Workday Reporting at UNLV:

Did you know that Workday delivers over 1,500 reports, all with interactive functionality to get to the data you need? Additionally, we have the ability to build customized reports that address our unique business needs. This provides us with greater access to employment data and analytics than ever before!

Have you been running reports? What's your favorite one? You can run a report on as needed basis or you can schedule a report to run on a recurring basis, delivered to you.

Workday gives employees the ability to run a variety of reports based on their role. Results can be filtered by column and exported to Microsoft Excel for additional sorting, formatting, and analysis. Report security is complicated; you might have access to a report, but when you open it there might not be any results. This is because you must both have access to the report AND the data the report is providing. Additionally, there are multiple reports that provide what feels like the same data. This is because Workday gives us multiple ways of looking at the same information, including built in filters.

There are two types of reports: Standard (delivered) Reports and Custom Reports. Within NSHE, Report Writers have agreed to a naming convention for Custom Reports: [Description] - XXX - CR (ZZZZ).

- **XXX** is the report's General Area, and includes acronyms like HCM, PAY, and FIN
- **CR** is an acronym for Custom Report
- **ZZZZ** is the acronym for the organization that created the report (example: UNLV)
  Note: If you see **WIP** as part of the report name, it is a Work In Progress

If you haven't utilized reports, please view the instructions on how to add a report worklet to your Workday home page, how to schedule a recurring report, and a listing of 10 HCM reports that we recommend running on a regular basis.

How do I add a Report Worklet to my Workday Home Page from the Home page?
1. Click the Settings icon in the upper right-hand corner of the Home page. The Configure Worklets page displays.
2. Click the Plus icon to add the Report worklet.
3. Click the Prompt icon and type in **Report** - Press Enter.
4. A listing of matching options will display. Click on the Reports option to add the worklet.
5. Click OK > Done.

How do I schedule a Recurring Report?
1. Click the **Reports** worklet. The Reports worklet displays with two sections.
2. Under the **Tools** Category, click on **Schedule Report** > The Schedule a Report screen is displayed.
3. Enter the **Report name** or click on the Prompt icon, to look up the report.
4. Click on the drop-down arrow in the **Run Frequency field** to choose from the listing of valid recurrence options.
5. Click on OK.
6. Click on the tab to enter information on the details of date information and what you want the report to include.
7. Click on the tab to specify other recurrence information.
8. Click on the tab to choose whether you want the output to be in **Excel** or **.pdf** format. Click on OK.
9. A Document Available notification will then be delivered to your Notifications area of Workday.

How do I Freeze, Hide, and Reorder Columns in my Workday Report?

- To **Filter on Multiple Columns** - Click on the **column preferences** grid icon, located to the right and just above your report.
- To **Freeze a Column**, drag the **title** to the **dotted freeze box** located at the top of the list. Drag column titles in the dialog box to reorder them.
- To **Hide a Column**, click its checkbox.
- To **Reset your Report View**, click on the **column preferences** grid icon and select **reset**.

List of HCM Reports:

1) AAP Employee Data - HCM - CR (NSHE)
   Use to review employee hire information

2) Open Positions
   View a summary of open positions in an organization. Enables you to audit the total number of available positions and hours, as well as the number of pre-hires for each position. Helpful when you don't remember what positions have been created or want to see all open positions in a single view.

3) Employees with End Employment Date in the Past or next 60 days - HCM - CR (NSHE)
   Use to review Past or Upcoming end empl dates to coordinate extensions

4) Manage Job Requisitions
   View all open, pending approval, frozen, and closed job requisitions. Details include job requisition and the total number of candidates who have applied. Also included are the days the requisition has been open, the requisition status, supervisory organization, job profile, number of available openings, recruiting start date, target hire date, number of active candidates, and offer status.

5) Candidate Pipeline
   View recruiting sources according to job requisitions and the number of active candidates associated with the steps within the recruiting process

6) Onboarding Status – Summary – HCM – SC (NSHE)
   Shows where your new hires are in their on-boarding process (not started, in progress, in progress > 1 day, completed)
   Use to identify action steps you might take to move the process forwards, as needed.

7) Employees with Period Activity Pay including Costing Detail – HCM – CR (NSHE)
   Detailed report including costing detail of employees with Period Activity Pay

8) Terminations
   View a list of all employee terminations in one or more of your organizations for a given time period or date range. Enables you to view termination events by date and to see a subset of termination details

9) Audit - Workers with no Time Entered
   View workers that did not submit time off

10) Compensation Plan Assignments with Actual End Dates
    View employees with the compensation plan that have an actual end date

New Pre-Hire SSN Check – this report is no longer active as it's no longer needed.

List of Financials Reports:

1) Manager Balance - Budgeted by Ledger Account - FIN - CR (NSHE)
    a. Organized by Ledger account – used to manage Budgeted accounts – Other Manager Balance Budgeted reports organize the data in different ways, like cost center or program worktags
2) Manager Balance - Balance Controlled By Ledger Account - FIN - CR (NSHE) -
    a. Organized by Ledger account – used to manage Self Supporting accounts – Other Manager Balance Controlled reports organize the data in different ways, like cost center or program worktags
3) Payroll Accounting Summary by Employee and Fiscal Period - FIN - CR (NSHE)
    a. Shows payroll accounting results by employee
4) Payroll Accounting Results by Pay Period and Position Organization
    a. These reports will return payroll journal lines based on a users security to the worktags on the journal line itself. Users will only see payroll expenses for the units, cost centers, programs, etc that they have been granted access to. This report is run by pay period and organization. Report will return "In Progress" payroll results as well as completed. You can run this for In Progress payroll and filter on FD892 in the Worktags prompt.
5) Worker Active Costing Report - FIN - CR (NSHE)
    a. Run to review employee's costing allocations
6) My Award Budget to Actuals by Grant – FIN-CR (NSHE)
    a. Organizes Budget to Actuals Data by Grant
7) My Award Budget to Actuals by Ledger Account -FIN-CR (NSHE)
    a. Organizes Budget to Actuals Data by Ledger Account Summary
8) List of My Grants – FIN-CR (NSHE)
    a. Provides list of Grants where the user has a security role assignment.