



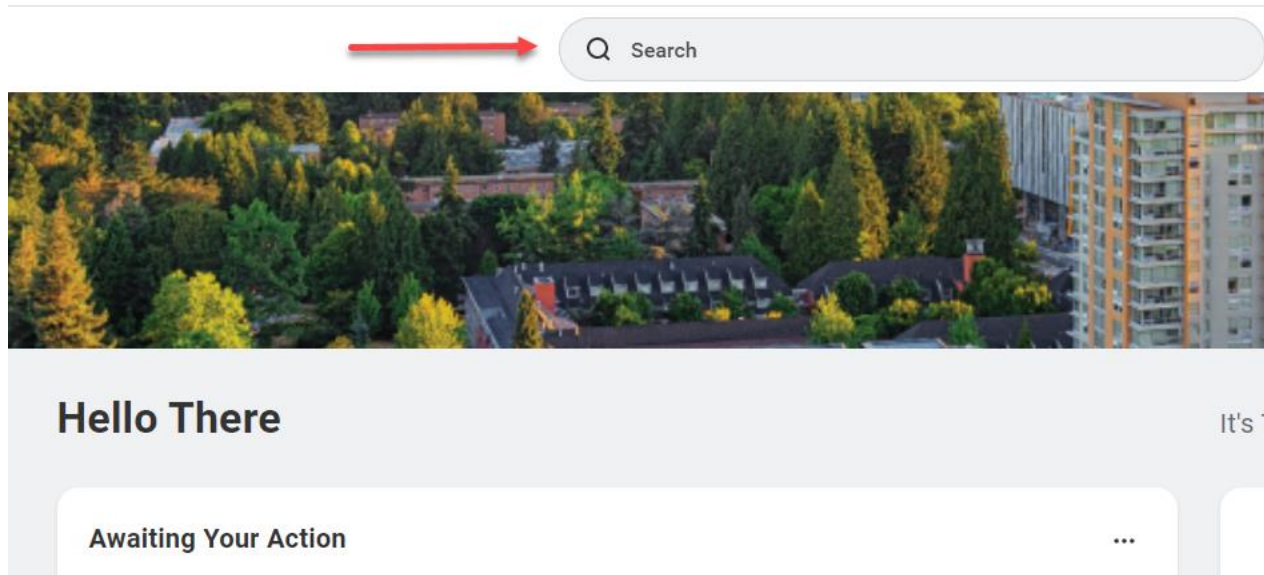
**GENERATING PRIVACY &
INFORMATION SECURITY REPORTS
FOR TRACKING TRAINING
COMPLIANCE**



PRISM SRS

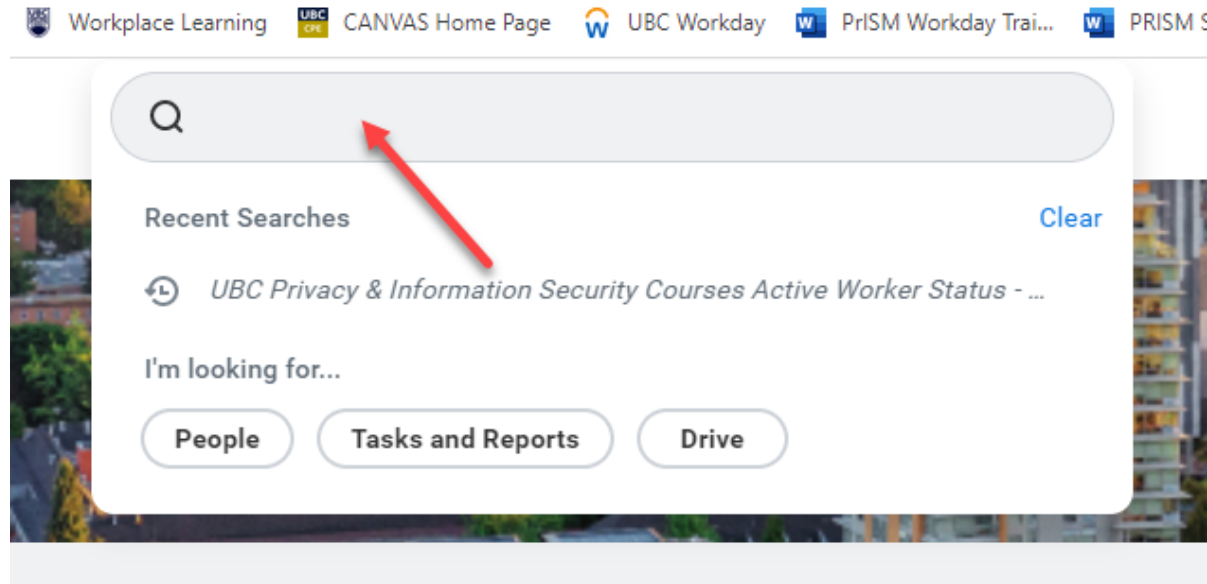
STEPS TO GENERATE PRIVACY AND SECURITY TRAINING REPORT

1. [Log into Workday with your CWL](#)



