

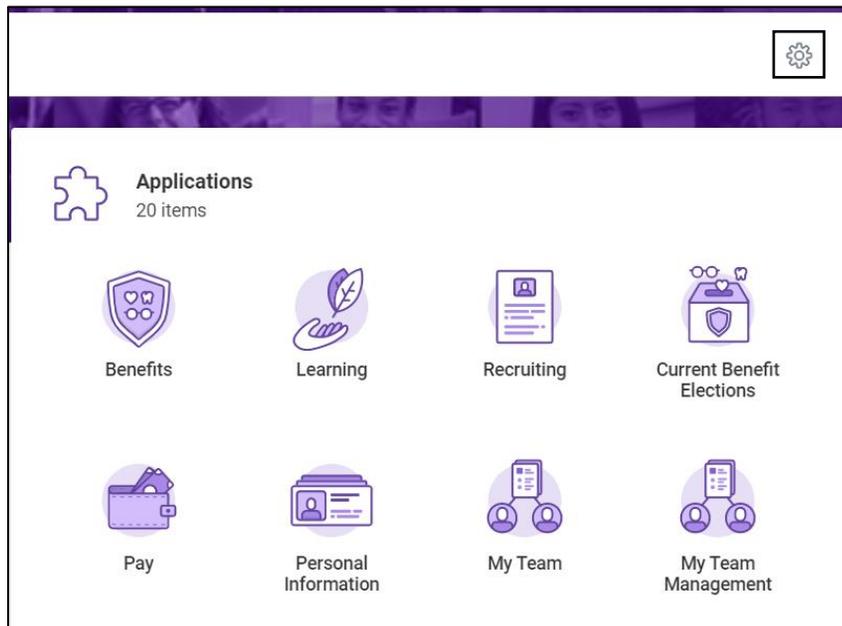
### Overview

This job aid explains how to access, generate, and navigate reports. Most reports of relevance to Managers can be found in the My Team Management application, although there are reports and on-demand data within most home page applications (icons). You can also search for a report by name by entering a keyword in the Search field. Based on your security access, you will only be able to see certain information about your direct reports and colleagues.

### Reports Application

Access and generate reports from the Reports application.

1. From the home page, click the **gear icon** to the right of your name.



2. The Configure Worklets screen displays.
3. In the Optional Worklets section, click the **+ icon**.
4. In the Worklet field, search for and select Reports.  
**Note:** An orange alert may appear regarding Workday mobile. Ignore this error and continue with the steps below.
5. Click **OK**.
6. Click **Done**.
7. Click the **Reports** application to view and act on relevant reports in Workday.

## Access & Generate Reports

Access and generate reports from My Team Management or Workday Search.

1. From the Workday home page, click the **My Team Management** icon.
2. In the View column, click **Compare Team**.
3. Review the **Organization** and click **OK**.
4. Review the Job, Base Pay, Bonus information and more for your direct reports.

**Note:** From **Search**, type the report name (e.g., Compare Team). Report links contain the word 'Report' below the title. If prompted, fill out the required fields, and then click **OK**.

## Report Navigation

1. Below are some common report-related icons.

Icon	Description
	Download a PDF of report data.
	Export report data to Excel.
	Filter report data.
	Toggle charts on or off.
	Configure the chart format, e.g. pie, line, column, bar, area, or bubble.
	View the report in full screen mode.

2. Blue text in a report fields indicates a link that you can use to drill-down for additional information. To access more information, click the blue text or hover over the text to reveal the Related Actions icon.

Employee ID	Employee	Most Recent Hire Date	Position
W4900	<a href="#">Blake Reid</a> 	07/14/2021	<a href="#">P011741 Librarian II - Blake Reid</a>
W4901	<a href="#">Mason Chen</a>	07/14/2021	<a href="#">P011742 Public Safety Dispatcher - Mason Chen</a>

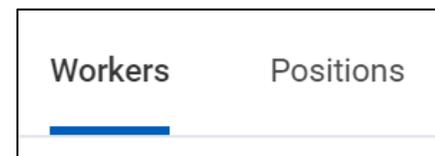
3. Reports display fields to set data prior to running. Click the empty field(s) and select the value(s) as applicable. Once you've set the filters and preferences click **OK** at the bottom of the screen.

Organizations \*  

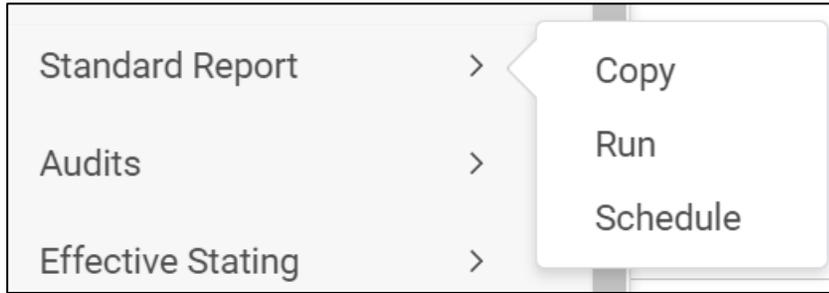
Include Subordinate Organizations

Include Managers

4. Reports provide tabs which display additional views. Below is an example of possible tabs; tabs will differ based on the report.



