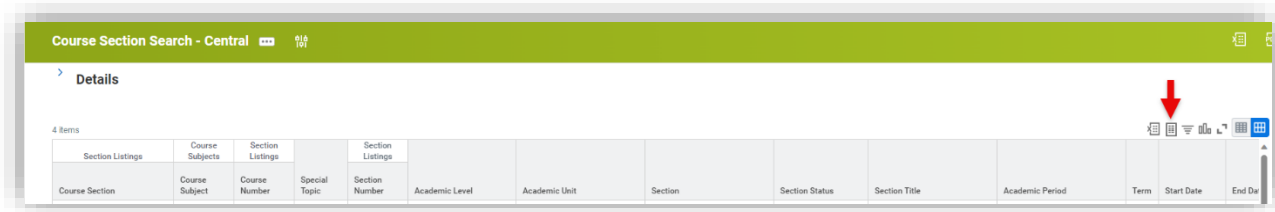




Reviewing Reports in Workday Worksheets

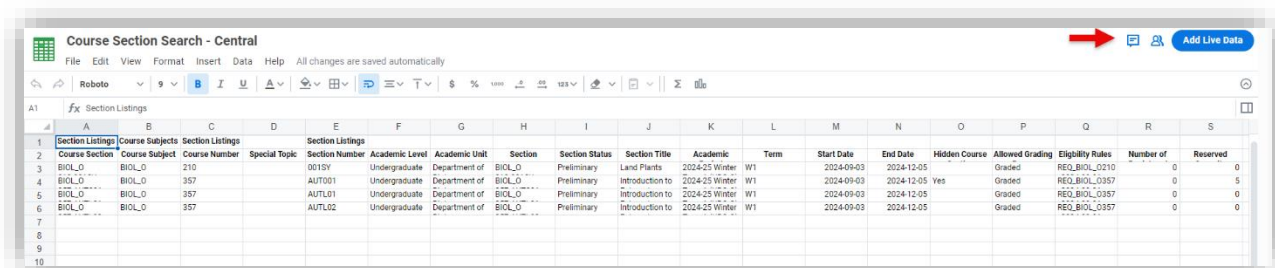
In Workday you can review selected reports in Worksheets. In Worksheets reports can be edited, saved and updated with new data in real time, shared with and assigned to other individuals.

STEP 1: At the top right corner of your report, you will see this group of action buttons. Click the Second button in “Export to Worksheets”

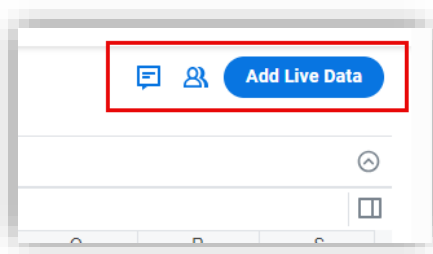


STEP 2: This will open a report that resembles an Excel spread sheet within Workday. Data in this spread sheet can be manipulated much in the same way as an excel spread sheet.

- Moving columns or Rows
- Hiding or deleting Columns/Rows
- Sorting and Filtering information.
- Changes you make in this sheet are saved Automatically.
- Changes made in this report does not update or change the live report/Course Section information in Workday.

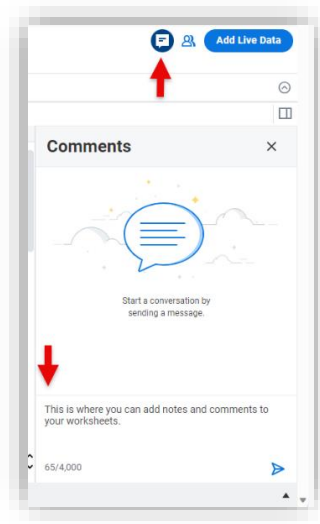


STEP 3: In the top right you will see 3 blue buttons, from left to right those buttons are: Comments, Share, Add Live Data.

