Guide to Workday reporting

Welcome to the guide to Workday reporting. This guide is designed to provide you with a background on how reporting in Workday works and where the data in your reports are pulled from.
Included in this guide is a glossary of reporting terms and list of key reports to help you find the information you require.

Contents

NOTE: Only information from the 9th of June 2020 will be found in Workday. *Historical data is not held in Workday*. Please see the section on Historical reporting for more information.

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1.   Background

Prior to the introduction of Workday, People & Culture reports were provided through the Discoverer platform using Ascender as the source of the data. More recently PowerBI was also introduced to provide bespoke reports to payroll for pay processing using Ascender data. With the introduction of Workday it is intended to transition the majority of post June 9, People and Culture reports, to be delivered through Workday, with Workday also being the source of data. During the transition period some reports may still be delivered through Discoverer and PowerBI reports to payroll will continue to be in place. Ascender remains the payroll system and pay transactional data will not be available in Workday.

Workday provides access to a range of reports via dashboards and reporting options within Workday. At the time of launch, People and Culture staff, Supervisors, and Budget Owners will have access to a number of pre-configured reports. Regulatory and business-critical reports were prioritised for availability upon Workday's launch, with the remaining reports being built over the coming months.

Supervisors, Senior Leaders and others who have specific reporting requests which are not being met by the reports currently available to them, are encouraged to contact their respective People & Culture Client Services team members for assistance or submit a Service One request.

Report data availability has been configured in accordance with appropriate compliance and data governance principles in mind to ensure that people information is only shared as required. People data reports which you may previously have had access to may be different in Workday. The security rights for your role may also be different in terms of what data you can see and you may find that the report is now only available directly through your supervisor.

2. Key Differences between Discoverer & Workday reports

1.Substantive and Concurrent Positions.

In Discoverer reports, a record would show whether the employee was in a substantive position or a concurrent (seconded) position.
In Workday reports, you will only see one record for the employee, their current position/s. Details of substantiative positions which they may return to at a future date from their seconded position are captured in "additional data" fields.

2. Higher Duties Allowance

Previously, the business process for managing higher duties was to place the employee in a higher duties position. Where higher duties is not treated as a secondment, the new business process is to allocate a higher duties allowance but their substantive appointment will remain the same.

3. Organisation Structure - CLevel v Academic Units

Ascender has used the concept of C-Levels to show organisation structure. e.g. Flinders University>Corporate>IDS or Flinders University>College of Business, Government and Law.
Workday used "Academic Units" to indicate organisation structure as well as appointments or affiliations to additional structures such as Affiliations (e.g teaching program, research section etc.)
An employee's primary academic appointment will be to an academic unit that is comparable to Ascender's Clevel3.
Academic units are applicable to both academic and professional staff, "academic unit" meaning a university structural unit – whether in a Portfolio or College. Academic appointments are an add on to facilitate operating model structures and are not synchronised to HCM which uses supervisory organisation for security management.

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2. Key Differences between Discoverer & Workday reports

4.Supervisory Organisation

This refers to the reporting lines, for example employee A, reports to Employee B, Employee B Reports to Employee C and so on.
The top supervisory org is ultimately the Vice Chancellor. Reports that allow data to be shown by Supervisor Org can also be enabled to show all supervisory organisations underneath the selected supervisory organisation. For example, if you ran a report to see all employees in Colleges of Nursing and Health Sciences, you can also select to run the report for the Supervisory Organisation : "VPED- College of Nursing and Health Sciences" and *include all subordinate organisations*. Note that for almost all instances in Workday, supervisory organisation is used to provide security over data in reports.

5. Position Management and Managers

In Workday, when the immediate supervisor's position is unoccupied, the worker is assigned to the "one up" supervisor. This means that at any point in time, a worker has someone who is directly responsible for their supervision. Filled and Vacant Positions report will show all positions and whether the position is occupied or open (vacant).

6. Worker vs Employee

A Worker can be an Employee or a Contingent worker, i.e. external contractor.
An Employee, a subset of Worker, is someone on Flinders payroll and includes Continuing, Fixed-Term and Casual staff.

