Navigating Workday Academic Reports

- Workday-delivered profile reports
  - Academic Unit and Academic Unit Hierarchy
  - Worker profile – Job History

- Yale Custom Reports
  - Report Parameters/Prompts
  - Overview of Top Academic Reports
  - Scheduling Reports

- Addendum – Report Prompts
Workday delivered profile reports
Search prefix:
au = Academic Unit
auh = Academic Unit Hierarchy
Example: au: child study
<table>
<thead>
<tr>
<th>Business Process</th>
<th>Effective Date</th>
<th>Initiated On</th>
<th>Due Date</th>
<th>Completed On</th>
<th>Status</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Activity Pay: Driscoll, Brian (On Leave) - P305541 Summer Compensation</td>
<td>03/09/2022 12:06:44 PM</td>
<td>03/09/2022</td>
<td></td>
<td></td>
<td>In Progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preferred Name Change: Driscoll, Brian (On Leave)</td>
<td>03/08/2022 08:31:59 PM</td>
<td>03/08/2022</td>
<td>03/08/2022</td>
<td></td>
<td>Successfully Completed</td>
<td></td>
</tr>
<tr>
<td>Open Enrollment Change: Driscoll, Brian (On Leave) on 01/01/2022</td>
<td>01/01/2022 11:09:37 AM</td>
<td>11/28/2021 02:07:53 PM</td>
<td>12/10/2021</td>
<td></td>
<td>Successfully Completed</td>
<td></td>
</tr>
</tbody>
</table>
Yale Custom Reports
Yale Custom Reports

- Workday Home page contains link to Yale Custom Reports
- Search Bar can also be used to find a specific report
- Report Prompts and Filters
- Exporting Results to Excel
- Saving Reports to Favorites worklet
<table>
<thead>
<tr>
<th>Report</th>
<th>Report Description</th>
<th>Fields</th>
<th>Sharing Option</th>
<th>Security Groups permitted to View Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic - Named Professorships - Yale</td>
<td>Lists those that have been appointed to Named Professorships for a given Academic Unit (optional prompt). Sorted by Academic Unit, Rank, then Appointee.</td>
<td>Academic Appointee, Academic Appointment End Date, Academic Appointment Start Date, Academic Rank, Academic Unit, Move (5)</td>
<td>Specific authorized groups</td>
<td>Academic Business Partner, Appointment &amp; Promotions Specialist, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical), HCM View-Only Academic</td>
</tr>
<tr>
<td>Academic - New Faculty - Yale</td>
<td>This report lists Faculty or Other Academics that are ‘new’ based on the Hire or Continuous Service Date. Information for the primary appointment is displayed. The report is initially sorted by Academic Unit and then Appointee.</td>
<td>Academic Appointee, Academic Appointment End Date, Academic Appointment Reason (Simple), Academic Appointment Start Date, Academic Rank, Move (9)</td>
<td>Specific authorized groups</td>
<td>Academic Administrator, Academic Business Partner, Appointment &amp; Promotions Specialist, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical), More (9)</td>
</tr>
<tr>
<td>Academic - Non-Ladder Faculty Leaves By Term - Yale</td>
<td>This report provides a panoramic view of non-ladder faculty leave over an eight-year period: the past seven plus the future year.</td>
<td>Academic Appointee, Academic Appointments, Academic Appointments End Date, Academic Appointments Start Date, Academic Rank, Academic Unit, Academic Track Type, Academic Unit for Primary Academic Appointment, Appointment Identifier Type, Move (18)</td>
<td>Specific authorized groups</td>
<td>Academic Business Partner, Academic HR Support Specialist, Appointment &amp; Promotions Specialist, Business Partner, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical), More (12)</td>
</tr>
<tr>
<td>Academic - Non-Ladder Faculty Review - Yale</td>
<td>This report is intended to provide the Review Status of multi-year, non-ladder faculty and provides the deadline for the review.</td>
<td>Academic Appointment, Academic Appointments, Academic Appointment End Date, Academic Appointment Start Date, Academic Rank, Academic Unit, Move (11)</td>
<td>Specific authorized groups</td>
<td>Academic Administrator, Academic Business Partner, Appointment &amp; Promotions Specialist, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical), More (4)</td>
</tr>
<tr>
<td>Academic - Position and Rank Differ - Yale</td>
<td>This report lists those Academic Appointees having a Job Profile that is different from the Academic Rank (on the current primary appointment). The appointment information displayed is for the current primary appointment. The results are initially sorted by Academic Unit (of the primary appointment), then the Academic Appointee's last name.</td>
<td>Academic Appointee, Academic Appointments, Academic Appointment Academic Unit, Academic Appointment End Date, Academic Appointment Start Date, Academic Rank, Academic Unit, Move (10)</td>
<td>Specific authorized groups</td>
<td>Academic Business Partner, Appointment &amp; Promotions Specialist, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical), HCM View-Only Academic, More (8)</td>
</tr>
<tr>
<td>Academic - Tenure Track Faculty - Yale</td>
<td>Report returns the quantity of academics on the tenure track, and within the track the quantity of academics who are tenured.</td>
<td>Has Tenure</td>
<td>All authorized users</td>
<td>Academic Administrator, Academic Business Partner, Appointment &amp; Promotions Specialist, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical)</td>
</tr>
<tr>
<td>Academic - Terminated Employees with Appointments - Yale</td>
<td>Academic Appointees that have been terminated should no longer have active appointments. This report will list those Academic Appointees that have a termination date set, but have either current or future appointments where the appointment date needs to be updated to reflect the departure. Appointment end dates need to be updated if they are either blank or beyond the termination date.</td>
<td>Academic Appointee, Academic Appointment, Academic Appointment End Date, Academic Appointment Start Date, Academic Rank, Academic Track Type</td>
<td>Specific authorized groups</td>
<td>Academic Business Partner, Appointment &amp; Promotions Specialist, Faculty Affairs Coordinator (Academic), HCM Report Developer (Technical)</td>
</tr>
</tbody>
</table>
Date prompts are as of today’s date

