

WORKDAY FOR MANAGERS

GETTING STARTED

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# Worksheet Basics



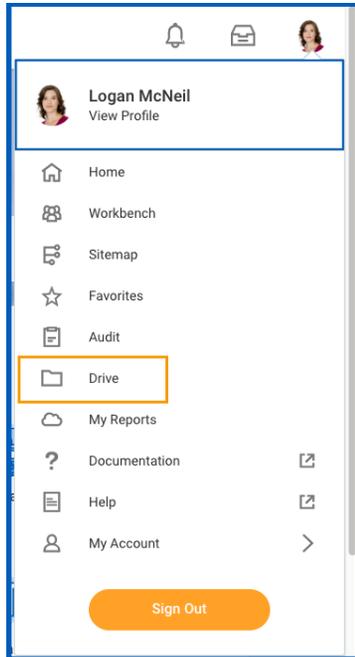
## ABOUT WORKSHEETS

Worksheets enable ad hoc data exploration, analysis, visualization, and collaboration with live transactional data within a secure Workday environment.

## ACCESS WORKSHEETS

The best way to access Worksheets is from Drive.

1. Click the worker profile icon.
2. From the menu, select **Drive**.



This is where your files, including worksheets, are stored.



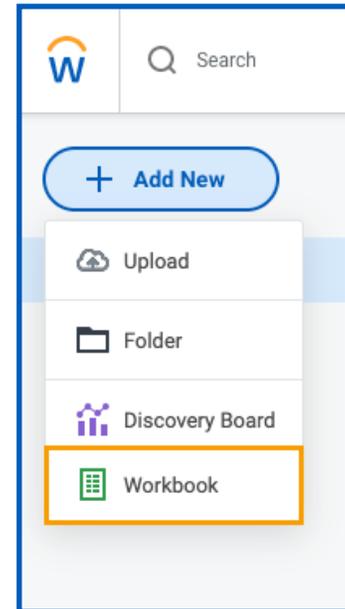
Important: Because workbooks are stored in Drive, a user needs access to both the Drive security domain and Worksheets domain.

## CREATE WORKBOOKS

There are two ways to create a workbook: as a new, blank workbook, or uploaded from an existing external file, like an Excel sheet.

### CREATE A NEW BLANK WORKBOOK

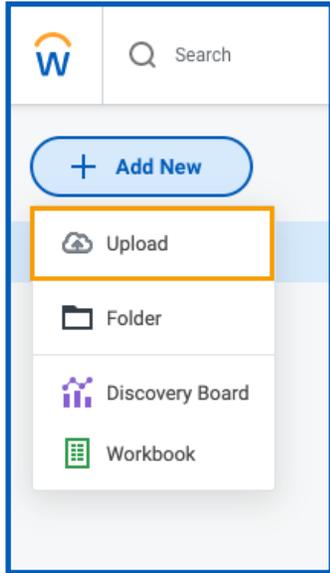
1. Within Drive, click **Add New**.
2. Select **Workbook**.



3. Rename the workbook as desired.

## UPLOAD A WORKBOOK FROM AN EXTERNAL FILE

1. Within Drive, click **Add New**.
2. Select **Upload**.



3. Select a file and click **Open**.

You will see two versions of your file: one in the original format and the other converted into a worksheet.