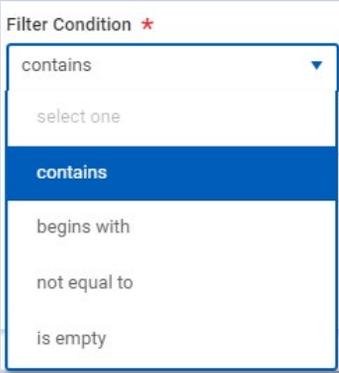## 2.   Key Differences between Discoverer & Workday reports

7. Affiliate

An affiliate is the term used for anyone affiliated with Flinders University such as non paid academics who may hold an academic status, volunteers and external contributors. Affiliates are not part of HCM, they are managed through Academic Appointments and are not visible in supervisory organisation views.
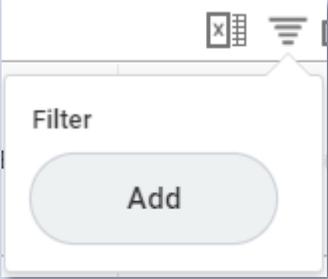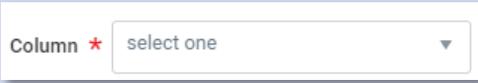
3. Report content

Each report is unique in its content although some reports may contain overlapping information. The data in Workday upon launch was migrated from existing data in the Ascender payroll system and Appian affiliations data. Going forward, Workday will continue to be populated with new people data and data changes, created from the personal information supplied by the individual employee, supervisors or the People and Culture business processes.

When generating reports, there are options to filter, remove columns, change the order the columns appear and more.

Field	Explanation
Sort Ascending ↑ Sort Ascending	Sorts the data found by earliest to latest in column selected.
Sort Descending ↓ Sort Descending	Sorts the data found by latest to earliest in column selected.
Filter Condition Filter Condition * contains ▼ select one contains begins with not equal to is empty	*Contains*: has the option included in the data results. *Begins with:* starts with *Not equal to:* does not equal to the option *Is empty:* holds no data values
Value (filter value) Value *	The word/ing to sort/filter your results by

3. Report content

Field	Explanation
Add Filter	Allows user to add a filter parameter to the results of report. Select Add and then select Column to filter by.
Toggle fullscreen viewing mode	Allows user to open or close the full browser window to show the report results.
Expand/collapse chart	Allows user to open a chart containing the results of the report.
Configure and view chart data	Allows user to change chart type and which axis data appears along with chart legend changes.
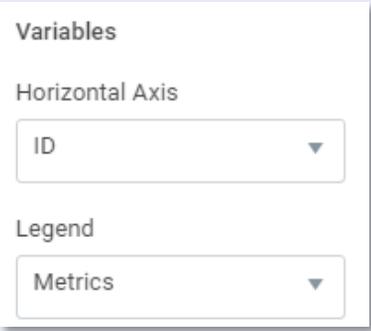
4. Report availability

Reports in Workday will only show you data, or a subset of data if the security permissions attached to your role provide viewing access for this data. You may find that you can run a report but it will yield no data if you do not have the necessary permissions to view this data, or it may be restricted to your supervisory organisation only. If there is a requirement within your position to access a subset of data but you do not have viewing access, please raise a Service One request for reporting access. Either your security permissions may be reviewed or your People and Culture Client Services team member may be able to provide you with the report.

To see a list of reports you have access to, you are able to search for *reports I can run* in the search bar and click on the result. This will show a list of a number of Workday delivered reports along with Flinders created reports. **It is important to note that not all listed reports are relevant to your role and results shown is dependant upon your security rights.** You can also type in the report name or part of the report name in Search and select the report from the search results.

Supervisors also have access to a Management Reporting Dashboard. This is a configurable workspace that gives supervisors quick visual insights into their workforce operations with a set of reports.

5. Report designing

If a report is desired and it is currently not available within Workday, you will need to provide relevant information in your request so the report can be considered for prioritising and creation and if approved for creation, designed correctly to suit your needs. Consider the following in your request:
- Who needs the data?
- Why is the report required?
- How will the report be used?
- Will the report be shared and if so, with who?
- How often is the report required? Is it a once off report?

6. Multi system reports (Longitudinal & composite reports)

Planning and Analytical Services will be the provider of advanced analytics that require multiple data sources to be modelled and presented. Trend reports that include time periods before Workday implementation will also be provisioned through PAS using PowerBI to build and FLIP to expose the report. Sensitive and secure data will not be exposed.

