

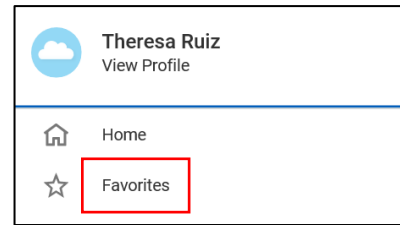


**HR Job Aid**  
**CUSTOM REPORTS**

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

# Custom Reports

More than 100 reports are available to the Human Resources team. 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).

Manage Favorites

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

Favorite Custom Reports

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. Compensation Changes Report
- e. EEO-1 Report
- f. Address & Emergency Contact Report
- g. Headcount & Open Position Analysis
- h. Incentive & One Time Payment
- i. I-9 Details Report
- j. US Employees with Form I-9 Expiring Documents-SYY
- k. Audit I-9 Receipts Report
- l. Insurance/Driver's License Tracking
- m. Matrix Assignments
- n. My Org Chart
- o. New Hires Report
- p. Onboarding Status Summary
- q. Organization Members (with Photo)
- r. Overlap Workers
- s. Position Summary (Filled positions, pending offers)
- t. Promotion, Demotion, Transfer Detail Report
- u. Terminations Report
- v. Retention Headcount
- w. Union Associates
- x. Vehicle Information Report
- y. Worker's Job History
- z. Workers on Leave
- aa. Workers Returned from Leave
- bb. Workforce Report

## NOTES:

Managers and HR will not be able to create their own reports. 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.

You must type in the exact name of each report, including dashes (i.e. I-9).

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.

# Custom Reports

## HOW TO RUN REPORTS - EXAMPLE

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

1. Type **Workforce Report** into the search bar and select it from the search results.

2. Search for and select an organization in the **Organization** field. You can select either the Supervisory Organization or the entire Operational Company.

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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 Gro
↑ 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**.