

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"

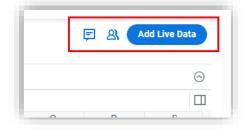
Details									
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items							XIII	≣ <u>∓</u> 00₀	." [
	Course Subjects	Section	Section						

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 <u>does not</u> update or change the live report/Course Section information in Workday.

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Course Se	Section Course Subject	Course Number	Special Topic	Section Number	Academic Level	Academic Unit	Section	Section Status	Section Title	Academic	Term	Start Date	End Date	Hidden Course	Allowed Grading	Eligbility Rules	Number of	Reserved
BIOL_O	BIOL_O	210		001SY	Undergraduate	Department of	BIOL_O	Preliminary	Land Plants	2024-25 Winter	W1	2024-09-03	2024-12-05		Graded	REQ_BIOL_0210	0	0
BIOL_O	BIOL_O	357		AUT001	Undergraduate	Department of	BICL_O	Preliminary	Introduction to		W1	2024-09-03	2024-12-05	Yes	Graded	REQ_BIOL_0357	0	5
BIOL_O	BIOL_O	357		AUTL01	Undergraduate	Department of	BIOL_O	Preliminary	Introduction to	2024-25 Winter	W1	2024-09-03	2024-12-05		Graded	REQ_BIOL_0357	0	0
BIOL_O	BIOL_O	357		AUTL02	Undergraduate	Department of	BIOL_O	Preliminary	Introduction to	2024-25 Winter	W1	2024-09-03	2024-12-05		Graded	REQ_BIOL_0357	0	0

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

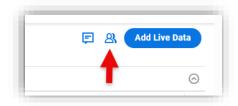




Comments: here notes and comments can be added/ viewed by those who share access to the report.

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Comments	×
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	in the
Start a conversation sending a message	
	e.

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.

Share Course Section Search - Central	:
Share Who Has Access	Advanced
hare with Individuals	+
Enter name	Can Edit 🔹
Link Sharing Off	Can View
-	Can Comment
Close	<u>c</u> Can Edit



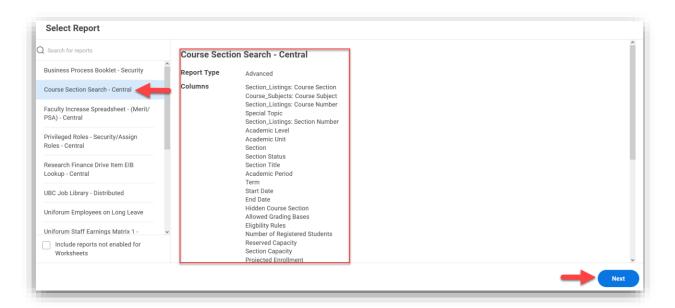
On the "Who Has Access" tab you can see who has access and what their permissions are. On this tab you can manage or remove a member's access or transfer ownership of the report to a member.

Share Who Has Access	5	1	Advanced
Name	Information	Permission	
A Cait Dobie (Me)	Course and Exam Support C	Owner	
<u> Debbie Krietz</u>	Academic Scheduling Supp	Can Edit Can View	V
		Can Comment	

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.

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





c. Enter the search criteria and select "Next"

Select Prompt Values Cour	se Section Search - Central	
Prompts	Reset All to Defaults	
Academic Period *	× 2023-24 Winter Term 2 (UBC-0) 🔅	
Academic Unit		
Special Topic Course (only)	Use Report Default	
Course Subject	> Use report Detailt × Biology (Okanagan) :≡	
Course Number		
Course Section		
Section Status		
Previous		

a. Choose columns or "Select All"

Available Columns Select AI + Section_Listings: Cour	C Search by column name	urse Section Search - Central	Preview Data 🔵
A Constant Table S S S S S S S S	Section_Listings: Court. Course_Subjects: Court. Section_Listings: Court. Section_Listings: Secti Academic Level Academic Level Section	III IIII IIII IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	
+ fx Add Formula Column III Sort by Column III Sort by Column III III Sort Order III	+ Contine Title		
	+ fx Add Formula Column	n 🗄 Sort by Column 🛛 🗮 Sort Order	

b. Select "Next"