In the instance where data for a required report is to be pulled from more than one system, including pre-Workday and post-Workday, please contact People and Culture Systems through Service One to request the report, including all requirements you need as per section 5 "Report designing".
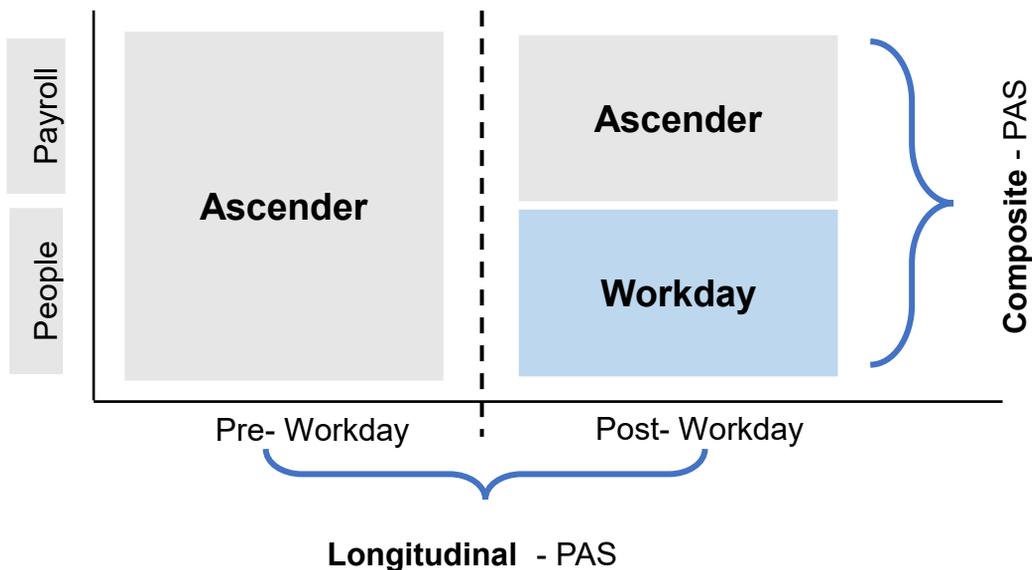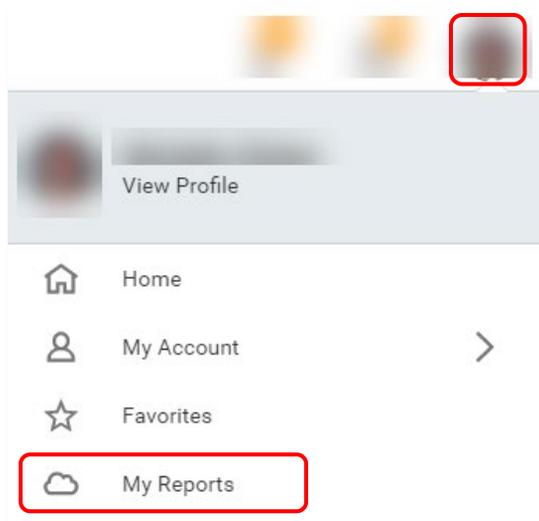

7. Historical reports

Only data from the 9th of June 2020 is able to be reported on in Workday. If you require historical reports from Ascender, please submit a Service One request to People and Culture reports. Include your historical date range required for the report.

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8. Accessing one off reports

One off reports may be assigned to you via your profile and *My Reports*

Any one off reports will show in the *My Reports* list.

9.   Commonly used reports

The below list show commonly used reports by supervisors across Flinders University. Note: time off balances report can be used by all individuals for their own time off balances from a particular date.

Report Name	Description
Costing allocations	View cost centre and position funding (tied/untied) for all workers, including the start and end dates and distribution percentages.
Current appointments	This report displays the workers and affiliates appointed to the College as well as College Services staff. Note: This is not available to all supervisors. Also not available for Portfolios.
Current worker details	View compensation details for all workers with active status in one or more selected organisations that you manage or support. Enables you to verify compensation for your active workers. Details include information about the worker's job, compensation plans, and compensation ranges. You can optionally include information about managers or narrow report results to a specified date, custom organisation, or organisation role.
Time off balances (for all staff individually)	View time off balances as of a particular date. This can be a future or past date.
Time off approved bookings	View approved time off requests for one or more organisations within a specified period of time to find out what time off you have not yet paid. Leave one or both dates blank to perform an open-ended search.