Leaving prompts blank returns results based on Workday role security

Create and save a Filter for frequently used report prompt settings
- **Effective as of Date** prompt enables capturing results from a different timeframe.

- If running for a date in the past, use the *Return Active Workers* only check box to include (leave unchecked) or exclude (check box) Workers who are now terminated.
Overview of top academic reports
# Top Workday Academic Reports - Operational

<table>
<thead>
<tr>
<th>FREQUENCY</th>
<th>REPORT NAME</th>
<th>WHO SHOULD RUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly</td>
<td>My Business Processes in Flight - Yale</td>
<td>Any initiator</td>
</tr>
<tr>
<td>Monthly</td>
<td>Payroll Results Comparison – Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Monthly</td>
<td>Academic – Expiring Current Appointments - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>At least quarterly</td>
<td>Academic – Compensation Details – Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>At least quarterly</td>
<td>Academic QA – Expired Current Appointments – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each Term</td>
<td>Academic – Degrees – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each Term</td>
<td>Contingent Workers with Expiring Contracts - Yale</td>
<td>Business Partner or A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic – Employees on Leave, by academic Unit - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic – Ladder Faculty Review - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic – Non-Ladder Faculty Review – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually</td>
<td>Supervisory Organization Details – Yale</td>
<td>Business Partner or A&amp;P Specialist</td>
</tr>
</tbody>
</table>
# Top Workday Academic Reports - Informational

<table>
<thead>
<tr>
<th>FREQUENCY</th>
<th>REPORT NAME</th>
<th>WHO SHOULD RUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad hoc – as needed</td>
<td>Academic – View Current Appointments - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Ad hoc – as needed</td>
<td>Academic – Individual Primary or FJ Appointment History - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Ad hoc – as needed</td>
<td>Academic - Appointee Informational Extract - Yale</td>
<td>Business Partner or A&amp;P Specialist</td>
</tr>
<tr>
<td></td>
<td>Academic - Informational Extract with All Current Appointments – Yale</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Academic - Informational Extract with Primary Appointment – Yale</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Employment Demographics – Yale</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Employment Demographics as of Date - Yale</td>
<td></td>
</tr>
<tr>
<td>Ad hoc – as needed</td>
<td>Academic - Ladder Faculty - By Gender - Yale</td>
<td>Business Partner or A&amp;P Specialist</td>
</tr>
<tr>
<td></td>
<td>Academic - Ladder Faculty - By Race/Ethnicity – Yale</td>
<td></td>
</tr>
</tbody>
</table>
Scheduling reports
Scheduling a Report

- Select the Report Name
- Specify the Report Run Frequency
Report Criteria - the report prompts on a report run in real time