Select Columns Course S	iection Search - Central
Q Search by column name	40 Columns Added Remove All Preview Data 🕥
Available Columns Select All All columns have been added	Section_Listings: Course Section … X Course_Subjects: Course Subject … X Section_Listings: Course Number … X Special Topic … X Section_Listings: Section N Course_Subjects: Course Subjects: Course Subject … X Section_Listings: Course Number … X Special Topic … X Section_Listings: Section N Course_Subjects: Course Subject … X Section_Listings: Course Number … X Special Topic … X Section_Listings: Section N Course_Subject … X Section_Listings: Course Number … X Special Topic … X Section_Listings: Section N Course_Subject … X Section_Listings: Course Number … X Section_Listings: Course Number … X Section_Listings: Section N Course_Subject … X Section_Listings: Course Number … X Section_Listings: Section N Course_Subject … X Section_Listings: Course Number … X Section_Listings: Section N Section_Listings: Section M Section_Listings: Section N Section_Listings: Section N
+ 🖅 Add Note Column 🔡	
+ fx Add Formula Column	Sort by Column 📃 Sort Order



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

elect Options Course Section Search -	Central	
Insert report data as:		
O 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 don't provide a table name, Worksheets assigns one. Fe	r details, see the User Guide.	
Limit number of rows inserted		
 Highlight live data area 		
Restrict live data editing and refresh to the owne	only (for all live data in the workbook)	
Enable Multi-Instance Values		
evious		

g. Select "Refresh Now" and select "Confirm"

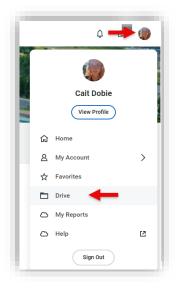
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1	BIOL_0 125-L06	BIOL_O		125			L	06	Undergraduate	Department of	BIOL_0 125-L06	Open	Biology for	r 2023-24			
2	BIOL_0 125-L07	BIOL_O		125			L	07	Undergraduate	Department of	BIOL_0 125-L07	Open	Biology for	r 2023-24	Status		~
3	BIOL_0 125-L08	BIOL_O		125			L	80	Undergraduate	Department of	BIOL_0 125-L08	Open	Biology for	r 2023-24	Report	Course Section Sea	rch -
4	BIOL_0 125-L09	BIOL_O		125			L	09	Undergraduate	Department of	BIOL_0 125-L09	Open	Biology for	r 2023-24		Central	
5	BIOL_0 125-L10	BIOL_O		125			L	10	Undergraduate	Department of	BIOL_0 125-L10	Open	Biology fo	r 2023-24	Report Type	Advanced	
6	BIOL_0 125-L11	BIOL_O		125			L	11	Undergraduate	Department of	BIOL_0 125-L11	Open	Biology for	2023-24	1 51		
7	BIOL_0 125-L12	BIOL_O		125			L	12	Undergraduate	Department of	BIOL_0 125-L12	Open	Biology for	r 2023-24	Inserted By		
8	BIOL_0 125-L13	BIOL_O		125			L	13	Undergraduate	Department of	BIOL_0 125-L13	Open	Biology for	r 2023-24	Last Refresh	2024-03-21, 10:42	a.m. PDT
9	BIOL_0 125-L14	BIOL_O		125			L	14	Undergraduate	Department of	BIOL_0 125-L14	Open	Biology for	2023-24		By me	
0	BIOL_0 125-L15	BIOL_O		125			L	15	Undergraduate	Department of	BIOL_0 125-L15	Open	Biology for	r 2023-24		(3f0ff770cedc4a1e	a2eb4830
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0	BIOL_0 125-L20			125				20	Undergraduate	Department of	BIOL_0 125-L20		Biology for				
	BIOL_0 125-L21			125				21	Undergraduate	Department of	BIOL_0 125-L21		Biology for		Previous time to refre	esh: 1 second	
	BIOL_0 125-L22			125				22	Undergraduate	Department of	BIOL_0 125-L22	17	Biology for				
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9	BIOL_0 125-L24	BIOL_O		125			L	24	Undergraduate	Department of	BIOL_0 125-L24	Open	Biology fo	r 2023-24			



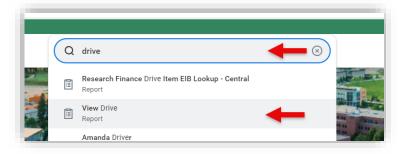
Finding Saved Reports

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"

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1	A Section Listings	B Course Subjects	Section Listings		Section Listings		Acad