9. Current reports available

The below is a list of current (as at 25th June 2020) Flinders created reports available. Please note: the availability of these reports to you will depend upon your security rights in Workday. Reports are constantly being built so this list may change.

Pull - user can search for the report and self-generate at their own convenience.
Push - report is scheduled to be run and the output delivered at set frequency to "My Reports".

Report Name	Description	Target Audience	Pull/ Push
Active Employee Count by Location	View number of Active Employees by Location.	People & Culture Budget Owner	Pull
Directory by Location - Indexed	View a directory of workers in a Business Site. Details include the worker phone number and email, title, organisation, and business site phone number.	All staff	Pull
Check Total FTE	View workers who have a full-time equivalency greater than a specified amount. Details include the worker's last name, first name, ID, worker type, and total FTE percentage. FTE value is based on Scheduled Weekly Hours. You can also see each job held, the supervisory organisation, the job's percentage towards the total FTE, scheduled weekly hours, and time type.	People & Culture Budget Owner Supervisors	Pull

9. Current reports available

Report Name	Description	Target Audience	Pull/Push
Visa Expires in 60 days	View workers with visas and the expiry dates (within next 6 months)	Employee Supervisor People & Culture	Both. Employee and Supervisor are alerted to staff members' upcoming expiry date for their relevant work visa.
Excess Annual Leave Balances	Used to alert staff, Manager and Budget Owner that staff has annual leave balances that will exceed 40 days equivalent	Supervisor and Budget Owner	Push - Employee, Manager and Budget Owner is notified that employee has leave balance in excess of 40 days for AL and 65 days for LSL.
Excess Long Service Leave Balances	Used to alert staff, Manager and Budget Owner that staff has long service leave balances that will exceed 65 days equivalent	Supervisor and Budget Owner	Push - Employee, Manager and Budget Owner is notified that employee has leave balance in excess of 40 days for Al and 65 days for LSL.

9. Current reports available

Report Name	Description	Target Audience	Pull/Push
Fan Listing	List of current employees and their Fan for use by Finance	Finance	Push (scheduled report for delivery to user)
Workers with Probation	View Workers with probation start and end date and probation status	People & Culture, Supervisor, Budget Owner	Pull
FLIN CR – Bonafide Report for Finance	Supplementary Report to finance's Bona-Fide report out of Ascender. Includes all current employees and details	Finance	Push
FlinSafe Staff List	Displays all current employees with supervisory and location details for use by FlinSafe system.	Work, Health & Safety	Push
Staff by Teaching Program	Displays all employees and their teaching program affiliation.	All Users	Pull
Step Progression - Next Increment Date – Finance	Displays all employees with their next increment date for compensation. Used to supplement Finance's Budget report.	Finance	Push

9.   Current reports available

Report Name	Description	Target Audience	Pull/Push
Current Leave Balances by Org & Type	Displays all workers for the supervisory organisation and subordinates, their leave balance (Time Off Plan) as per selection. This report is useful to manage excess leave balances in Annual Leave and Long Service Leave.	Budget Owners, Supervisors, People and Culture	Pull
Time Off Approved Bookings	Displays all workers for the supervisory organisation and for the selected time period, all leave (time off) bookings.	Budget Owners, Supervisors, People and Culture	Pull
Integration reports for Planning & Analytical Services: All Workers All Positions Ethnicity Qualifications Academic Appointments Worker on leave Terminations Step Progression	These reports are provided to Planning & Analytical Services through Outbound integration systems in Workday to assist the generation for Composite and Longitudinal reports and dashboards on Flinders Intelligence Portal (Flip).	Planning & Analytical Services	Push (Integration system)

11.   Glossary

The following table shows the *Terminology* in Workday and the *Explanation* of the term in alphabetical order.

