Reporting: Managers

Objective: This guide lists Workday reports recommended for Managers and includes information about both reports and dashboards.

Workday has over 250 standard reports in addition to Yale custom reports. A report name ending with "Yale" indicates that the report has been customized for Yale.

For an overview of the reporting tools and features available in Workday, see the **Reporting: Tools and Features** training guide.

- **Compensation**
  - Compensation Spreadsheet—Yale
  - Estimated Compensation for a Period Report
  - One-Time Payments—Yale
- **Delegation and Roles**
  - My Delegations
  - Role Assignments for Supervisory Organizations—Yale
- **Employee Contacts, Demographics and Diversity**
  - Active Employees—Yale
  - Birthdays for This Week and Next
  - Employee Emergency Contacts—Yale
  - Employment Demographics—Yale
- **Headcount, FTEs and Positions**
  - Headcount and FTE by Month—Yale
  - Job Requisitions—Yale
  - Open Position Summary
- **Hires and Terminations**
  - Fiscal YTD Hires—Yale
  - Staffing Activity Summary
  - Terminations—Yale
- **Job Changes**
  - Comp & Job History from a Previous System—Yale
  - Worker Change History Report—Yale
- **Onboarding**
  - Form I-9 Process Status Worklet
  - Onboarding Status Summary Worklet

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- **Organizations and Charts**
    - My Team Worklet – Org Chart Reports
- **Dashboards**
    - Workforce Planning Dashboard

Run a Report

From the Workday Landing Page:

1. Click in the Search bar, type the **Report Name** of the report you wish to run, and hit enter.

Note: See table above to determine the exact **Report Name** to enter.

2. Select the report.
3. In the **Organization** field, type the name of the Supervisory Organization (or the manager's name who owns the Supervisory Organization) and select the Supervisory Organization for which you want to run a report.
4. If applicable, enter all the appropriate information in the other prompt fields that appear.
5. Click **OK.**
6. If you wish to adjust column width, sort data, filter data, export to excel, create a chart, drill down for information, save as a PDF or print report, schedule a report, or add a report to the favorites worklet, see **Reporting: Tools and Features** training guide.

View Dashboards

Dashboards are designed to simplify navigation by placing key management information for interactive analysis in a single location.

The dashboard worklet will appear on the home screen of those with a business need to view various reports and charts.

Different Dashboards have been created for different audiences. The list of reports housed in your Dashboard are reports recommended for your role.

Yale Custom Reports

The Yale Custom Report worklet displays a list of reports ending with "Yale" indicating that these reports have been developed and customized for Yale.

At this time only the Workday reporting team has the ability to create custom reports. If there is a report critical for your work that is not currently available, please email your needs to: employee.services@yale.edu.

If you do not have access the information in a report, then you will not be able to run that report.

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Report Name	Roles that can view it	Description
Active Employees—Yale	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Compensation Partner/Associate • Manager • HCM View-Only	View basic demographic information regarding the active employees within the organizations you support. ***Notes for User*** • Required prompt: Organizations • Optional prompts: Include Subordinate Organizations, Worker Type, Employee Type, Contingent Worker Type, Job Category
Birthdays for This Week and Next	• Strategic Business Partners • Business Partners • HR Partner • Employee Relations Specialist • Department HR Support Specialist • HCM View-Only • Manager	View a list of worker birthdays in the next two weeks. Details include the date of the next birthday and the worker name. ***Notes for User*** • Required prompt: none • Optional prompt: none
Comp & Job History from a Previous System—Yale	(Almost all roles can run this report) • Strategic Business Partners • Business Partners • Compensation Partner/Associate • HR Partner • Employee Relations Specialist • Department HR Support Specialist • HCM View-Only • Recruiter (All varieties) • Staffing Associate	This report pulls the past five years of job and compensation history from Oracle for an individual. ***Notes for User*** • Required Prompt: Employee Name
Compensation Spreadsheet—Yale	• Business Partner • Compensation Partner/Associate • HR Administrator • HR Partner • Manager • Strategic Business Partner • Employee Relations Specialist • Department HR Support Specialist • HCM View-Only	For one or more organizations that you manage or support, and optionally their subordinates, view each worker's compensation package, whether the compensation is within guidelines, or view their position in range. Enables you to manage compensation at a broad level for an organization. Additional details include hire date, position, total base pay, total salary, allowances, base pay quartile, and compensation plans. As a related action on the worker, you can request compensation changes. ***Notes for User*** • Required prompt: Organization • Optional prompts: View as of, Include Subordinate Organizations

