



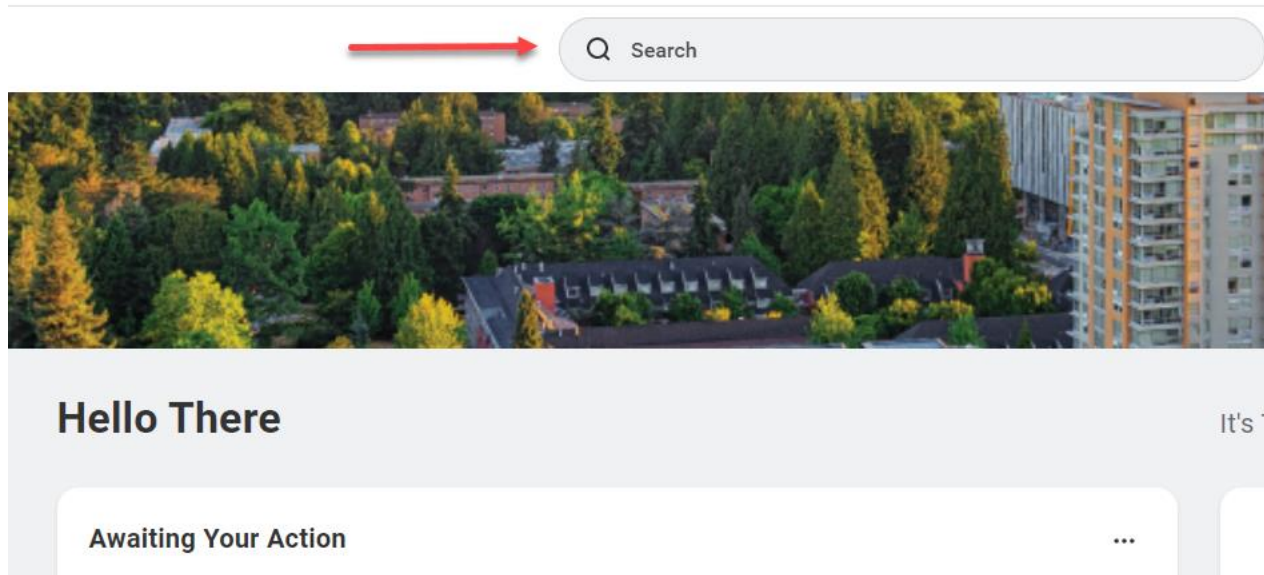
**GENERATING PRIVACY &
INFORMATION SECURITY REPORTS
FOR TRACKING TRAINING
COMPLIANCE**