Terminology	Explanation
Absence	Global terminology used in Workday for 'Leave'
Affiliation	Affiliation is a Flinders term, and not the same as the Workday concept of an Academic Affiliate. An affiliation describes the working relationship of a worker with a business unit or operating model unit, regardless of the business unit that holds the budget for that worker. In Workday, this affiliation is recorded as an Academic Appointment.
Academic appointment	Description of the role a worker, academic or professional, performs in relation to an operating model unit such as a Teaching Program or Research Section. An Academic Appointment is how Workday will show the relationship of a worker with the University operating mode unit (which differs from the relationship between a worker and supervisor in the supervisory organisation).
Academic unit	A Workday object that represents a business unit at Flinders University, including Colleges and Portfolios. Each academic unit is assigned to one superior academic unit. These assignments result in a single hierarchical structure that reflects the formal organisational structure of Flinders University (without creating academic unit organisational hierarchies). An academic unit inherits role assignments and business process definitions from the superior academic unit. Examples of an Academic Unit might be a College, Division, Portfolio, Institute or Centre. Formally known as a Clevel in Ascender Pay.
Academic unit hierarchy	A hierarchical grouping of academic units primarily used for roll-up reporting.

11. Glossary

Terminology	Explanation
Budget Owner	Budget Delegation Holder of a group of supervisory organisations at the following organisational level – Portfolio, College, Division or College Services. Members of this group include – Members of the Senior Executive Team, Divisional Directors, Deans, People & Resources, Directors, College Services, Chief Financial Officer and Chief Information Officer.
Budget owner supervisor	Manager of the Budget Owner, where applicable. Please refer to the list above for details on budget owners.
Business object	Objects used to store data in Workday (such as organisations or workers). A business object has fields and instances, which are analogous to rows and columns in a spreadsheet. Workday links related business objects: a worker is associated with a position, the position to a job profile, a job profile to a jog family and so on.
Business process	The tasks that compose a business process, the order in which they must be done, and who can do them. Determines who approves or denies the task, who needs to perform additional tasks and who needs to be notified of any additional system events that require action.
Compensation partner	Designated members of the Payroll team to process transactions in Ascender Pay.
Compensation finance partner	Finance Business Partner (College or Portfolio) and any other associated finance roles to a College or Portfolio (such as Grants Finance Officer).
Continuous service date	First day of work for an unbroken period of service at Flinders University. However please note that this date is not used for calculating long service leave or other entitlements, which are all performed via Ascender Pay.

11. Glossary

Terminology	Explanation
Costing allocation	Global terminology used in Workday for 'General ledger code or Account code'.
Custom report	Reports not delivered as standard by Workday but are built by P&C Systems. Request for custom reports to be made through Service One.
Dashboard (landing pages)	A specialised landing page containing a set of pre-configured applications for a functional area that you can copy or modify, such as your Flinders Workday Home landing page.
Data source	A data source defines a set of business object instances for reporting purposes. Allows reporting access to all business objects related to those in the data source.
Effective as of date	Date you require the report to start from.
Functional area	A collection of domain or business process security policies that are related to the same set of product features, for example, Benefits or Compensation.
HCM	Human Capital Management system
Hierarchy	Hierarchy is the group of people arranged by classification like an organisation structure.
Hire date	The first date that the employee first commences an unbroken period of service at Flinders (Please note that for staff commencing prior to 1 June 2020: As historical data is not recorded in Workday the Hire Date displayed on the worker's profile may not be as expected. Please be aware that this will not have any impact on service eligibility.)

11. Glossary

Terminology	Explanation
HR Administrator	P&C Systems and P&C team members, who have administrator access to Workday and are able to undertake system and configuration maintenance.
HR Partner (supervisory)	Role assigned to the P&C Group who can initiate and action business processes for their colleges / portfolios. This group is specifically the P&C Client Services including P&C Business Partner and Coordinators.
HR Partner (local)	Role assigned to the P&C Group who can initiate and action business processes for anyone in Flinders University. This group is currently P&C Employment Services, and some payroll services team members.
Job	The engagement or employment of a person into a position.
Job category	Defined category to allow tracking of additional job information, that is displayed on a position and facilitates reporting at the position level.
Job-based security group	A security group that includes one or more job-related attributes or objects including job profile, job family, job category, management level, or exempt/non-exempt status.
Job family	Grouping of related job profiles, defined for Flinders University.
Job family group	High level grouping of related job families, defined for Flinders University, such as "Academic" or "Professional"
Job level	This is a Workday concept that is intended to categorise job profiles (and their associated jobs and positions) based on commensurable factors such as the level of education, experience or training required to perform a job. Job profiles are assigned job levels, and those job levels are organised into a hierarchy.

