workday. | VUMC BUSINESS EDUCATION

# Workday Workbooks

This guide provides step-by-step instructions on how to use Workday to create custom Workbooks. Workbooks are an Excel like tool where users can create custom groups of reports used for monthly reporting, financial modeling, variance analysis, account reconciliation or other needs that may require a group of employees to collaboratively review reports.

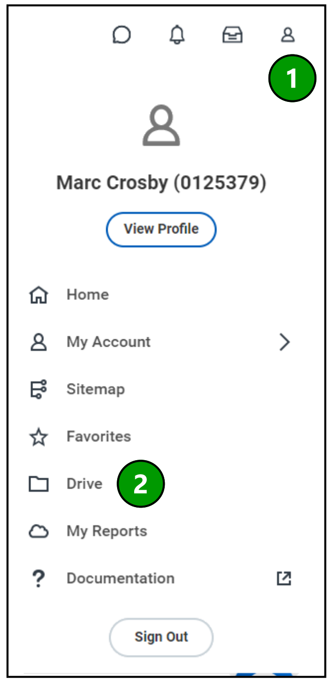
## Accessing Workbooks

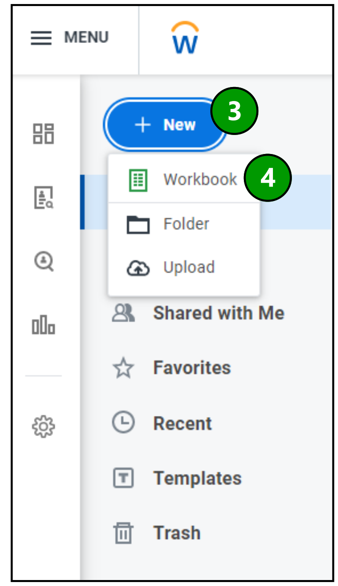
**From your homepage:**

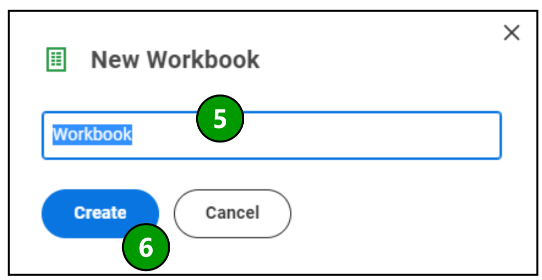
1. Click the **Profile** icon.
2. Click **Drive**.
3. Click **New**.
4. Click **Workbook**.
5. Give your new Workbook a name.
6. Click **Create**.

A blank Workbook will display.

**Note**: in step 4 users can create Folders that allow them to group Workbooks. Access can then be assigned by sharing Folder.



