



## Salary Effort Trend Report

The Salary Effort Trend report in Workday will allow users to view dollars and effort % by pay period. The following security roles have access to the Salary Effort Trend Report for a **Supervisory Organization**: Manager, HCM Business Manager, HCM Business Assistant with Compensation. The following roles have access to the Salary Effort Trend Report based on Cost Center: Cost Center Manager, Cost Center Financial Analyst with Payroll Details. The following roles have access based on Grant: Grant Manager, Grant Financial Analyst.

### Run by Supervisory Organization

If you have the security role of Manager, HCM Business Manager, or HCM Business Assistant with Compensation, you can run this report by Supervisory Organization or for a specific worker within your Supervisory Organization.

1. Search and select **Salary Effort Trend** report from Workday search bar.
2. The **Period** should always be the current open period, and will default.
3. The **Time Period** will default to **Last 12** Periods and can be changed as follows:
  - **Current Period**: Returns the GL period prompted in 2 above
  - **Current Period YTD**: Returns the period in 2 above and all prior periods for the fiscal year
  - **Last 12 Periods**: Returns the period in 2 above and the preceding 11 months
4. To run this report for a Supervisory Organization, click in the **Supervisory Organization** selection box and select an organization.
5. To run this report by an individual worker(s), enter the worker or click and search to select. Leave blank to run all workers within the selected Supervisory Organization.
6. To save your selection, enter a **Filter Name** and click **Save**. To run the saved selection in the future, click Manager Filters.
7. Click **OK** to run the report.
8. Results display for all employees within your Supervisory Org, as selected.

Job Profile	Worker	Cost Center	Grant	Gift	Fund	Program	Project	SOC Type	09/01/2023 - 09/30/2023 (US Monthly)		08/01/2023 - 08/31/2023 (US Monthly)		07/01/2023 - 07/31/2023 (US Monthly)		06/01/2023 - 06/30/2023 (US Monthly)		05/01/2023 - 05/31/2023 (US Monthly)	
									Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %
									4554 - Administrative Asst Clinical	Pam Beesly (0111111)	CC123456 Sample Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	560.00
4554 - Administrative Asst Clinical	Pam Beesly (0111111)	CC567890 Sample Center Too	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	440.00	44.00%	440.00	44.00%	440.00	44.00%	440.00	44.00%	440.00	44.00%
4555 - Sr. Admin Asst Clinical	Jim Halpert (0333333)	CC123456 Sample Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	1,000.00	100.00%	1,000.00	100.00%	1,000.00	100.00%	1,000.00	100.00%	1,000.00	100.00%



## Salary Effort Trend Report

**Salary Effort Trend** ... 01/01/2023

Period: FY24 - Oct      Supervisory Organization: Sample Supervisory Organization (Michael Scott (0123456)) (S987654AA)

Time Period: Last 12 Periods

16 items 1 7

Job Profile	Worker	Cost Center	Grant	Gift	Fund	Program	Project	SOC Type	09/01/2023 - 09/30/2023 (US Monthly)		08/01/2023 - 08/31/2023 (US Monthly)		07/01/2023 - 07/31/2023 (US Monthly)		06/01/2023 - 06/30/2023 (US Monthly)		05/01/2023 - 05/31/2023 (US Monthly)	
									Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %
4554 - Administrative Asst Clinical	Pam Beesly (0111111)	CC123456 Sample Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	560.00	56.00%	560.00	56.00%	560.00	56.00%	560.00	56.00%	560.00	56.00%
4554 - Administrative Asst Clinical	Pam Beesly (0111111)	CC567890 Sample Center Too	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	440.00	44.00%	440.00	44.00%	440.00	44.00%	440.00	44.00%	440.00	44.00%
4555 - Sr. Admin Asst Clinical	Jim Halpert (0333333)	CC123456 Sample Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	1,000.00	100.00%	1,000.00	100.00%	1,000.00	100.00%	1,000.00	100.00%	1,000.00	100.00%

### Run by Supervisory Organization

1. Click any header within the resulting report to filter or sort the results.
2. All workers within the Supervisory Organization selected will display with their entire effort. If a worker's effort is split between multiple Cost Centers, etc. there will be a line for each distribution.
3. The Cost Center for each workers' distribution(s) will display. Note that the center will display blue if you also have a security role to view the details by that organizational level.
4. The Grant, Gift, Fund, Program, and/or Project details of the workers' distribution(s) will display.
5. Any worker with Salary Over the Cap (SOC) will display the SOC Type.
6. The workers Amount and Effort % by pay period will display.
7. Use the options at the top to export the report to Excel, Worksheets, or to filter columns.



## Salary Effort Trend Report

### Run by Organization Level (FDM)

If you have the security role of Cost Center Manager, Cost Center Financial Analyst with Payroll Details, Grant Manager, Grant Financial Analyst, you can run this report by Organizational Level (Cost Center, Grant, etc.) or for a specific worker charging time to an organization you have access to.

1. Search and select **Salary Effort Trend** report from Workday search bar.
2. The **Period** should always be the current open period, and will default.
3. The **Time Period** will default to **Last 12 Periods** and can be changed as follows:
  - **Current Period:** Returns the GL period prompted in 2 above
  - **Current Period YTD:** Returns the period in 2 above and all prior periods for the fiscal year
  - **Last 12 Periods:** Returns the period in 2 above and the preceding 11 months
4. To run this report for a Cost Center, Cost Center Hierarchy, or Grant, click in the applicable selection box and select.
5. To run this report by an individual worker(s), enter the worker or click and search to select. Leave blank to run all workers within the selected Organization.
6. To further limit your selection by Program, enter or select a Program.
7. To save your selection, enter a **Filter Name** and click **Save**. To run the saved selection in the future, click Manager Filters.
8. Click **OK** to run the report.
9. Results display for all employees within your Supervisory Org, as selected.