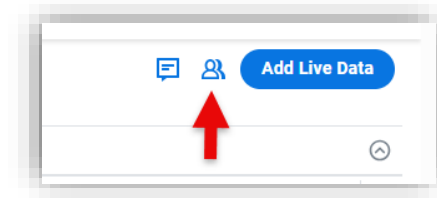




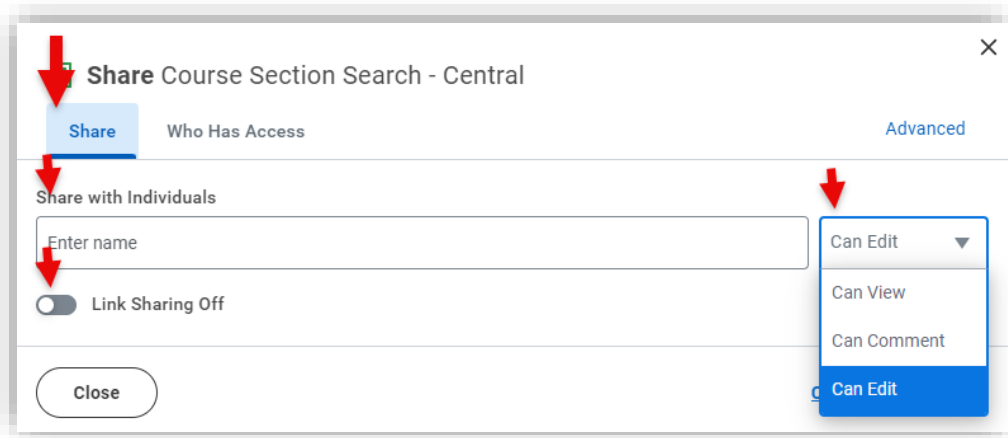
Comments: here notes and comments can be added/ viewed by those who share access to the report.



Share: Clicking the share button will open a menu box to share your Worksheet. There will be 2 tabs: Share – to add members to your report, Who Has Access - to view and manage who has access to your report.

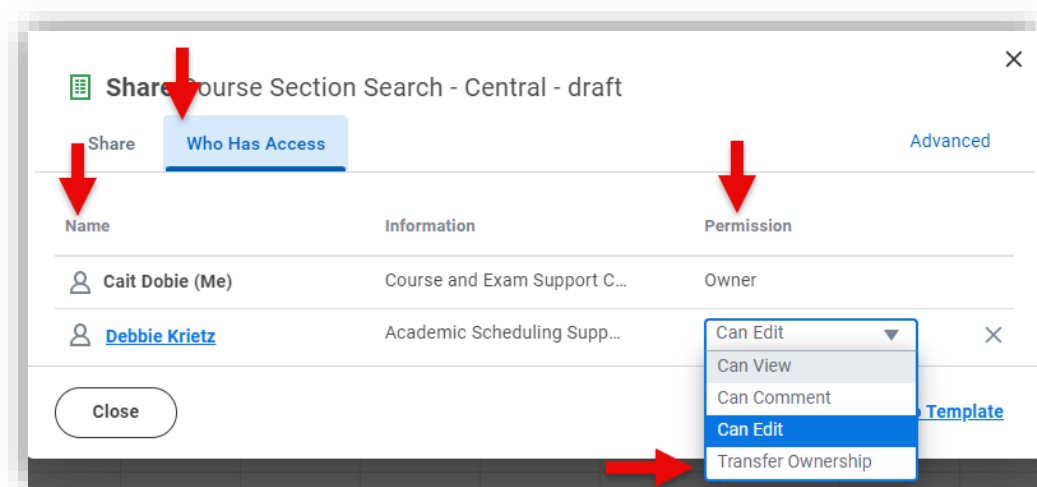


On the “Share” tab, invite members to “View”, “Comment” or “Edit” your report. You can also allow/disallow members “Link sharing” for your report.