# Reporting Workbooks-Page 2

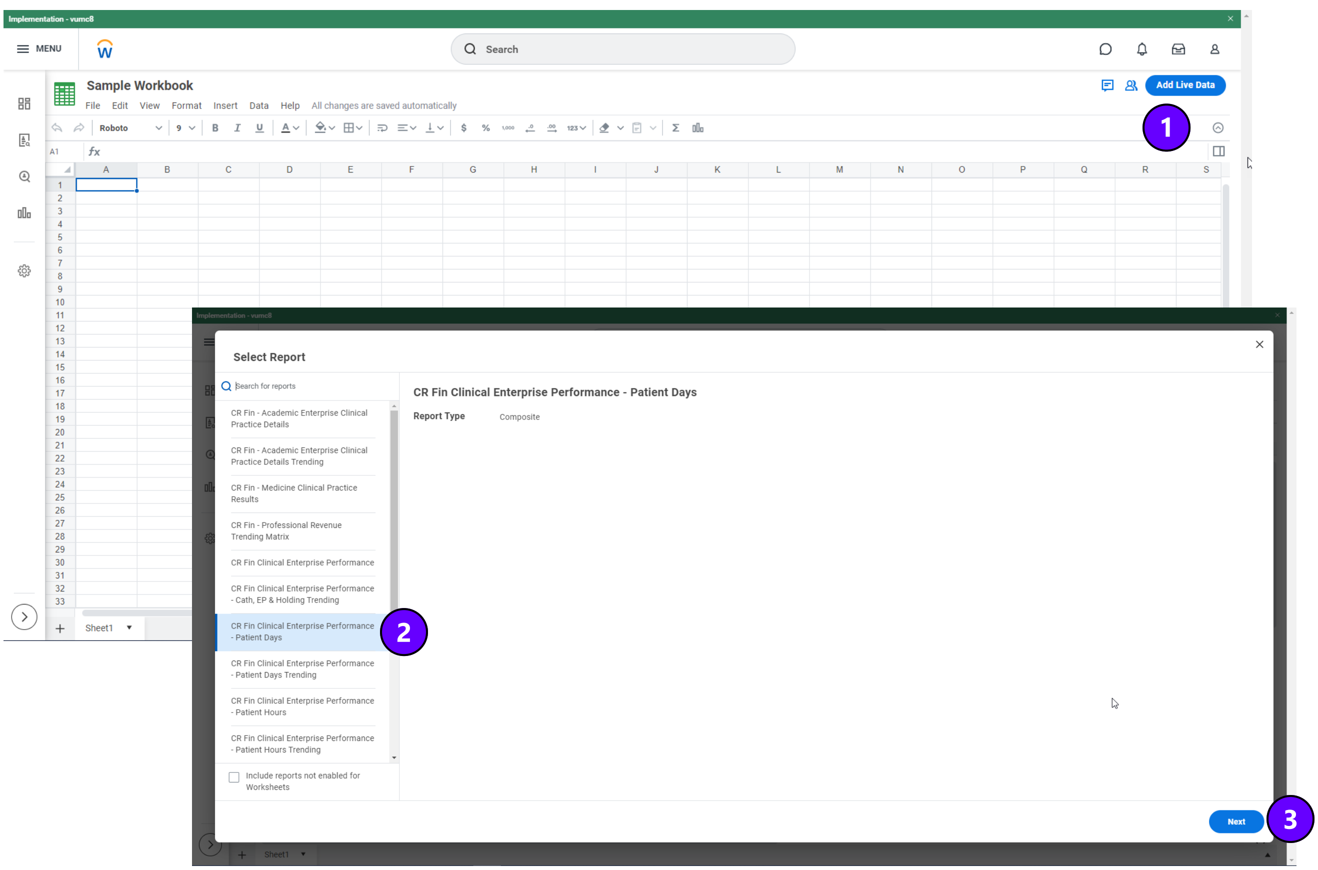
## Setting up Workbooks

Workbooks are similar to excel and have familiar functionality such as formulas, pivot tables, and the ability to add tabs at bottom for grouping additional reports.  The starting point for workbooks is a published report in Workday and Workbooks will include live data from Workday.

1. Click **Add Live Data**.

A list of Reports that can be added to your Workbook will display.  This list includes reports from HR, Finance, Research and Grants, and Supply Chain and will continue to expand as new reports are created.