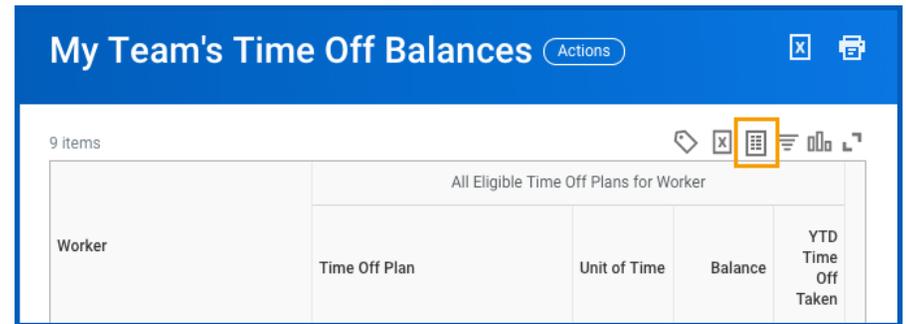


**Hint:** You also have the option to drag files from your computer directly into the All Files list to upload.

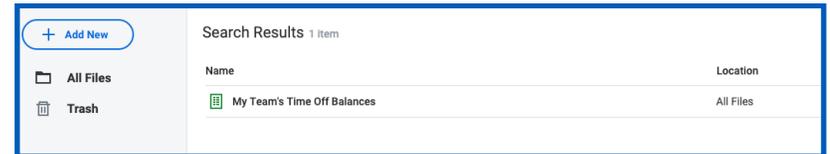
## EXPORT WORKBOOKS

Workbooks can be exported from a Report Writer report. These exports are not live data, but a snapshot of the data at the time of export.

1. From the Home page, search for and select the **My Team Time Off Balances** report.
2. To begin the export process, click the **Export to Worksheets** icon.



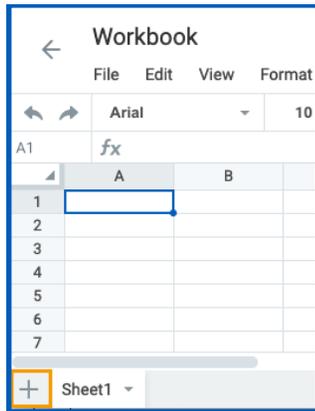
3. Navigate back to Drive to view the exported report.



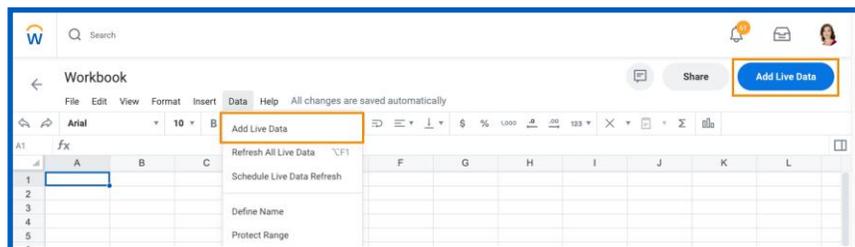
## IMPORT LIVE DATA

Live Workday data can be imported into your workbook using the guided editor.

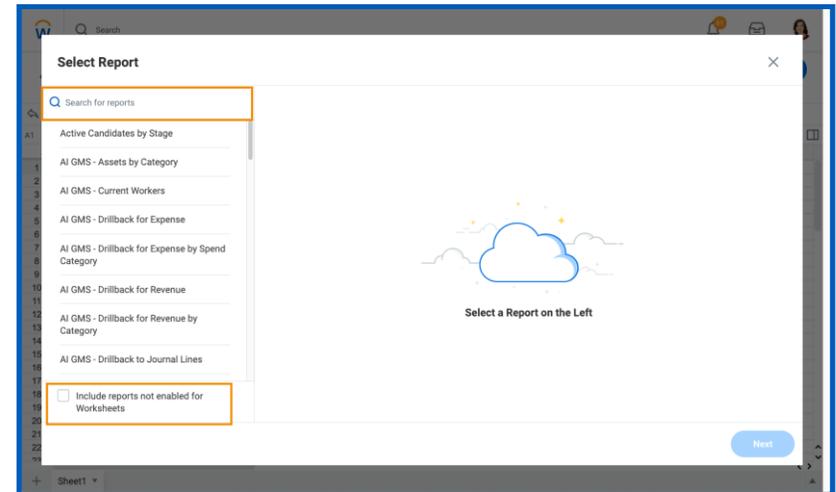
1. From the workbook, add a new sheet by clicking the plus sign in the bottom-left corner.



2. Name the sheet.
3. Select the **A1** cell in the worksheet.
4. Click the **Add Live Data** button or click **Data > Add Live Data**.

