Click **OK**. The report appears.

15) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter ![filter](icon) icon, view a bar chart by clicking the ![chart](icon) icon, or download the data into Excel by clicking the ![download](icon) icon.
<table>
<thead>
<tr>
<th>Report name</th>
<th>Roles that can view it</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Terminations</td>
<td>Hire Initiator, Management Partner, HR Partner, Manager, HR Lookup, Senior HR Partner</td>
<td>Shows employees who have been terminated: this report does not show expected end dates; instead, it shows employees who actually have been terminated or have a future-dated termination that has successfully completed.</td>
</tr>
</tbody>
</table>

1) In the search box, type **Terminations** and then click the **Search** button, or press the **Enter** key. The **Search Results** pane displays.

2) Select the report.

3) In the **Organization** field, type all or part of the supervisory organization (or the manager’s name who owns the supervisory organization) or click the **to see a list of all of the organizations in which you hold the role to run this report.** Select one (or many) supervisory organizations.

4) If you want to include subordinate organizations, click the check box to do so.

5) Enter the start and end dates.

6) Choose whether to include employees who have returned from leave and/or pending leave events.

7) Click **OK**. The report appears.

8) View the information in Workday, sort the information by clicking on the column headers, filter the information by clicking the filter icon, view a bar chart by clicking the icon, or download the data into Excel by clicking the icon.