STEPS TO GENERATE TRAINING REPORT

2. In the search field input the report name: UBC Privacy & Information Security Courses Active Worker Status – Distributed and press enter.



STEPS TO GENERATE TRAINING REPORT

3. Once you press enter a Report Filter Screen pops up and has several options for filtering this report. Managers access to data is restricted based on authorization level.
 - A. Enter Workday Supervisory Organization Hierarchy Managerial Level
 - B. Worker – Enter First or Last Name to Search
 - C. Default - Only Active Workers in Workday will appear in this report. Workers who are not longer employed will be omitted.
 - D. Default - Exclude Workers classified as Retired Spousal Benefits (RSB) or if worker classified as unpaid in Workday, they will not appear in the report when this is flagged
 - E. Last Hire Date – Report will be based hire date going back in time
 - F. Department – Input to further filter the report
 - G. Faculty – Input to further filter the report

The screenshot shows a web-based filter interface with the following elements:

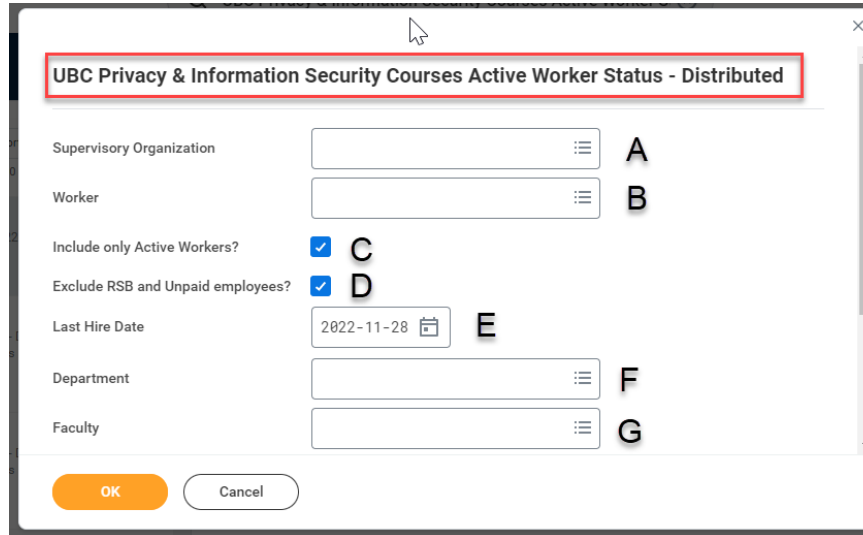
- Supervisory Organization:** A dropdown menu labeled 'A'.
- Worker:** A text input field labeled 'B'.
- Include only Active Workers?:** A checked checkbox labeled 'C'.
- Exclude RSB and Unpaid employees?:** A checked checkbox labeled 'D'.
- Last Hire Date:** A date input field showing '2022-11-17' with a calendar icon, labeled 'E'.
- Department:** A dropdown menu labeled 'F'.
- Faculty:** A dropdown menu labeled 'G'.
- Buttons:** An orange 'OK' button and a white 'Cancel' button.



STEPS TO GENERATE TRAINING REPORT – SECTION A

4. Section A - Supervisor Organization

- A.** Input your Workday Supervisory Organization Hierarchy Managerial Level. Search Options are your name (if manager), name of faculty or administration office.



The screenshot shows a search form titled "UBC Privacy & Information Security Courses Active Worker Status - Distributed". The form includes the following fields and options:

- Supervisory Organization:** A dropdown menu with a list icon and a large letter **A** next to it.
- Worker:** A dropdown menu with a list icon and a large letter **B** next to it.
- Include only Active Workers?:** A checked checkbox with a large letter **C** next to it.
- Exclude RSB and Unpaid employees?:** A checked checkbox with a large letter **D** next to it.
- Last Hire Date:** A date input field containing "2022-11-28" with a calendar icon and a large letter **E** next to it.
- Department:** A dropdown menu with a list icon and a large letter **F** next to it.
- Faculty:** A dropdown menu with a list icon and a large letter **G** next to it.