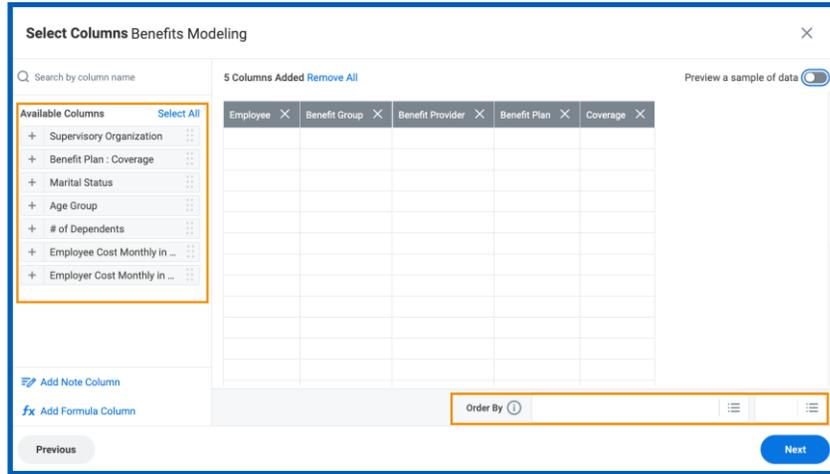


5. A guided editor opens. On the left side, locate the Report Writer report you want to open from the list of reports, or use the search field. You can also select the **Include reports not enabled for Worksheets** checkbox in the bottom-left corner to view all available report options.

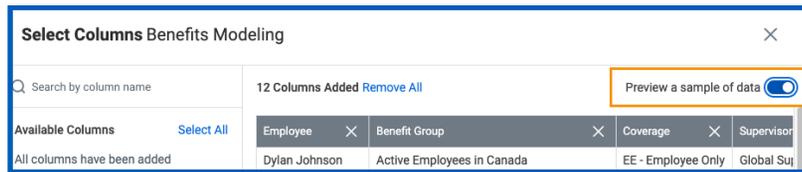


Note: Reports must be enabled to export them for Worksheets. To enable, select Enable As Web Service and Enable for Worksheets in the Advanced tab of the Report Writer report. To learn more about working with live data, see the Worksheets Learn Independent course in the Workday Learning Center.

6. Once you have selected a report, click **Next**.
7. Depending on the report selected, you may be required to enter any prompt values set up on that report.
8. Once your report has loaded, the available columns will populate on the left side.
9. Select the columns for the report by either selecting the plus icon, dragging and dropping each column, or clicking **Select All** to transfer all columns at once.



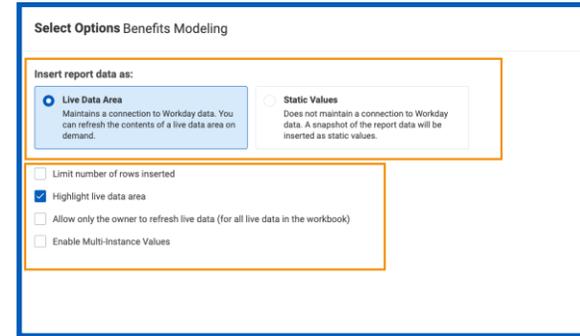
10. To populate column data as it will appear in your Worksheet, select the **Preview a sample of data** toggle.



**Note:** Report columns can be arranged in the editor by clicking and dragging from the column heading.

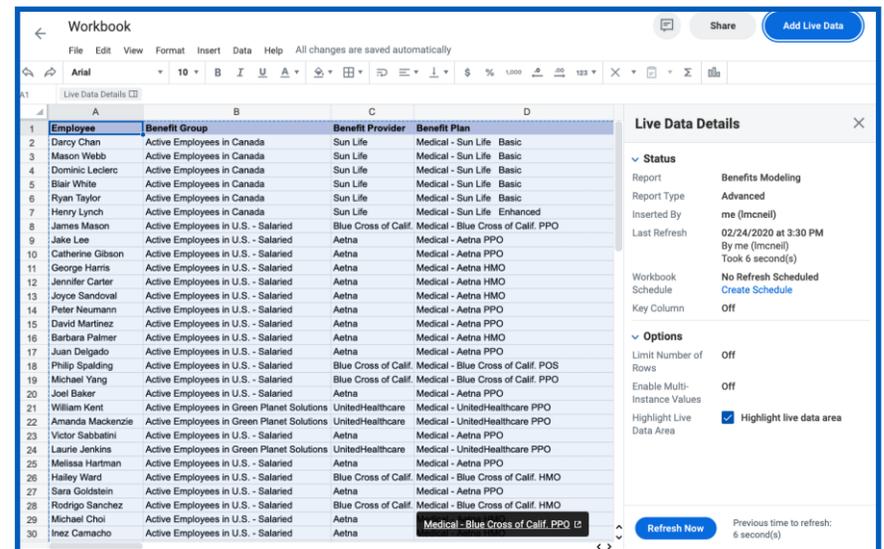
11. Click **Next**.