Date prompts - set to Value Type = Determine at Run Time

<table>
<thead>
<tr>
<th>Field</th>
<th>Value Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Structure Node</td>
<td>Specify Value</td>
<td></td>
</tr>
<tr>
<td>Academic Unit</td>
<td>Specify Value</td>
<td></td>
</tr>
<tr>
<td>Academic Track Type Category</td>
<td>Specify Value</td>
<td></td>
</tr>
<tr>
<td>Academic Rank</td>
<td>Specify Value</td>
<td></td>
</tr>
<tr>
<td>Appointment Type</td>
<td>Specify Value</td>
<td>Primary</td>
</tr>
<tr>
<td>Appointment Expires On or After</td>
<td>Specify Value</td>
<td></td>
</tr>
<tr>
<td>Appointment Expires On or Before</td>
<td>Specify Value</td>
<td></td>
</tr>
</tbody>
</table>
Scheduling a Report

- **Schedule Recurrence** screen will vary based on selected schedule frequency (e.g., Daily, Weekly, Monthly, etc).

- Select a **Run Time** that does not interfere with peak Workday usage (e.g., not during regular business hours 3:00 pm).

- You cannot schedule a process to run more than 5 times after the end of the next calendar year.
Schedule Recurrence screen will vary based on selected schedule frequency (e.g., Daily, Weekly, Monthly, etc)

Select a Run Time that does not interfere with peak Workday usage (e.g., not during regular business hours 3:00 pm)

You cannot schedule a process to run more than 5 times after the end of the next calendar year.
Scheduled Report Results

Access completed reports via
1) Notifications; or
2) My Reports from Photo/Cloud icon
Addendum – Report Prompts
All reports can be downloaded to Excel or as a PDF

Additional tools for working with live reports
Note: These do not change the results to be downloaded.
# Workday Academic Reporting

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Report Name</th>
<th>Who should run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly, or as needed</td>
<td>My Business Processes in Flight – Yale</td>
<td>Any initiator</td>
</tr>
<tr>
<td>Monthly</td>
<td>Payroll Results Comparison – Yale</td>
<td>Business Partner (BP)</td>
</tr>
<tr>
<td>Monthly</td>
<td>Academic - Expiring Appointments – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic - Compensation Details – Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic QA - Expired Current Appointments – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Academic QA - Missing Degrees - Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Bi-annually, Each term</td>
<td>Contingent Workers with Expiring Contracts - Yale</td>
<td>Business Partner</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Employees on Leave, by Academic Unit</td>
<td>Academic HR Support Specialist (AHRSS)</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Ladder Faculty Review – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually, in Spring</td>
<td>Academic - Non-Ladder Faculty Review – Yale</td>
<td>A&amp;P Specialist</td>
</tr>
<tr>
<td>Annually</td>
<td>Supervisory Organization Details - Yale</td>
<td>BP or AHRSS</td>
</tr>
</tbody>
</table>
My Business Processes in Flight – Yale

Frequency: *Monthly, or as needed*
Run by: *Anyone who initiates transactions*

Provides the status of transactions that you submitted and are still pending approvals.
Payroll Results Comparison – Yale

Frequency: *Monthly*
Run by: *Business Partner*

Good for checking that expected changes have taken place, as well as checking for unexpected changes or problems that need investigation.
Academic – Expiring Appointments – Yale

Frequency: Monthly
Run by: Appointments and Promotions Specialist

Run this report to list faculty who may need to be reappointed or may need to be terminated.

Provost’s Office perspective: All faculty who are not being reappointed within one year must be terminated.
If a reappointment has been entered and approved, a check will appear in the Re-appointment Exists? column.
**Academic - Compensation Details – Yale**

Frequency: *Bi-Annually, each term*
Run by: *Business Partner*

- Good for checking that individuals will be paid correctly.
- Can be used to check Annual Work Periods (AWP) Disbursement Plan Periods (DPP) and end dates on the various compensation plans.

Note: OFAS tries to check for end dates on all faculty whose DPP’s are less than 12 months.

- To ensure that benefits drop if applicable.
- To ensure that compensation does not resume unless approved and resubmitted.
Academic QA - Expired Current Appointments – Yale

Frequency: *Bi-Annually, each term*
Run by: *Appointments and Promotions Specialist*

Provost’s Office perspective: All faculty who are not being reappointed within one year must be terminated.