At the bottom of the form are two buttons: "OK" (orange) and "Cancel" (white with a grey border).



STEPS TO GENERATE TRAINING REPORT – SECTION A

5. Once you press enter this Report Filter Screen pops up and has several options: **Section A**

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization **A**

Worker

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date 2022-11-17

Department

Faculty

OK Cancel

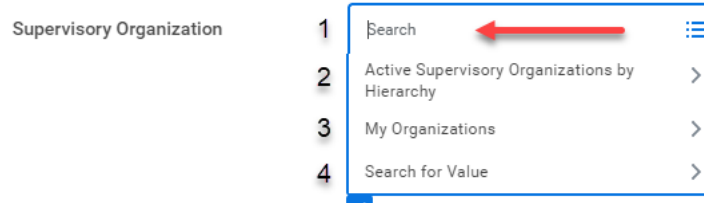
This search can be used to find names, departments or faculty

These 3 bars will open the drop down



STEPS TO GENERATE TRAINING REPORT – SECTION A

6. Once you press enter this Report Filter Screen pops up and has several options: **Section A**



The Search has 4 Options:

1. Search field is free form. Names, Faculty or Departments can be input here.
2. Active Supervisory Organization by Hierarchy – Each Manager will have access to the data for staff that report directly to them
3. My Organizations – This will list the organizations that the user has access to.
4. Search for Value – This will allow for you to search for a value



STEPS TO GENERATE TRAINING REPORT –SECTION A

7. In search field enter the search criteria. This can be a name, faculty or department. In this example, Privacy has been entered:

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization: Privacy |

Worker: Active Supervisory Organizations by Hierarchy >

Include only Active Workers?: My Organizations >

Exclude RSB and Unpaid employees? Search for Value >

Last Hire Date: 2022-11-25

Department: [Empty]

Faculty: [Empty]

OK Cancel



STEPS TO GENERATE TRAINING REPORT – SECTION A

8. Press Enter and the following result come up. Check the box for the group that the report needs to be generated for:

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization

Worker

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date

OK Cancel

Search Results (3)

- Privacy and Information Security | Safety & Risk Services | VP Finance and Operations (Susan Johnson)
- Information Support | Privacy and Information Security | Safety & Risk Services | VP Finance and Operations (Susan Johnson (Inherited))
- Information and Privacy | University Counsel Office (Paul Hancock)



STEPS TO GENERATE TRAINING REPORT – SECTION B

9. Section B – Managers can enter a workers name to only look at that one worker or a number of workers.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization A

Worker B

Include only Active Workers? C

Exclude RSB and Unpaid employees? D

Last Hire Date E

Department F

Faculty G



STEPS TO GENERATE TRAINING REPORT – SECTION B

10. Section B – Managers can enter a workers name to only look at that one worker or a number of workers.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization

Worker: liz

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date

Department

Faculty

Search Results (58)

- Student Salaried - Graduate Research Asst | Research | Benson-Amram Lab | Department of Forest and Conservation Sciences | Faculty of Forestry
- Liz | Project Coordinator | Privacy and Information Security | Safety & Risk Services | VP Finance and Operations
- Administrative Coordinator | Executive Administrative Support | President's Office
- Manager, Student Engagement | UBCO | Program Support | Student Engagement and Learning

OK Cancel



STEPS TO GENERATE TRAINING REPORT – SECTION B

11. Section B – Managers can enter a workers name to only look at that one worker or a number of workers.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization

Worker

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date

Department

OK Cancel

Search Results (58)

- Liz Student Salaried - Graduate Research Asst | Research | Benson-Amram Lab | Department of Forest and Conservation Sciences | Faculty of Forestry
- Liz Project Coordinator | Privacy and Information Security | Safety & Risk Services | VP Finance and Operations
- Liz Administrative Coordinator | Executive Administrative Support | President's Office



STEPS TO GENERATE TRAINING REPORT – SECTION B

12. Section B – Managers can search for a worker by location

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization

Worker

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date

Department

Faculty

OK Cancel

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization

Worker

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date

Department

Faculty

OK Cancel



STEPS TO GENERATE TRAINING REPORT – SECTION C & D

13. The Report Filter Screen options: C & D

C. Only Active Workers are required to take these courses If you want all workers including former workers unclick this box.