The screenshot shows the 'Salary Effort Trend' configuration window. At the top, a search bar contains 'salary eff' (1). Below it, the 'Salary Effort Trend Report' is selected (1). The 'Period' dropdown is set to 'FY24 - Oct' (2). The 'Time Period' dropdown is set to 'Last 12 Periods' (3). The 'Cost Center/Cost Center Hierarchy' dropdown is open, showing a selection box (4). The 'Grant' dropdown is also open (4). The 'Worker' dropdown is open, showing a search box (5). The 'Program' dropdown is open, showing a selection box (6). At the bottom, there is a 'Filter Name' input field, a 'Save' button (7), and 'OK' and 'Cancel' buttons (8).

**Salary Effort Trend** 9/16/2023 9:16 AM

Period: FY24 - Oct Cost Center/Cost Center Hierarchy: Cost Center: CC123456 Sample Cost Center

Time Period: Last 12 Periods (9)

228 items

Job Profile	Worker	Cost Center	Grant	Gift	Fund	Program	Project	SOC Type	09/10/2023 - 09/23/2023 (US Bi-Weekly)		09/01/2023 - 09/30/2023 (US Monthly)		08/27/2023 - 09/09/2023 (US Bi-Weekly)		08/13/2023 - 08/26/2023 (US Bi-Weekly)		08/01/2023
									Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Ar
5826 - IT Project Manager	Pam Beesly (0111111)	CC123456 Sample Cost Center	GR001234 Sample Grant	(Blank)	FD001 General Fund	(Blank)	(Blank)	NIH Level II Salary Cap	0	0.00%	343.91	1.91%	0	0.00%	0	0.00%	
3542 - Assoc Program Manager	Jim Halpert (0333333)	CC123456 Sample Cost Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	1,087.97	50.00%	0	0.00%	1,089.61	50.00%	0.00	0.00%	
3002 - Research Svcs Consultant III	Angela Martin (0456123)	CC123456 Sample Cost Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	0	0.00%	0	0.00%	0	0.00%	0	0.00%	
3544 - Sr Program Manager	Stanley Hudson (987654)	CC123456 Sample Cost Center	(Blank)	(Blank)	FD001 General Fund	PG001234 Sample Program	(Blank)	(Blank)	0	0.00%	3,243.59	60.00%	0	0.00%	0	0.00%	3.2



## Salary Effort Trend Report

**Salary Effort Trend** ... 01/19/23

Period: FY24 - Oct      Cost Center/Cost Center Hierarchy: Cost Center: CC123456 Sample Cost Center

Time Period: Last 12 Periods 1

228 items 2 3

Job Profile	Worker	Cost Center	Grant	Gift	Fund	Program	Project	SOC Type	09/10/2023 - 09/23/2023 (US Bi-Weekly)		09/01/2023 - 09/30/2023 (US Monthly)		08/27/2023 - 09/09/2023 (US Bi-Weekly)		08/13/2023 - 08/26/2023 (US Bi-Weekly)		08/01/2023
									Amount	Effort %	Amount	Effort %	Amount	Effort %	Amount	Effort %	Ar
5826 - IT Project Manager	Pam Beesly (01111111)	CC123456 Sample Cost Center <span>5</span>	GR001234 Sample Grant	(Blank)	FD001 General Fund	(Blank)	(Blank)	NIH Level II Salary Cap <span>7</span>	0	0.00%	343.91	1.91%	0	0.00%	0	0.00%	
3542 - Assoc Program Manager	Jim Halpert (0333333)	CC123456 Sample Cost Center <span>5</span>	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	1,087.97	50.00%	0	0.00%	1,089.61	50.00%	0.00	0.00%	
3002 - Research Svcs Consultant III	Angela Martin (0456123)	CC123456 Sample Cost Center	(Blank)	(Blank)	FD001 General Fund	(Blank)	(Blank)	(Blank)	0	0.00%	0	0.00%	0	0.00%	0	0.00%	
3544 - Sr Program Manager	Stanley Hudson (987654)	CC123456 Sample Cost Center	(Blank)	(Blank)	FD001 General Fund	PG001234 Sample Program	(Blank)	(Blank)	0	0.00%	3,243.59	60.00%	0	0.00%	0	0.00%	3.2

### Run by Supervisory Organization

- Click any header within the resulting report to filter or sort the results.
- Pay periods displayed are split by bi-weekly and monthly periods.
- Use the options at the top to export the report to Excel, Worksheets, or to filter columns.
- Workers with effort charged to the Organization selected will display their effort within that organization. If a worker's effort is split between multiple Cost Centers, etc. they will only display the portion of their effort you have access to.
- The Cost Center for each workers' distribution(s) will display. Note that the center will display blue if you have a security role to view the details by that organizational level.
- The Grant, Gift, Fund, Program, and/or Project details of the workers' distribution(s) will display. Note that the Grant, Gift, Program, and/or Project will display blue if you have a security role to view the details by that organizational level.
- Any worker with Salary Over the Cap (SOC) will display the SOC Type.
- The workers' Amount and Effort % by pay period will display. Note the Effort is the total Effort %, but you will only see the effort on organizations you have access to based on the organization selected in the report prompt in step 4 on page 3.