12. Two import options appear: Live Data or Static Values. Static Values import data is effective at import. This import will not be linked to live data in Workday.



13. Select **Live Data**.

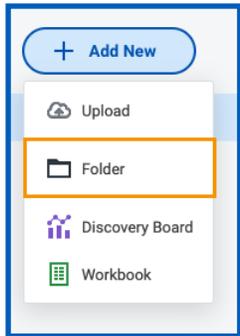
14. Click **Add**. Your workbook with live data automatically opens within Drive.



## MANAGE WORKBOOKS

### ORGANIZE WORKBOOKS WITH FOLDERS

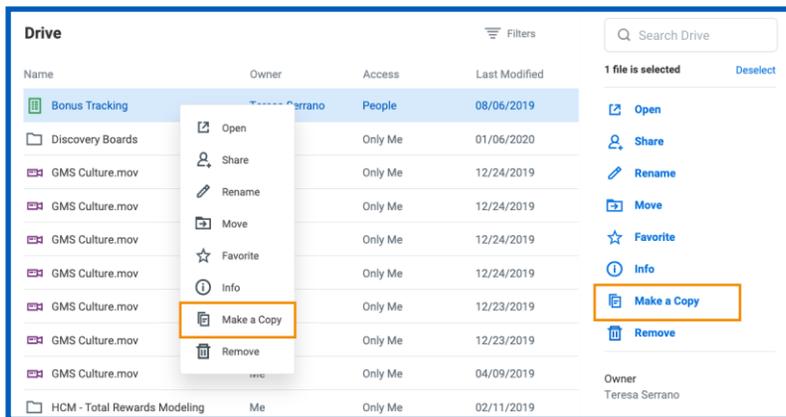
1. From Drive, click **Add New**.
2. Select **Folder**.



3. Rename the folder and then click **OK**. Your folder appears on the All Files list. You can now drag files from this page into the folder.

### COPY A WORKBOOK

1. From Drive, right-click on an existing workbook.
2. Click **Make a Copy**.



3. Update the name as necessary.
4. Click **Submit**.

### DELETE A FILE

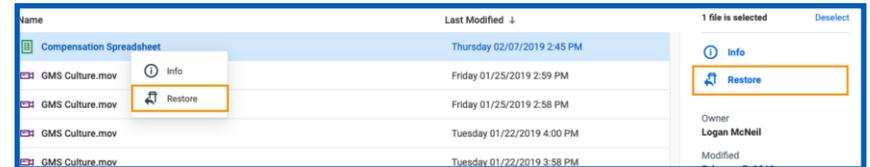
1. From Drive, right-click on a file.
2. Select **Remove**.



Note: A file moved to Trash is not permanently removed.

### RESTORE A FILE

1. From Drive, click the **Trash** folder from the left-side menu.
2. Restore the file by right-clicking on the file name and selecting **Restore**. Or, click **Restore** in the right pane.



## SHARING AND COLLABORATION

There are three permission options for sharing that an owner can grant to shared users:

Permission	Description
<b>Can View</b>	Allows view-only permissions to the workbook.
<b>Can Comment</b>	Allows users to view the workbook and post comments.
<b>Can Edit</b>	Allows users to edit, share, and post comments to the workbook.

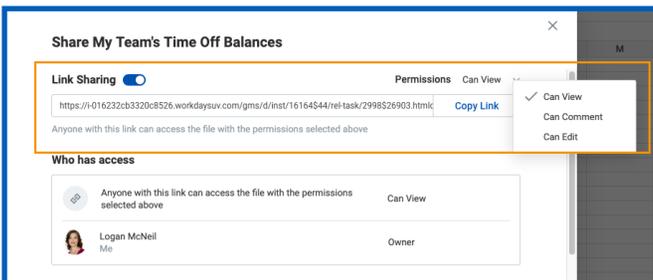
You can also set permissions at the folder level. Using permissions allows you to share multiple files with the same group and set the necessary permissions only once.