D. Only Paid Workers are required to take these courses. However, if you want to include unpaid workers unclick this box.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization A

Worker B

Include only Active Workers? C ←

Exclude RSB and Unpaid employees? D ←

Last Hire Date E

Department F

Faculty G

OK Cancel



STEPS TO GENERATE TRAINING REPORT – SECTION E

14. The Report Filter Screen options: E

E. Enter the hire date to view workers that have been hired prior to that date. For example, if you only wanted to review the status of workers who were hired prior to 90 days, then the date entered would be 2022-08-25 (90 days from Nov 17, 2022)

The image displays three sequential screenshots of the 'UBC Privacy & Information Security Courses Active Worker Status - Distributed' report filter screen. The first screenshot shows the filter options with labels A through G. The second screenshot shows the calendar for November 2022 with a date picker set to 2022-11-28. The third screenshot shows the calendar for September 2022 with a date picker set to 2022-09-17. Red arrows point to the date input fields in the second and third screenshots.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization: [Dropdown] A

Worker: [Dropdown] B

Include only Active Workers? C

Exclude RSB and Unpaid employees? D

Last Hire Date: 2022-11-17 E

Department: [Dropdown] F

Faculty: [Dropdown] G

OK Cancel

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization: Information Support | Privacy and Information Security | Safety & Risk Services | VP Finance and Operations (Susan Johnson (Inherited))

Worker: [Dropdown]

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date: 2022-11-28

Department: [Dropdown]

Faculty: [Dropdown]

Filter Name: [Text]

Manage Filters Save

1 Saved Filters

OK Cancel

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization: Information Support | Privacy and Information Security | Safety & Risk Services | VP Finance and Operations (Susan Johnson (Inherited))

Worker: [Dropdown]

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date: 2022-09-17

Department: [Dropdown]

Faculty: [Dropdown]

Filter Name: [Text]

Manage Filters Save

1 Saved Filters

OK Cancel



STEPS TO GENERATE TRAINING REPORT – SECTION F & G

15. The Report Filter Screen options: F – G

F. If you would like only a specific department, input here

G. If you would like a specific faculty, input here.

Then press OK to start generating the report based on the filters chosen or the filter can be saved.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization A

Worker B

Include only Active Workers? C

Exclude RSB and Unpaid employees? D

Last Hire Date E

Department F

Faculty G

OK Cancel



STEPS TO GENERATE TRAINING REPORT – SAVING FILTER

16. Filter Save

To save the filter created, give the filter a name in the text box and press the filter save button. This saved filter can be applied by opening the saved filter dropdown. Highlight the chosen filter and press enter. This will populate the filter options saved under that filter name.

Then press OK to start generating the report based on the filters chosen

Filter Name

Manage Filters

Save

0 Saved Filters

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Supervisory Organization

Worker

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date 2022-11-28

Department

Faculty

Filter Name

Manage Filters

Save

2 Saved Filters

Deborah Buzard

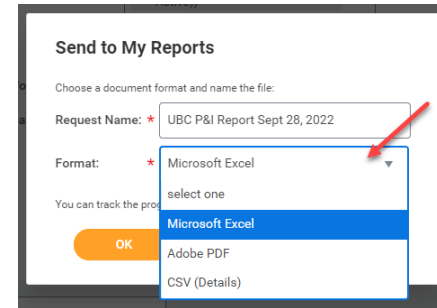
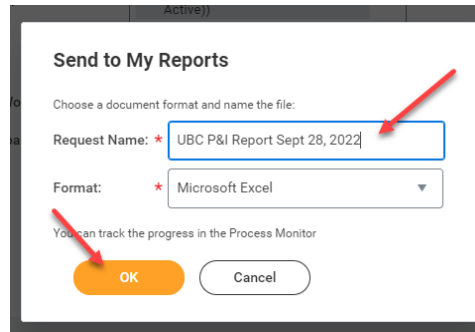
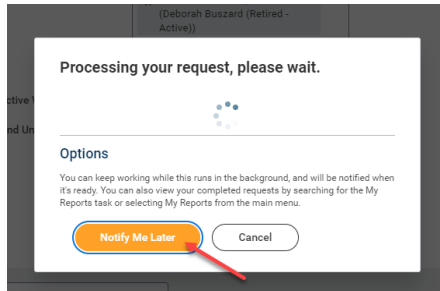
Leadership Office D.Buzard



STEPS TO GENERATE TRAINING REPORT – SAVING FILTER

17. Sending to My Reports

If the file is large and will take time to generate , there is the option to Notify Me Later. Input a Request Name (File Name) that is easy to remember. There is also an option in the Format field to define the file type. Once options are completed press OK.