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Report Name	Roles that can view it	Description
Employee Emergency Contacts—Yale	(Almost all roles can run this report) • Strategic Business Partners • Business Partners • Compensation Partner • HR Partner • Employee Relations Specialist • Department HR Support Specialist • HCM View-Only • Recruiter (All varieties) • Staffing Associate • Manager	View a worker's emergency contacts, including the contact person's name, relationship, contact priority, languages spoken, phone number, and email address. ***Notes for User*** • Required prompt: Organizations • Optional prompts: View as of, Include Subordinate Organizations
Employment Demographics—Yale	(Almost all roles can run this report) • Strategic Business Partners • Business Partners • Compensation Partner/Associate • HR Partner • Employee Relations Specialist • Department HR Support Specialist • HCM View-Only • Recruiter (All varieties) • Staffing Associate • Manager	View employee demographic details, such as age, gender, and ethnicity by organization. Includes compensation information. ***Notes for User*** • Required prompt: Organization • Optional prompts: Include Subordinate Organizations, Worker Type, Employee Type, Contingent Worker Type, and Job Category
Estimated Compensation for a Period Report	• HR Partner • Compensation Partner/Associate • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Manager • HCM View-Only	View the estimated compensation for employees in an organization for a specified period of time. Values will be displayed in the currency selected for the report. ***Notes for User*** • Required prompts: Currency, Organizations, Start Date and End Date • Optional prompts: Include Subordinate Organizations

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Report Name	Roles that can view it	Description
Fiscal YTD Hires—Yale	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Manager • HCM View-Only • Compensation Partner • Recruiter(s) • Staffing Associate	View a list of fiscal year to date new hires to the University in the organization (either supervisory or home organization) selected. This report includes compensation and other demographic information about the new hire. Internal transfers are not reflected on this report. ***Notes for User*** • Required prompt: Organization
Form I-9 Process Status Worklet	• Managers • Matrix Managers • HR Partners • Business Partners • Strategic Business Partners • Department HR Support Specialist • Employee Relations Specialist • HCM View-Only	The I-9 Process Status Worklet displays summarized information about the I-9 Forms for your workers. It displays counts of "Overdue", "Assigned to Employee", "In Document Review", "Pending Finalization", and "Recently Finalized" I-9 Forms.
Headcount and FTE by Month—Yale	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Recruiter(s) • HCM View-Only • Manager	View an interactive chart of headcount and FTE counts by fiscal year and month. Chart can be filtered by employee type, job category, job family, supervisory org, etc. Drill into counts for additional detail data by various dimensions. ***Notes for User*** • Required prompt: None • Optional prompts: Time Series Start and End Date
Job Requisitions—Yale	• HR Partner • Business Partner • Strategic Business Partner • Recruiter(s) • Staffing Associate • Compensation Partner/Associate • Manager • Department HR Support Specialist • Employee Relations Specialist	View a list of job requisitions created within a specified time frame and by requisition status. Details include the supervisory organization, status, the date the requisition was entered, the recruiting start date and target hire date, and the event by which the position was filled. ***Notes for User*** • Required Prompts: Job Requisition Status • Optional Prompts: Job Requisition Entered On or After, Organization