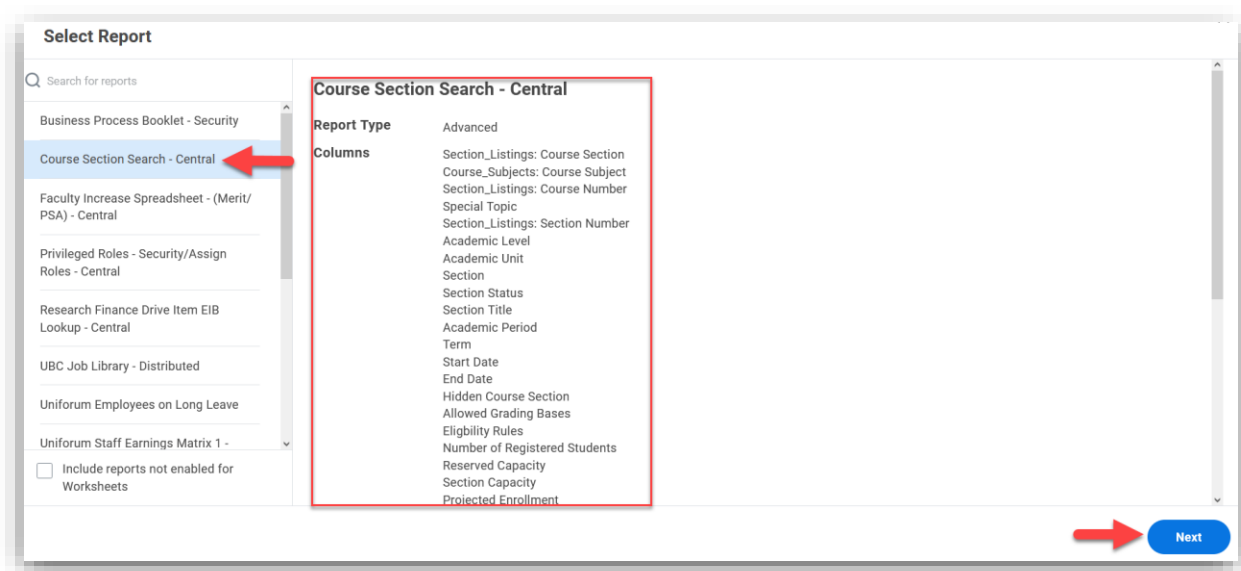
On the “Who Has Access” tab you can see who has access and what their permissions are. On this tab you can manage or remove a member’s access or transfer ownership of the report to a member.



TIP: To transfer ownership of a report, you must first share a report with a member.

Add Live Data: Here you can refresh your Worksheet with live data, to ensure you are working with the most up to date information. Select “Add Live Data” a dialog box will open.

- Search for the report you would like to pull information from. Results will populate in the pane to right.
- Select “Next”





c. Enter the search criteria and select “Next”

a. Choose columns or “Select All”


b. Select “Next”



- c. Select “Live Data Area”
- d. Type in a tabel name
- e. Select “Highlight live data area”
- f. Select “Add”


Select Options Course Section Search - Central

Insert report data as:

Live Data Area  Maintains a connection to Workday data. You can refresh the contents of a live data area on demand.

Static Values Does not maintain a connection to Workday data. A snapshot of the report data will be inserted as static values.

Table Name

BIOL_Table 


If you dont provide a table name, Worksheets assigns one. For details, see the User Guide.

Limit number of rows inserted

Highlight live data area

Restrict live data editing and refresh to the owner only (for all live data in the workbook)


Enable Multi-Instance Values

Previous  **Add**

- g. Select “Refresh Now” and select “Confirm”