2. Search for a report or select from the list.
3. Click the **Next** button**.**



# Reporting Workbooks-Page 3

## Setting up Workbooks

4. Enter Required Prompt Values for **Company**, **Organization**, and **Period**.

**Note**: Users can also narrow data by specific Worktags if desired.

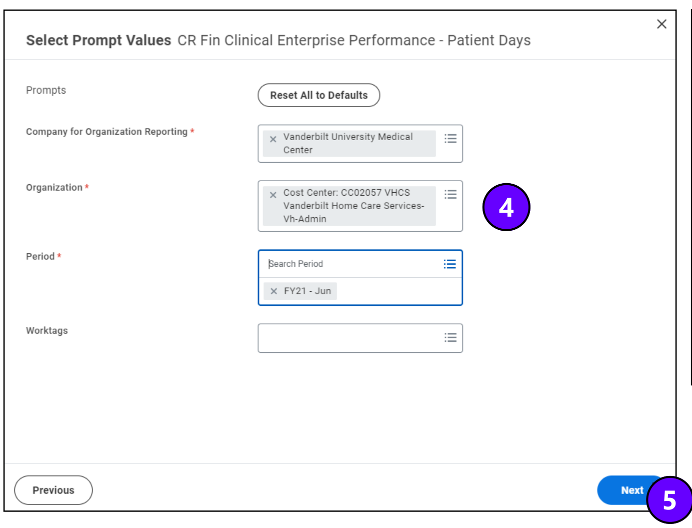
5. Click the **Next** button**.**

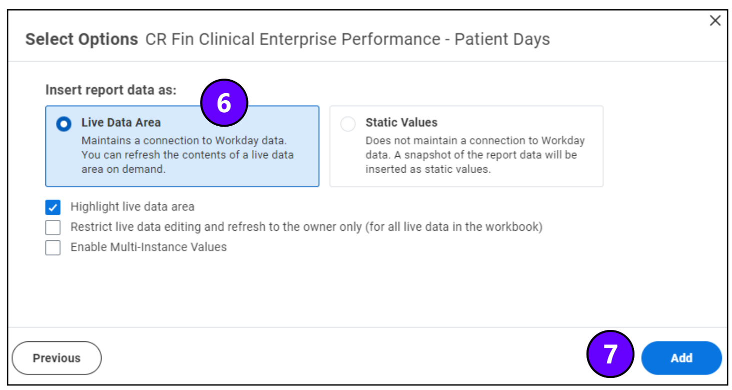
6. Select **Live Data Area.**

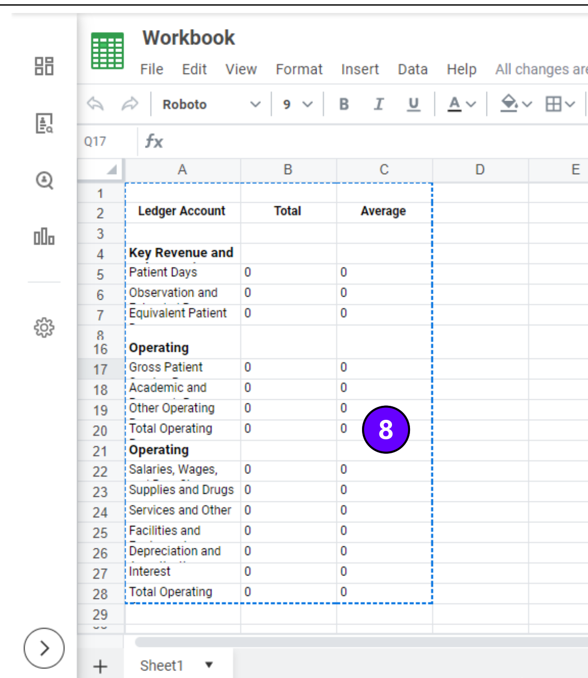
7. Click the **Add** button.

8. Your report populates inside the blue box and cannot be edited.

**Note**: Users can type in the Workbook outside of the blue box to add a header, add comments or notes. Reports within the workbook are updated per tab and require each tab to have the periods updated manually.



# Reporting Workbooks-Page 4

## Sharing Workbooks

Workbooks can be shared with employees to collaboratively review data. Visibility to data at the time the workbook is shared will **NOT** require a Workday Security check to ensure employees have purview over data.

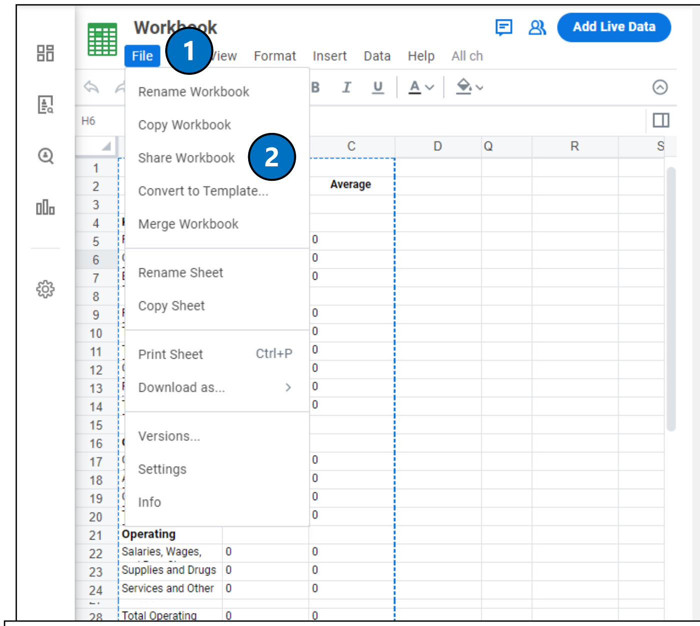
Follow these steps to share a Workbook.