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Report Name	Roles that can view it	Description
My Delegations	• Employee Self-Service	View Current Delegations with a button to request delegation changes, Current Task Delegations, Delegation History, Delegated Tasks, and Business Processes allowed for Delegation. Enables you to monitor and manage your delegated tasks. ***Notes for User*** • Required prompt: none • Optional prompt: none
My Team Worklet-Org Chart Reports	• Managers • Matrix Managers	The My Team Worklet is convenient for managing your team. With this Worklet you can initiate business processes (requisition, hire, terminate, promote, etc.) as well as view reports and org charts that will provide you with information about your team (demographics, emergency contacts, headcount, etc…
Onboarding Status Summary Worklet	• Managers • Matrix Managers • HR Partners • Business Partners • Strategic Business Partners • Department HR Support Specialist • Employee Relations Specialist • HCM View-Only	The Onboarding Status Summary Worklet displays summarized information about onboarding activities in the supervisory organizations that you support. It displays Onboarding Activities "Not Started", "In Progress", "Completed", and "Total metrics for each supervisory org you manage.
One Time Payments—Yale	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Compensation Partner/Associate • HCM View-Only • Manager	View approved one-time payments (excluding benefits-related payments and certain one-time student and PDF payments). You can narrow your report results to a specific date range or organizations, or any combination of these criteria. Report details include employee ID, job category, supervisory organization, date of the payment approval, payment amount, type of compensation, and any additional information captured during the process. ***Notes for User*** • Required prompt: Organization • Optional prompt: Include Subordinate Organizations

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Report Name	Roles that can view it	Description
Open Position Summary	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Recruiter(s) • Manager • HCM View-Only	View a staffing summary for a specific supervisory organization that uses position management as the staffing model. Summary includes the number of current workers, pending offers, future hires, and Q1 to Q4 totals for a specific organization and the next level down in the organization hierarchy, which is an accumulation of all the organizations below it. You can drill down to see the details for each number. ***Notes for User*** • Required prompt: Organization • Optional prompt: Include Employee, Include Contingent Worker
Role Assignments for Supervisory Organizations—Yale	(Almost all roles can run this report) • Strategic Business Partners • Business Partners • Compensation Partner • HR Partner • Employee Relations Specialist • Department HR Support Specialist • HCM View-Only • Recruiter (All varieties) • Staffing Associate • Manager	This report displays the role assignments for a supervisory organization and all its subordinates. The report will display one line per supervisory organization and will list the worker names that holds the roles for that organization. ***Notes for User*** • Required Prompt: none • Optional Prompt: Organization
Staffing Activity Summary	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • HCM View-Only • Manager	View a summary of all staffing activity for both primary and additional jobs in an organization for a given time period or date range. Enables you to view the total number of staffing transactions such as hires, terminations, and transfers, as well as to see beginning and ending headcount over a specified time period. ***Notes for User*** • Required prompts: Organization, Time Period / Relative To or Date Range From / To. • Optional prompts: Include Subordinate Organizations, Include Pending Activity, Include Future Activity, Show Organization Role

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Report Name	Roles that can view it	Description
Terminations—Yale	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Recruiter(s) • HCM View-Only • Manager	View a list of terminations by organization (either supervisory or home organization) and specified time frame. Detail includes employee name, employee type, job category, job profile, termination date and reason, as well as other demographic information. ***Notes for User*** • Required prompt: Organizations • Optional prompts: Starting and Ending Termination Date
Worker Change History Report—Yale	• HR Partner • Employee Relations Specialist • Department HR Support Specialist • Business Partner • Strategic Business Partner • Recruiter(s) • HCM View-Only • Manager	View a summary of worker changes in one or more organizations. Enables you to analyze staffing and compensation changes by person within organizations. The work history includes current and proposed changes to positions, managers, business sites, compensation grades, and base pay amounts. ***Notes for User*** • Required prompt: Organizations • Optional prompts: Include subordinate organizations, Include Managers, Start Date and End Date
Workforce Planning Dashboard	• Manager • Matrix Manager	View an interactive display of reports containing a variety of information such as current headcount and open positions, workers by home organization, and business processes that are either in flight or awaiting action by you.