Course Section Search - Central

File Edit View Format Insert Data Help All changes are saved automatically

Roboto 9 9 B I U A V  COUNTA 40

AZ	Live Data	A	B	C	D	E	F	G	H	I	J	K
9		BIOL_0 125-L04	BIOL_0	125		L04	Undergraduate	Department of	BIOL_0 125-L04	Open	Biology for	2023-24
10		BIOL_0 125-L05	BIOL_0	125		L05	Undergraduate	Department of	BIOL_0 125-L05	Open	Biology for	2023-24
11		BIOL_0 125-L06	BIOL_0	125		L06	Undergraduate	Department of	BIOL_0 125-L06	Open	Biology for	2023-24
12		BIOL_0 125-L07	BIOL_0	125		L07	Undergraduate	Department of	BIOL_0 125-L07	Open	Biology for	2023-24
13		BIOL_0 125-L08	BIOL_0	125		L08	Undergraduate	Department of	BIOL_0 125-L08	Open	Biology for	2023-24
14		BIOL_0 125-L09	BIOL_0	125		L09	Undergraduate	Department of	BIOL_0 125-L09	Open	Biology for	2023-24
15		BIOL_0 125-L10	BIOL_0	125		L10	Undergraduate	Department of	BIOL_0 125-L10	Open	Biology for	2023-24
16		BIOL_0 125-L11	BIOL_0	125		L11	Undergraduate	Department of	BIOL_0 125-L11	Open	Biology for	2023-24
17		BIOL_0 125-L12	BIOL_0	125		L12	Undergraduate	Department of	BIOL_0 125-L12	Open	Biology for	2023-24
18		BIOL_0 125-L13	BIOL_0	125		L13	Undergraduate	Department of	BIOL_0 125-L13	Open	Biology for	2023-24
19		BIOL_0 125-L14	BIOL_0	125		L14	Undergraduate	Department of	BIOL_0 125-L14	Open	Biology for	2023-24
20		BIOL_0 125-L15	BIOL_0	125		L15	Undergraduate	Department of	BIOL_0 125-L15	Open	Biology for	2023-24
21		BIOL_0 125-L16	BIOL_0	125		L16	Undergraduate	Department of	BIOL_0 125-L16	Open	Biology for	2023-24
22		BIOL_0 125-L17	BIOL_0	125		L17	Undergraduate	Department of	BIOL_0 125-L17	Open	Biology for	2023-24
23		BIOL_0 125-L18	BIOL_0	125		L18	Undergraduate	Department of	BIOL_0 125-L18	Open	Biology for	2023-24
24		BIOL_0 125-L19	BIOL_0	125		L19	Undergraduate	Department of	BIOL_0 125-L19	Open	Biology for	2023-24
25		BIOL_0 125-L20	BIOL_0	125		L20	Undergraduate	Department of	BIOL_0 125-L20	Open	Biology for	2023-24
26		BIOL_0 125-L21	BIOL_0	125		L21	Undergraduate	Department of	BIOL_0 125-L21	Open	Biology for	2023-24
27		BIOL_0 125-L22	BIOL_0	125		L22	Undergraduate	Department of	BIOL_0 125-L22	Open	Biology for	2023-24
28		BIOL_0 125-L23	BIOL_0	125		L23	Undergraduate	Department of	BIOL_0 125-L23	Open	Biology for	2023-24
29		BIOL_0 125-L24	BIOL_0	125		L24	Undergraduate	Department of	BIOL_0 125-L24	Open	Biology for	2023-24

Live Data BIOL_Table

Status Course Section Search - Central

Report Course Section Search - Central

Report Type Advanced

Inserted By

Last Refresh 2024-03-21, 10:42 a.m. PDT
By me (3f0ff770cedc4a1ea2eb4830d67797b3)
Took 1 second

Workbook Schedule No Refresh Scheduled
[Create Schedule](#)

Previous time to refresh: 1 second

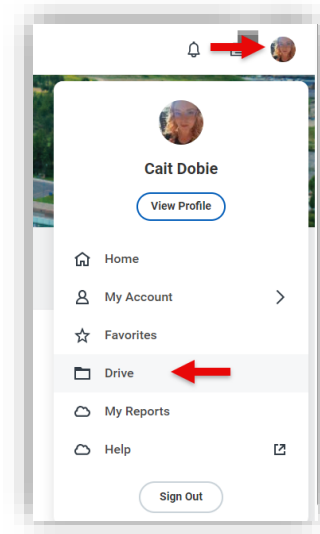
Refresh Now **Edit Live Data**



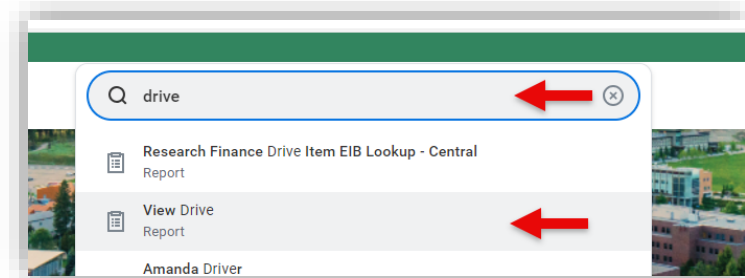
Finding Saved Reports

There are 3 ways to find your previously viewed and saved reports:

Option 1: In the top left of any screen in Workday select “Profile” > “Drive”



Option 2: In the “Main Search” bar type “Drive” and select from the drop down.



Option 3: From an open Worksheet hover over the green grid in the top left and click “Go to drive”

