Maintain Cohorts

STAFF

Workday Student

This tip sheet explains the process for access to Maintain Cohorts. It is intended for Staff.

Cohorts in Workday are collections of records used to include or exclude students from specific business processes which allow the management of those specific populations.

Create a Student Cohort

To complete this task in workday, follow these steps:

1. Access the Appropriate Domain.
2. Ensure you have access to the **Manage: Student Cohort** domain in the Academic Advising functional area.
3. Choose the Type of Cohort. Decide whether you want to create a **Manual Cohort** (members added and updated manually) or a **Criteria-Based Cohort** (members populated and updated automatically based on defined criteria).
4. Create Student Cohort.
5. For a Manual Cohort. Select the option to create a manual cohort and add members as needed.
6. For a Criteria-Based Cohort. Use a saved search or a custom report to define the membership criteria.
7. Access the **Create Custom Report** task if needed to set up the criteria.
8. Assign Roles. If applicable, assign roles to the cohort collection to enable other administrators to manage and view the cohort.
9. Finalize the Cohort. Once created, note that you cannot change the type of cohort. Ensure that all details are correct before finalizing.
10. Security Considerations. Evaluate security settings to restrict access to the cohort as necessary, ensuring only authorized personnel can view or manage the cohort.

View a Cohort

To view a cohort, you can access the following reports:

- **View Student Cohort History for Student**: Displays the history of adding and removing students or applicants from cohorts
- **View Student Cohorts**: Lists the cohorts available

- **Find Student Cohorts**: Allows you to search for specific student cohorts by clicking on the student cohort name
- **View Student Cohort Collection**: Shows the collections of cohorts

Additionally, you can view specific details about the cohort, such as:

- **Active Students in Cohort**: Lists active members of the cohort
- **Applicants in Cohort**: Displays applicants who are part of the cohort
- **Cohort Membership Assignment Overrides**: Shows manual membership overrides for criteria-based cohorts
- **Future Cohort Membership Assignments**: Lists for future members of the cohort
- **Support Roles**: Displays roles assigned to the cohort and the individuals fulfilling them

Ensure you have the appropriate security access to view these reports and details.