PRISM SRS

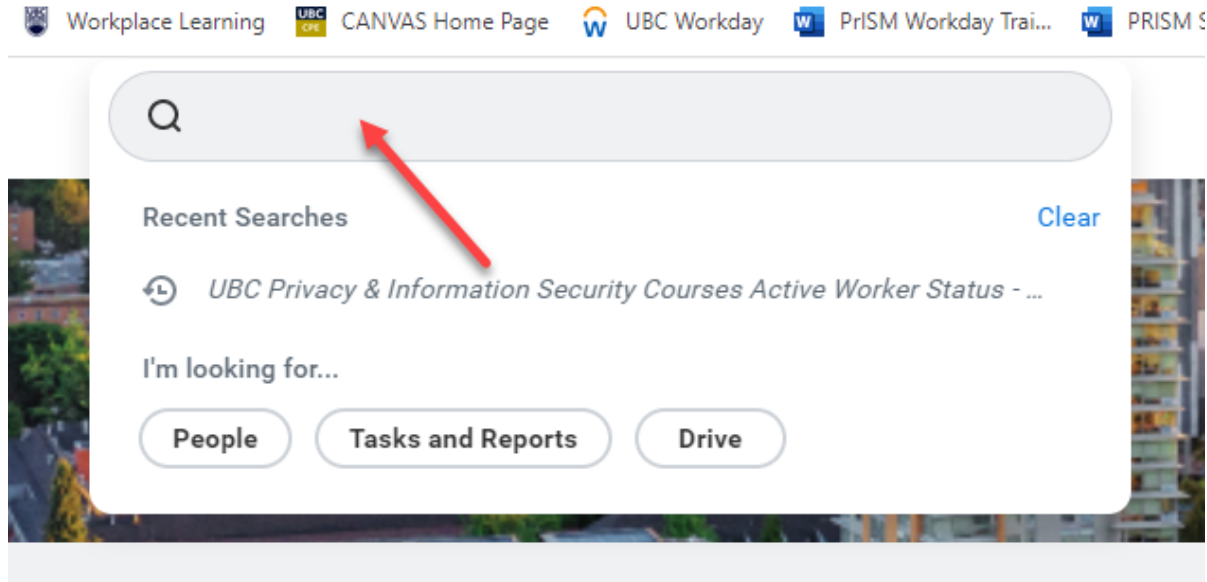
STEPS TO GENERATE PRIVACY AND SECURITY TRAINING REPORT

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



STEPS TO GENERATE TRAINING REPORT

2. In the search field input the report name: 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

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

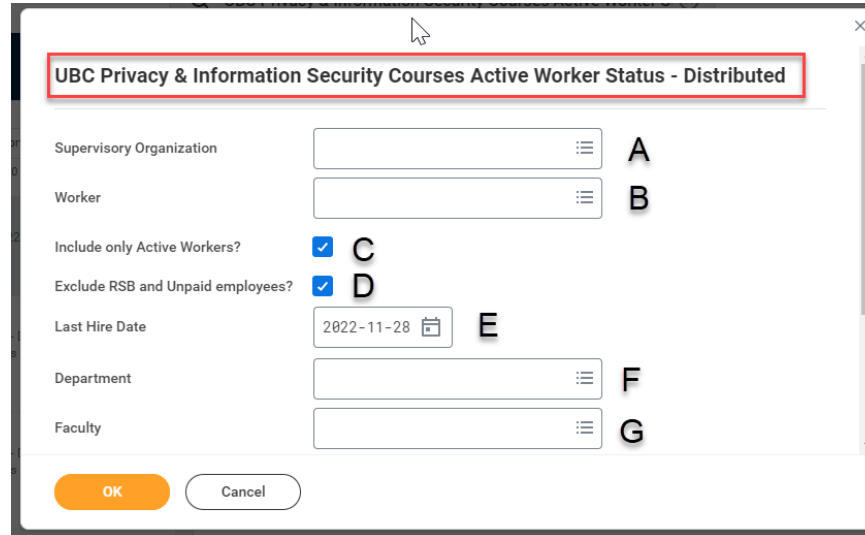
OK Cancel



STEPS TO GENERATE TRAINING REPORT – SECTION 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 dialog box titled "UBC Privacy & Information Security Courses Active Worker Status - Distributed". It contains several input fields and checkboxes:

- 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" and a calendar icon, with 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 dialog box 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

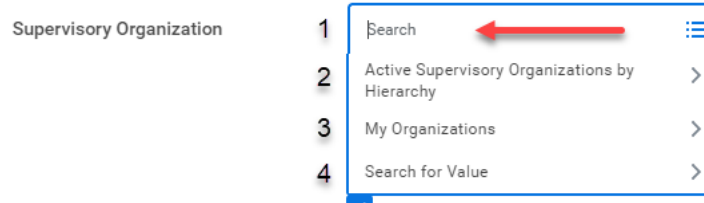
This search can be used to find names, departments or faculty

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

Include only Active Workers?

Exclude RSB and Unpaid employees?

Last Hire Date: 2022-11-25

Department

Faculty

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 screenshots illustrate the process of selecting a date for the 'Last Hire Date' filter. The first image shows the filter options with '2022-11-17' entered in the date field. The second image shows a calendar for November 2022 with the 17th selected. The third image shows a calendar for September 2022 with the 17th selected, demonstrating the selection of a date 90 days prior to the current date.



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.

The screenshot shows a web interface for generating a report. The title is "UBC Privacy & Information Security Courses Active Worker Status - Distributed". The interface includes several filter options:

- Supervisory Organization: A dropdown menu labeled A.
- Worker: A dropdown menu 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 with a calendar icon, showing "2022-11-17", labeled E.
- Department: A dropdown menu labeled F, highlighted with a red box and a red arrow pointing to it.
- Faculty: A dropdown menu labeled G, highlighted with a red box and a red arrow pointing to it.

At the bottom, there are two buttons: "OK" (highlighted with a red arrow) and "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

2 Saved Filters

Deborah Buzard

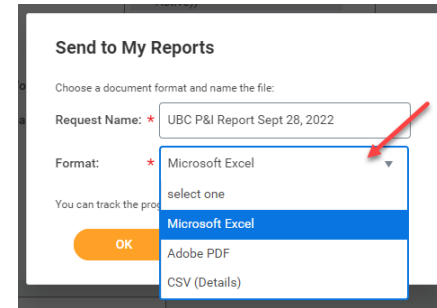
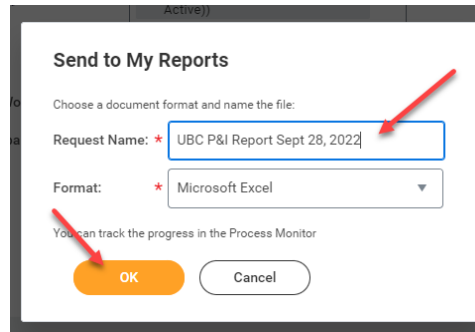
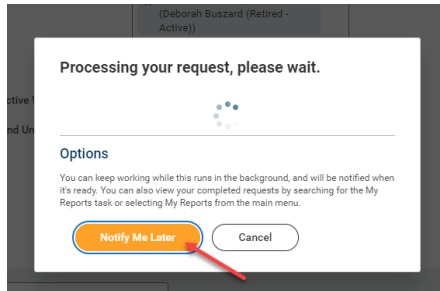
Leadership Office D.Buzard



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 **Workers Name** Exclude RSB and Unpaid employees? Yes **Click to Generate Excel File**

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



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*

How to Track Training Results



Detailed Department Reporting

The training completion reports are accessible to managers and contain detailed employee training completion information.

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](#)

To run this report, you will need to **click on the link**, **input the report name** in the search field and 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](#)

VIEW REPORTS →



Portfolio Reporting

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

This dashboard has been optimized to report completion statistics separately for Fundamentals Part 1 and Fundamentals Part 2.

(CWL is required to authenticate to the dashboard, hosted on the UBC Tableau service. Access to the portal is restricted to authorized users, including department champions, client service managers, and select administrative heads of unit).

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.

UBC transitioned their systems to Workday. After November 2, 2020, reporting updates will not be available until a new process is defined.

GO TO DASHBOARD →





THE UNIVERSITY OF BRITISH COLUMBIA

THANK YOU

THE UNIVERSITY OF BRITISH COLUMBIA