STEPS TO GENERATE TRAINING REPORT – PROCESS MONITOR

18. Tracking in the Process Monitor

Once Ok has been pressed, the report will generate in the background until complete. Workday Notifications can be accessed by clicking on the Bell in the upper right corner of the Workday profile. The notifications screen will show the report as a Document available. Download the file by clicking on the blue highlighted file.

Send to My Reports

Choose a document format and name the file:

Request Name: * UBC P&I Report Sept 28, 2022

Format: * Microsoft Excel

You can track the progress in the Process Monitor

OK Cancel

MENU UBC Search

Notifications

Viewing: All Sort By: Newest From Last 30 Days

Document Available

30 second(s) ago

UBC P&I Report Sept 28, 2022 2022-11-28 15_30 PST.xlsx is now available in My Reports

Details UBC P&I Report Sept 28, 2022 2022-11-28 15_30 PST.xlsx

Document Available

Training Courses Taken (General) - Distributed Nov 25 2022 2022-11-25 09_18 PST.xlsx is now available in My Reports

3 day(s) ago

Document Available

Training Courses Taken (General) - Distributed Nov 25 2022 2022-11-25 09_09 PST.xlsx is now available in My Reports

3 day(s) ago

Document Available

UBC Privacy & Information Security Course Antics



STEPS TO GENERATE TRAINING REPORT – VIEWING REPORT

19. Viewing Report

If the file is small, then it will generate quickly and be viewable on screen. An excel file can be downloaded by clicking the generate excel file icon.

UBC Privacy & Information Security Courses Active Worker Status - Distributed

Worker Exclude RSB and Unpaid employees? Yes

Include only Active Workers? Yes Last Hire Date 2022-11-28

1 item

Employee ID	Worker	Email - Primary Work	Active Status	Hire Date	Employee Group	RSB/Unpaid Employee?	Job Code	Job Family	Supervisory Organization	Supervisory Organization - Hierarchy	Faculty	Department

Click to Generate Excel File



UNDERSTANDING THE TRAINING REPORT

Not all active workers are required to take these Privacy Courses due to their employment roles and responsibilities. Therefore there will be workers who may have taken the course but are not required to take them.

There are 4 possible outcomes for each worker:

- I. Yes(R) – Yes the Individual has completed the required course
- II. No(R) - No the individual has NOT completed the required course
- III. Yes(NR) – Yes the individual has completed the course but is NOT required to complete it.
- IV. No(NR) – No the individual has NOT completed the course but is NOT required to do so.

	PRISM Fund 1	PRISM Fund 2	PRISM IT Pro
Active Worker 1	Yes(R)	Yes(R)	Yes(NR)
Active Worker 2	No(R)	No(R)	No(NR)
Active Worker 3	Yes(NR)	Yes(NR)	No(NR)
Active Worker 4	No(NR)	No(NR)	No(NR)



COMMUNICATIONS ON TRAINING REPORTING

- Privacy Matters @ UBC (<https://privacymatters.ubc.ca/fundamentals-training>)
- Scroll to the bottom of the webpage
- Two Reports
 1. Active Worker lists Staff
 2. % Complete by Dept/Faculty

How to Track Training Results



Detailed Department Reporting

Training completion reports are accessible to managers and contain detailed employee training completion information. Managers can only report on the supervisory organizations they have access.

Managers can check the following training completion reports for all Privacy and Information Courses; Fundamentals 1 Fundamental 2 and IT Professional through Workday:

[UBC Privacy & Information Security Courses Active Worker Status - Distributed](#)

Need Help? (requires CWL)

To run this report, you will need to **click on the link then input your Supervisory Organization**. You may find your Supervisory Organization by clicking on your Workday Profile.

Need Help? (requires CWL)

[Complete the Workday Reporting Training](#)
[More information on running reports in Workday](#)
[How to run a report presentation](#)

VIEW REPORT →



Aggregated % Complete Report by Department

The Fundamentals and IT Professional aggregated training report enables self-service monitoring capabilities for authorized users to monitor campus-wide completion statistics for their own departments and units.

This report has been optimized to provide completion statistics for Fundamentals Part 1, Fundamentals Part 2 and IT Professional. (CWL is required to authenticate to the report)

Need Help?

Email privacymatters@ubc.ca if you require access for yourself or someone in your unit, or if you experience any issues with this service.

GO TO % COMPLETE REPORT →





THE UNIVERSITY OF BRITISH COLUMBIA

THANK YOU

THE UNIVERSITY OF BRITISH COLUMBIA