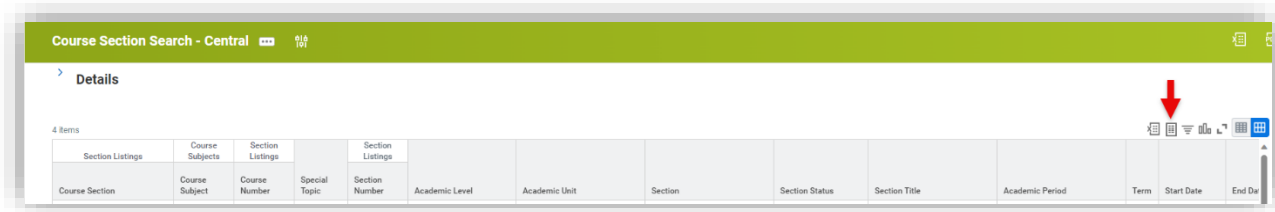# Reviewing Reports in Workday Worksheets

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.
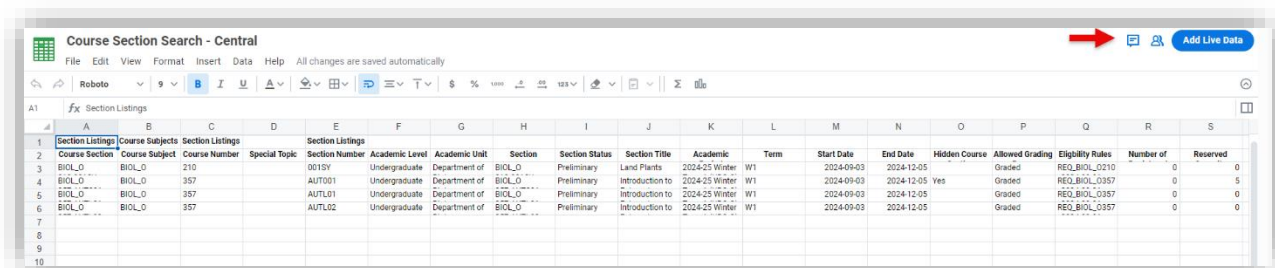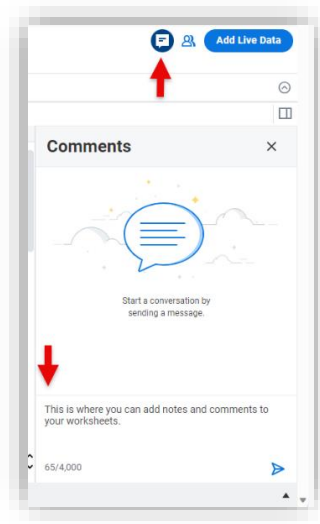

STEP 3: In the top right you will see 3 blue buttons, from left to right those buttons are: Comments, Share, Add Live Data.
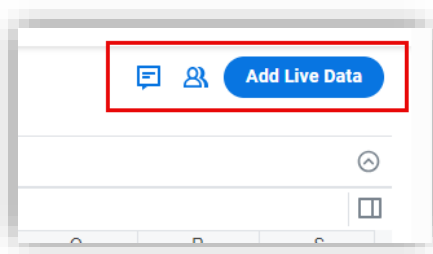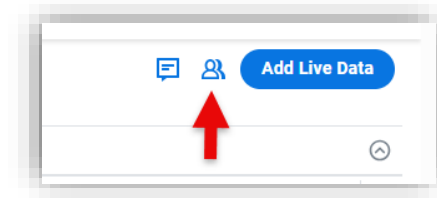
Comments: here notes and comments can be added/ viewed by those who share access to the report.

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.
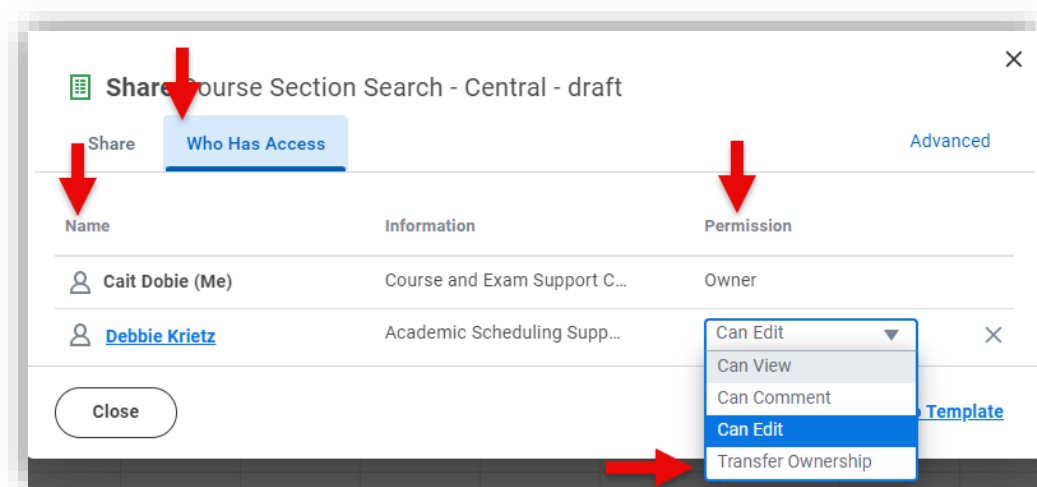