**Important:** Users need to be enabled in the Worksheets security domain to share and collaborate.

## LINK SHARING

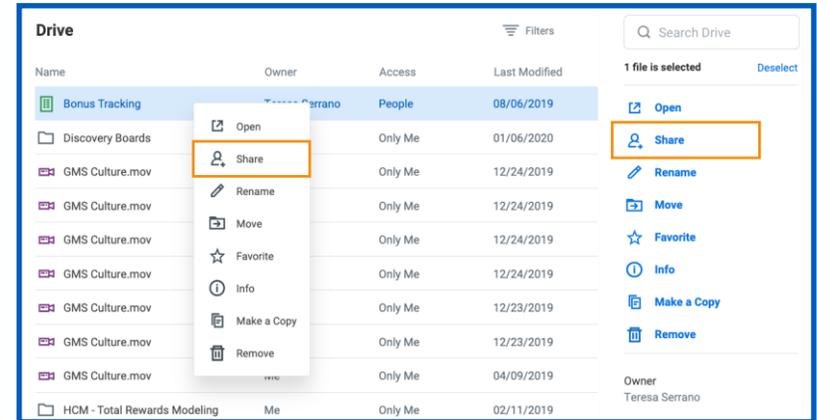
Report owners can now use link sharing and set permissions specific to that link for added security.



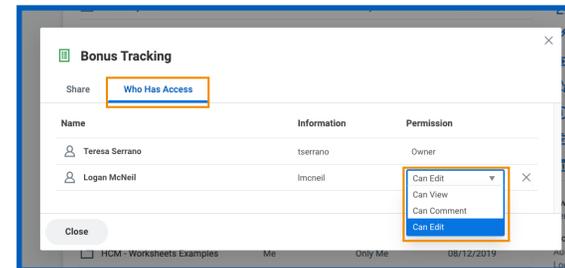
## SHARING AND SETTING PERMISSIONS

### GRANT SHARING PERMISSIONS

1. From Drive, select a workbook to share.
2. Right-click on the report and select **Share** to view the share workbook options.



3. Under Share with Others, add sharing permissions for one or more individuals you would like to have access. Permissions will default but can be adjusted.
4. Click **OK** to save your changes.

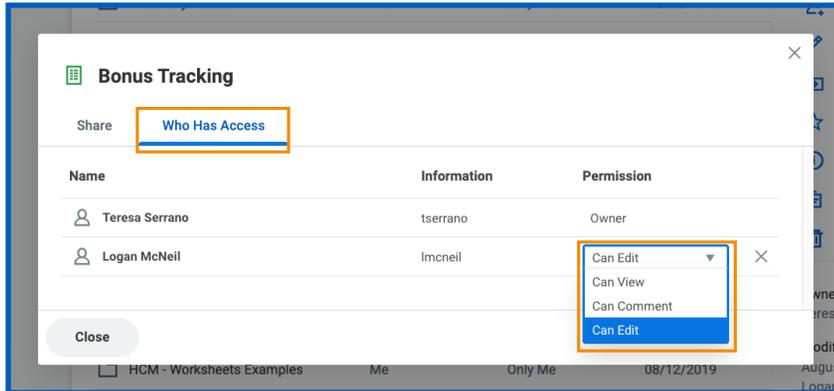


### CHANGE INDIVIDUAL SHARING PERMISSIONS

1. Within the workbook that you have shared, click the **Share** button.



- Update sharing permissions using the pull-down menu by each individuals' name.



- Click **OK** to save your changes.

## COMMENTS AND COLLABORATION

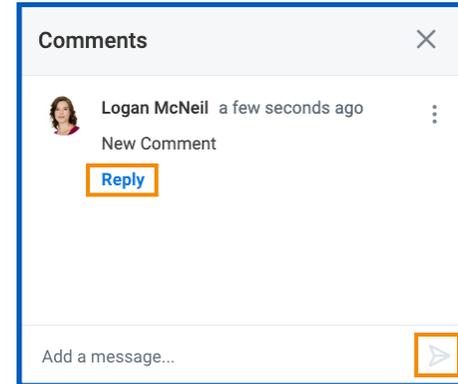
### VIEW COMMENTS

- From **Drive**, open a workbook.
- Click the **Comments** icon at the top of the page to view the comment thread.