- Enter *Appointment Expires On or After 6/1/2010* and *Appointment Expires On or Before [current date]*
- Consult chair or dean to determine which faculty are not returning, then terminate those who are not.

- NOTE: Never end a primary appointment, else the individual will drop off of all academic reports. If the individual is not being reappointed, you need to terminate from the employee record.

For proper instructions on terminating faculty, reference the Workday guides in the “Termination/Separation” section ([http://workday.training.yale.edu/](http://workday.training.yale.edu/))
Example of prompts

**Academic QA - Expired Current Appointments – Yale**

Instructions:
This report lists those Academic Appointees having a current appointment with an Appointment End Date in the past. Includes all Academic Affiliates and Academic Appointees (even if inactive).

* Note: The default date range of appointment end date is between today and 30 days ago.

- **Academic Structure Node**
- **Academic Unit**
- **Track Type Category**
- **Academic Rank**
- **Appointment Type**
- **Appointment Expires On or After** (default: 06/01/2010)
- **Appointment Expires On or Before** (default: 04/02/2020)
- **EXCLUDE Academic Structure Node**
- **EXCLUDE Supervisory Organization**
Academic QA - Missing Degrees - Yale

Frequency: *Bi-annually, each term*
Run by: *Academic HR Support Specialist*

- Checks for faculty who are missing degree information
- Incredibly important for a variety reasons, such as
  - Institutional reporting, e.g. U.S. News and World Report
  - Accreditation process

- **Recommended order of run:**
  - Run ladder faculty (*Track Type Category = Ladder*)
  - Run for teaching faculty
    - (*TTC = Non-ladder Teaching and Professional Practice*)
  - Run for research faculty and postdocs
    - (*TTC = Research and Training*)
Academic QA - Missing Degrees - Yale

Example of prompts

Instructions
This report lists faculty and selected contingent workers whose degree information is missing. Use the Add Education task to submit the missing degree information for an individual.

Organization (incl subordinates)

Academic Unit (Primary Appt)

Track Type Category (Primary Appt)
X Ladder

Academic Rank (Primary Appt)

Tenure Status (Primary Appt)

Worker

Only Include Tenured?

Only Include Active Workers?
Contingent Workers with Expiring Contracts – Yale

Frequency: *Bi-annually, each term, or monthly if high volume*
Run by: *Business Partner*

Run for the highest supervisory org to which you have access. This is either your school dean or department chair.

- The default date is the last day of the next month, but this can be changed to a later date if you wish to anticipate future expiring contracts.
Instructions for ending contracts from this report

1. From the list of results, right click on a contingent worker.

2. From the pop-up menu, select “See in New Tab” to open the record in a new window. This will preserve your report results.
3. Click on the Actions button under the Business Title.

4. Hover over Job Change and select “End Contingent Worker Contract.”
Contingent Workers with Expiring Contracts – Yale

Instructions for ending contracts from this report (con’t)

5. The contract end date will default to the last day of the contract. There’s no need to change this unless a different date is known.

6. The reason code defaults to the only option.

7. Click Close Position.

8. Click Submit to commit the action.
Contingent Workers with Expiring Contracts – Yale

Instructions for ending contracts from this report

Run for the highest supervisory org to which you have access. This is either your school dean or department chair.

- Enter dates of *On Leave Between 7/1/20 And 6/30/21*.
- Verify the list of faculty on leave.
- Refer to the Workday guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off)*, if you need to return faculty from a leave or place them on leave.
  
  **Note:** If you need to place them on leave, verify that you have submitted the necessary supporting documents to OFAS.
Academic - Employees on Leave, by Academic Unit – Yale

Frequency: *Bi-annually, each term to verify faculty on leave*
Run by: *Academic HR Support Specialist*

Run for the highest supervisory org to which you have access. This is either your school dean or department chair.

- Enter dates of *On Leave Between 7/1/20 And 6/30/22*.
- Verify the list of faculty on leave.
- Refer to the Workday guide, *Leave of Absence: Absence/Relief Time – Academic (Time Off)*, if you need to return faculty from a leave or place them on leave.

**Note:** If you need to place them on leave, verify that you have submitted the necessary supporting documents to OFAS.
Academic - Employees on Leave, by Academic Unit – Yale
Links to Training Guides

• Reporting: Tools and Features
  • https://workday.training.yale.edu/training-materials/reporting-tools-and-features

• Reporting: Academic Reports
  • https://workday.training.yale.edu/training-materials/reporting-academic-reports