On the "Share" tab, invite members to "View", "Comment" or "Edit" your report. You can also allow/disallow members "Link sharing" for your report.
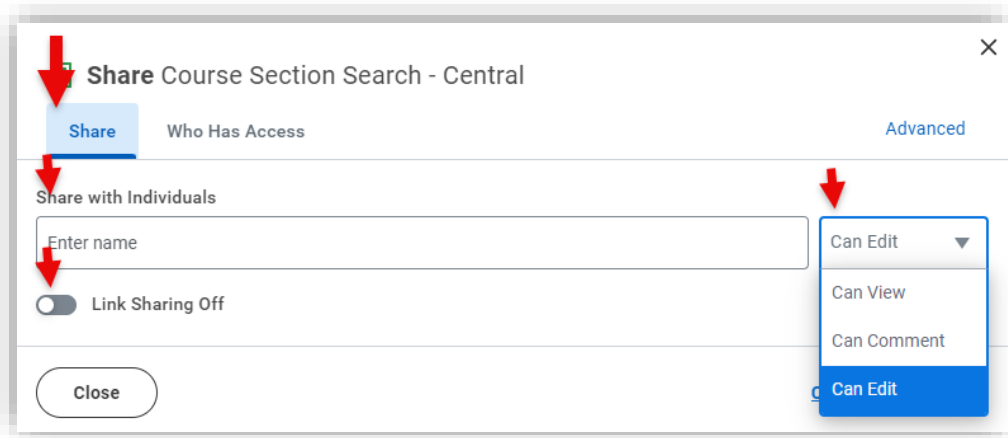
On the "Who Has Access" tab you can see who has access and what their permissions are. On this tab you can manage or remove a member's access or transfer ownership of the report to a member.

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.

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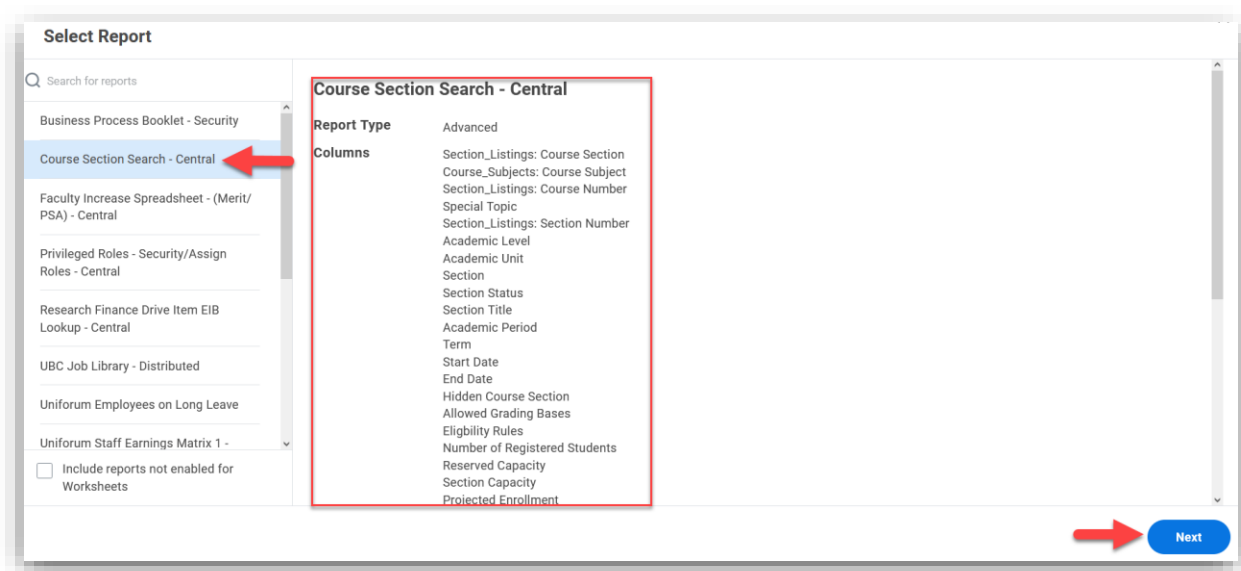
    b. Select "**Next**"

c. Enter the search criteria and select "**Next**"

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**"

g. Select "**Refresh Now**" and select "**Confirm**"
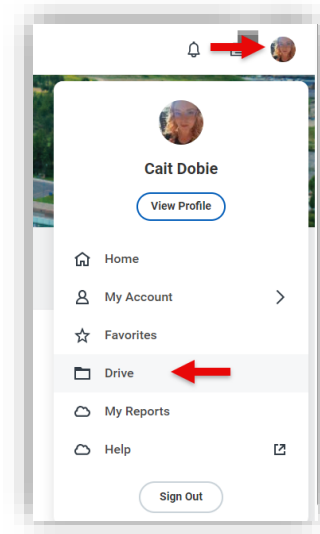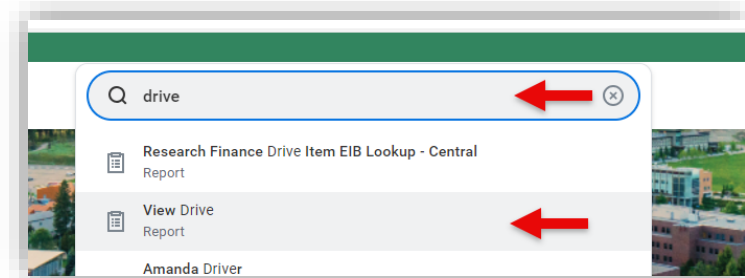
Finding Saved Reports

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"