Manager Job Aid
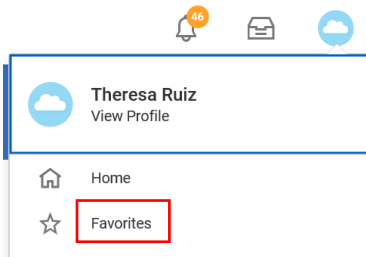
REPORTS

NOTE: WORKDAY IS CONSTANTLY UPDATING THEIR TOOLS, SO THIS JOB AID
MAY NOT REFLECT EXACTLY WHAT YOU SEE IN WORKDAY.

Reports

More than 100 reports are available to managers. They can be found by clicking the Profile icon and selecting **Favorites.**

To add a favorite report, click on **Manage Favorites** (below the report list).

Then search for your favorite reports in the **Favorite Custom/Standard Reports** box.

NOTE: Reports you've scheduled or large reports that you've elected to run in the background (by clicking the *Notify Me Later* option) can be viewed by clicking the **Profile** icon and selecting **My Reports**. Some reports will auto-delete after 5 days.

You can also use the search bar to find the following standard and custom reports.

   a. All Associate Transactions (able to search all manager's transactions in Workday)

   b. Anniversary/Birthday Report

   c. CMP Ratings Report

   d. Emergency Contact Report

   e. Headcount & Open Position Analysis (Standard Report)

   f. Incentive & One Time Payment (Standard Report)

   g. I-9 Details Report

   h. *Insurance/Driver's License Tracking*

   i. My Org Chart (Standard Report)

   j. Onboarding Status Summary (Standard Report)

   k. Organization Members (Standard Report)

   l. Overlap Workers (Standard Reports)

   m. Position Summary - Filled positions, pending offers (Standard Report)

   n. Promotion, Demotion, Transfer Detail Report

   o. Retention Headcount

   p. Union Associates

   q. Vehicle Information Report

   r. Worker's Job History (Standard Report)

   s. Workers on Leave (Standard Report)

   t. Workers Returned from Leave (Standard Report)

   u. Workforce Report

NOTES:

Use the blue hyperlinks inside a report to filter the results.

Reports are built into Workday and cannot be edited. However, you can export them to Excel to remove unwanted columns. If the report is one that you will run often and needs customization, or if you cannot find the report you need, reach out to HR Ops and request that a report be built for you.

Reports

HOW TO RUN REPORTS – EXAMPLE

To show you how reporting works in Workday, here are instructions for running the Anniversary/Birthday Report.

1. Type **Anniversary/Birthday Report** into the search bar and then select it from the search results.

   Anniversary/Birthday Report

2. Search for and select your organization in the **Organizations by Type** field.

   Organizations by Type   * [≔]

3. Check the box next to **Include Subordinate Organizations**.
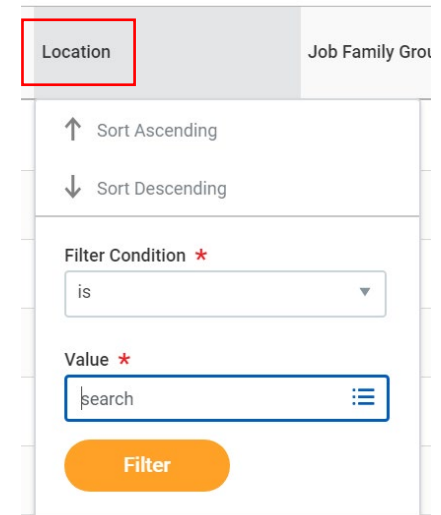
   Include Subordinate Organizations   ☑

4. Click **OK**.

5. Click on column titles to sort or add filters.

   After setting the Filter Conditions and choosing the Values, click the **Filter** button.

6. You can export the report to Excel, apply filters, view the report as a chart or set grid preferences by clicking the icons in the upper right corner of the report.

   Location   Job Family Grou

   ↑ Sort Ascending

   ↓ Sort Descending

   Filter Condition *
   [is   ▾]

   Value *
   [search   ≔]

   [Filter]

> **NOTES:** If there is a delay to run a report, Workday will show a *Notify Me Later* button. This report will appear in your notifications. They can also be viewed by clicking the **Profile** icon and selecting **My Reports**.