5. Reports display the Actions icon to the right of the report title. Click **Actions** > **Standard Report** > Select **Run** or **Schedule**.

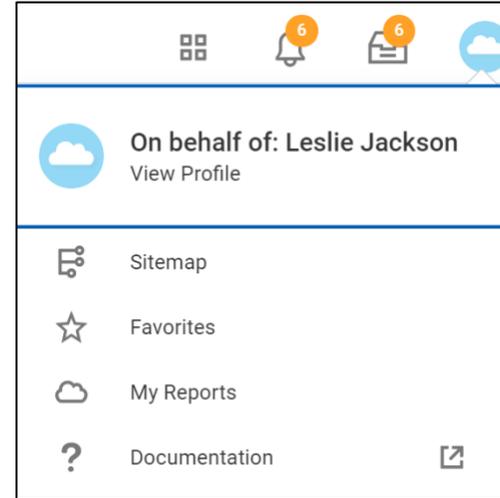


- If Scheduling a report, click the field and select a value from the drop-down list.

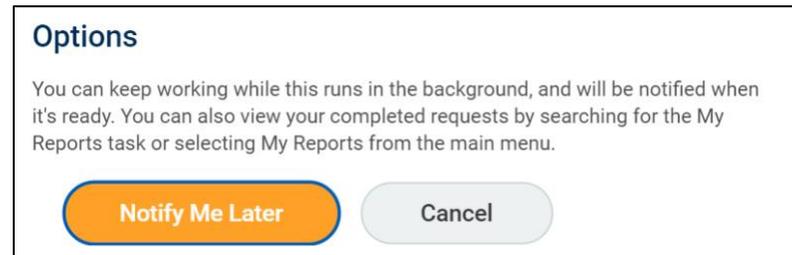
Report \*

Run Frequency \*

5. To access a scheduled report, click your **Photo/Cloud icon**.
6. Click **My Reports**.



**Note:** If a report requires a large amount of data to be loaded, then a pop-up displays a message that you can keep working while the report runs in the background and will be notified when the report is ready. Click **Notify Me Later** to continue working in Workday. When ready, a pop-up notification and a Workday notification appear.



### Common Manager Reports

Leverage the following reports as appropriate to support decision making in your organization.

Topic	Report Name	Description
Absence	My Team's Upcoming Time Off	Displays workers in your supervisory organization with approved time off in the next 7 days. Does not include workers on Leave of Absence or unapproved time off.
Compensation	Direct Reports Compensation Summary	View employee and contingent worker compensation for each direct report currently in your organization. Enables you to manage compensation at a broad level across your organization.
Compensation	Direct Reports Market Position	Provides Managers with a worklet to show how their direct reports compare to market data by job profile.
Financials	Find My Team's Cash Advances	Find cash advances for members of your team. Details for each report include the Spend Authorization Number, Spend Authorization Status, Spend Date, Spend End Date, Days after End Date, Cash Advance Requested Amount, and more.
Financials	Find My Team's Expense Reports	Find expense reports for members of your team. Details for each report include the expense report number, date, status, amount, currency, pay-to person type, and whether reports have been paid.
Financials	Banner-to-Workday Crosswalk Query	Use this report if you need to locate the previous Banner FOAPA (Fund, Organization, Account, Program, Activity) value and what the value is now called in Workday.
HCM	Outstanding Actions for My Direct Reports	This report shows the outstanding actions for a manager's direct reports.
Learning	MC Learning - My Team's Enrollments	Displays the team members' learning items and their status (not started, in progress, completed).
Learning	My Team's Peer Learning Content	This report provides managers with the peer learning content in stand-alone lessons created by their organization and any subordinate organizations.
Performance	My Team's Performance	View employee's performance reviews by progress, showing current action step if in-progress as

## Reports for Managers

### Workday Job Aid for Managers

	Reviews	well as ratings and period start and end date for review.
Performance	My Team's Review Ratings	View employee review ratings for workers on your team.
Performance	My Team's Goals	View your team's goals, either by employee or by goal. Filter your report for entire team or by supervisory organization. Enables you to add new goals, edit and copy existing goals, and link goals.
Recruiting	My Recruiting Jobs	View a list of job requisitions, the number of active candidates and detailed information about the job requisition. Required Prompts: Job Requisition Status, defaulted with Open and Filled.
Talent	My Team's Professional Development Goals	View your team's professional development goals.
Talent	Talent Review Status Summary	Managers can access the Talent Review Status Summary report to see key attributes of the talent review process for their team. Managers can take immediate action on assigned tasks. They also can see each employee's current performance rating and most recent potential assessment
Time Tracking	Review Time	Managers or timekeepers can review or approve time entry and time off for workers part of the same supervisory organization.
Time Tracking	My Team's Calculated Hours by Cost Center Worktag	The My Team's Calculated Hours by Cost Center report provides a breakdown of calculated hours by cost center for a manager's direct reports.
Time Tracking	My Team's Reported Time	Displays the reported time block hours for the employees in a supervisory organization. By default, the report displays reported time from the manager's first day to the last day of the current week.
Time Tracking	My Team's Schedule	View your team's schedule by worker and date.
Time Tracking	My Team's Scheduled Hours	Displays the total daily scheduled hours for your direct reports in the upcoming week.