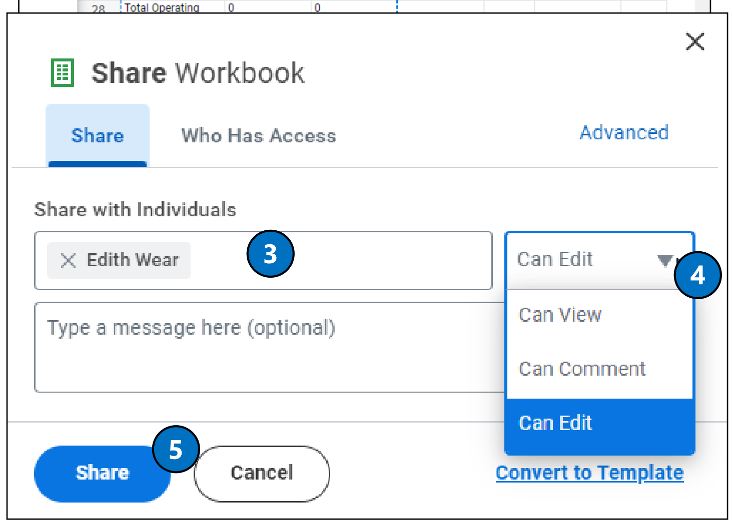
1. Click **File**.
2. Click **Share Workbook**.

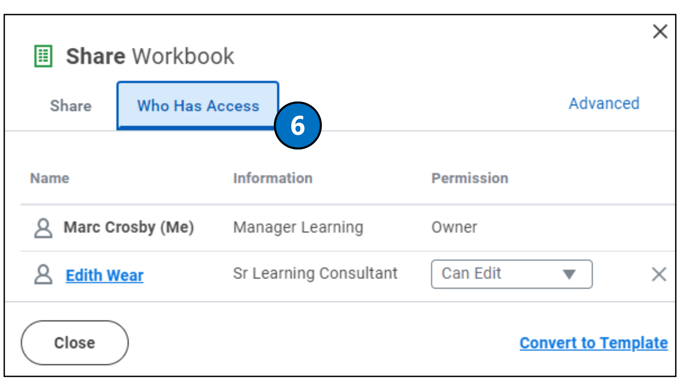
The Share Workbook page will display.

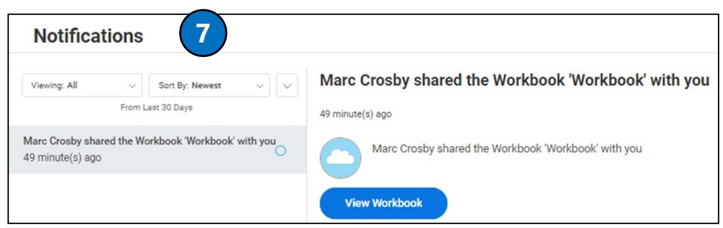
3. Enter the employee(s) you want to share the workbook with in the **Share with Individuals** field.
4. Select **Can View**, **Can Comment** or **Can Edit** Permission.
5. Click **Share**.
6. **Who Has Access** tab shows list of employees and their Permission for this workbook.
7. Employees will receiving an Inbox notification in Workday when a Workbook is shared.

**Important Note**: If Workbook data is later refreshed then visibility will be based on Workday security



# Reporting Workbooks-Page 5

## Refreshing Data in Workbooks

Refreshing data in a Workday Workbook will update data and run a security check to validate purview of all users the Workbook has been shared with.  Users can also Schedule Live Data Refreshes in Workday.

Follow these steps to Refresh data in you Workbook.

1. Click **Data**.
2. Click **Refresh All Live Data to update data within Workbook** (Security Check will run for all users with access).

The Security Message below will display. (See step 4)

3. Users can select to Schedule Live Data Refreshes when needed (Security Check will run for all users with access).
4. Click Confirm to Refresh all Live Data