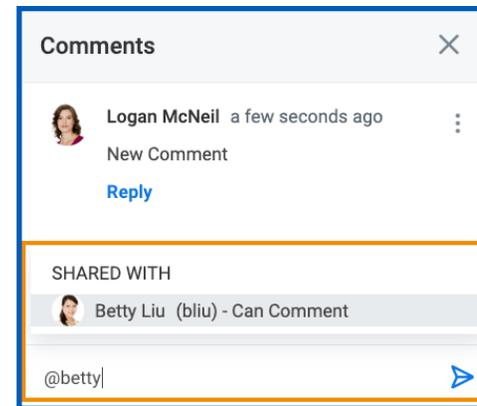
### REPLY TO A COMMENT

- In the comments section, click **Reply**.
- This will open the comment feed. Enter your response.
- Click **Send** icon.



### TAG A USER IN A COMMENT

- In a workbook, click the **Comments** icon.
- In the comments panel, click in the text box to leave a comment.
- Enter **@** and select the username of the individual the comment is for.

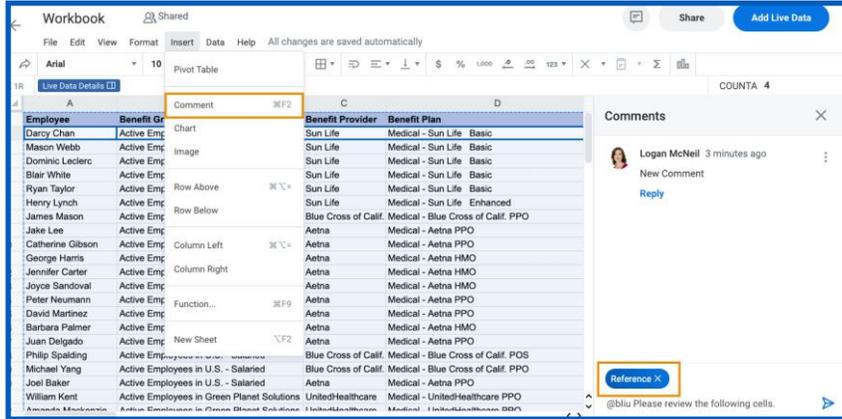


- Click **Send** icon to add the comment to the thread.

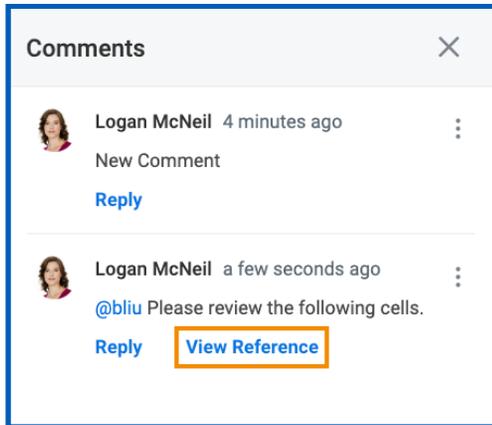
### REFERENCE WORKBOOK CELLS IN A COMMENT

- Select the cell you want to reference a comment to.