11. Glossary

Terminology	Explanation
Job profile	Description of a set of identical positions and can be assigned to one or multiple positions. Attributes of a job profile include position title, management level and classification. Job profiles are grouped by the job function. Job profiles relate to only one position title and compensation grade, and are assigned a place in the management level hierarchy. For example: a People and Culture Business Partner, HEO8 is a single job profile, that will be applied to the group of people who are appointed to that position type.
Length of service	Number or years continuous service. Calculated in Workday from Continuous Service Date. Note this is not related to your Long Service Leave or other entitlements – which are calculated from Time Off Service Date and subject to eligibility under the Enterprise Agreement.
Management level	Hierarchy attached to position profile.
My Organisations	Grouping of workers who report to you as a supervisor.
Original hire date	First day of work for all periods of service at Flinders University, including breaks of service.
Organisation security group	A security group whose members are any workers assigned to that organisation.
Organisations (Supervisory organisation)	Grouping of workers who report to the same supervisor, arranged in a University-wide hierarchy that provides structure to route actions through business processes and define access to worker data and reports. For each Supervisor that exists at Flinders, there is a corresponding supervisory organisation reflected in Workday.

11. Glossary

Terminology	Explanation
Organisation Role	Workday defined role for security groups.
Position	A position might be thought of as a 'chair' which exists in the organisation structure. It may be vacant or filled, but exists regardless of whether or not the position is filled (occupied).
Position category	Position Category is a HEIMS (Australian Government Reporting) concept. The meaning and use of position category and its associated codes is fixed. In Workday, these position categories will be attached to job profiles in the job category object.
Prehire	A candidate who has a record in Workday but not yet hired into a position.
Primary job	Defined job determined manually during the hire process according to business rules that impact on system integrations. The logic for what defines a "Primary Job" is documented for Flinders University and follows currently applied methodology. Determination of the primary job is undertaken by P&C Employment Services using the agreed logic.
Role	A grouping of people with specific responsibilities and permissions. In a business process, the role for each step includes all of the workers in that role in the business process target organisation.
Security Group	A collection of users of objects that are related to users. Security group access to securable item in a security policy grants access to the users associated with the security group

10. Glossary	
Terminology	**Explanation**
Sort Ascending	Sorts the data found by earliest to latest in column selected.
Sort Descending	Sorts the data found by latest to earliest in column selected.
Standard report	Reports that Workday created and delivers to all Workday customers.
Subordinate organisation	Grouping of workers who report to the same supervisor, underneath the supervisory organisation
Systems administrator	P&C Systems team members with specific system access and administrator rights, which includes reporting creation in Workday.
Target	The object that a business process operates on. For example, for business processes that deal with an employee record, the target is the employee.
Time in Job profile	Number of years in a job profile. Calculated in Workday.
Time in position	Number of years in a position. Calculated in Workday.
Time off service date	Date used to determine when an employee is eligible to take long service leave. Adjusted for prior service and leave without pay according to Flinders business rules.
Time type	A characteristic of a job profile that categorises the amount of time required for a job or position, such as full-time or part-time.
To do	Reminder to do something inside or outside of Workday. They can be part of business processes, and must be marked complete before the workflow will advance to the next step.

10. Glossary

Terminology	Explanation
User-based security group	A security group whose members are workers. In a security policy, it grants access to the securable items to all members of the group.
Worker	A person whose relationship with Flinders University is recorded in Workday. The terms of this relationship are defined according to an agreement such as a contract or letter of appointment. • **employee type**: a worker who holds at least one position paid through payroll. • **contingent worker type**: a worker who holds one position paid through Finance and does not hold any positions paid through payroll • **affiliate type**: a person who does not hold any position at the University (either as an employee or contingent worker) but has an unpaid relationship with the University that needs to be recorded in Workday (academic affiliates only exist in the context of academic appointments, are not paid and do not have positions or assignments in the supervisory organisation). • **not in Workday**: a worker who does not hold a position and whose relationship with Flinders University does not need to be recorded in Workday
Work function	Work function is an HEIMS (Australian Government Reporting) concept. The meaning and use of work function and its associated codes is fixed. In Workday, these function codes will be attached to job profiles in the job classification object.