2. Select **Insert > Comment**.
3. A Reference link will appear above the comment text box. Fill out your comment.



4. Click **Send** to add the comment to the thread. Click View Reference link to show linked cells.



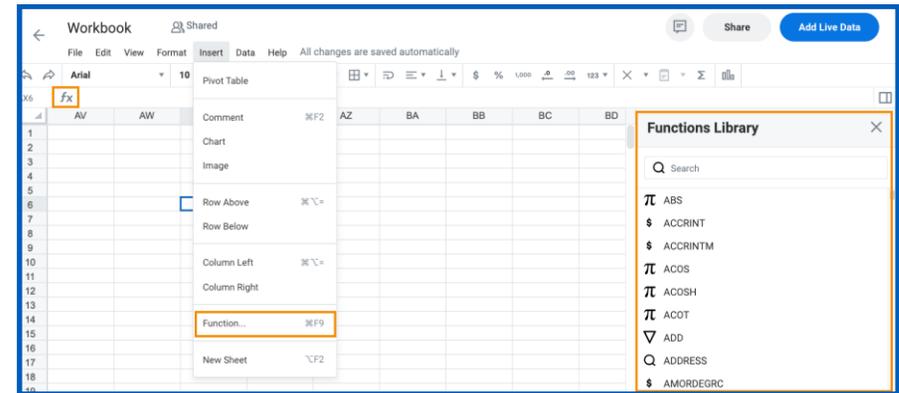
## WORKSHEET RESOURCES

There are three useful resources you can use in worksheets: the Functions Library, the Functions Reference, and the User Guide.

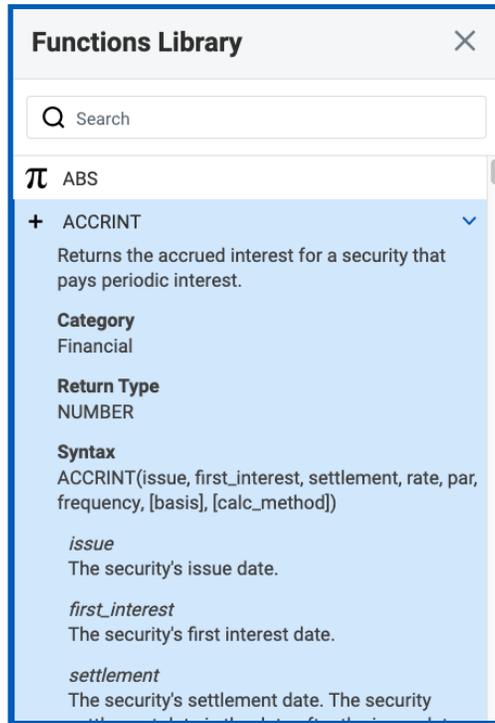
### FUNCTIONS LIBRARY

The Functions Library provides quick access to Workday functions and identifies the required syntax for the functions. This also includes a type-ahead feature that assists you as you build your formulas.

In a workbook, click **Insert > Function**, or click the **Function** icon.



The Functions Library panel will open on the right side of the screen.

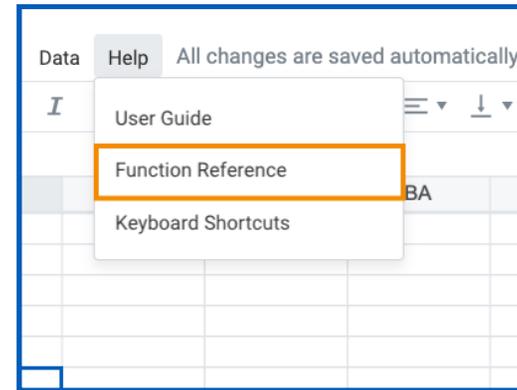


Here, you can search for a function, then reference the formula description and syntax.

## FUNCTIONS REFERENCE

The Functions Reference provides detailed formula descriptions, syntax, and examples to assist you.

1. In a workbook, click **Help** from the workbook menu.
2. Select **Functions Reference**.

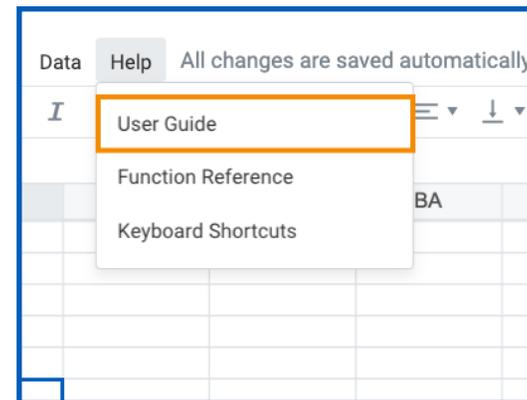


3. The Worksheets Function Reference opens. Within this document, you will find a detailed description of the functions, syntax, and examples of how functions are used and expected results.

## USER GUIDE

The User Guide provides information on Workday proprietary functions and other helpful features.

1. In a workbook, click **Help** to open a menu.
2. Select **User Guide**.



The Worksheets User Guide opens.