Contents

How to run reports for emailing Students 2
Overview 2
Can I Upload Non-Workday Files? 2
Delete Files After Use 2
How Many Students can I email at once? 2
Short Task Instructions 3
Course Section Roster with Grades – Central report 3
Student Program Details – Central report 3
Course Section Roster with Grades – Central report 4
Step 1: Launch the Course Section Roster with Grades – Central report 4
Step 2: Fill in the prompts 4
Step 3: Export the report 5
Step 4: Copy the Student IDs into the Find Students to Email Report 6
Step 5: Export the File 7
Student Program Details – Central report 8
Step 1: Launch the Student Program Details – Central report 8
Step 2: Fill in the prompts 8
Step 3: Export the report 10
Step 4: Copy the Student IDs into the Find Students to Email Report 10
Step 5: Export the File 12

How to run reports for emailing Students

Overview

To send communications to multiple Students, users will first need to extract Student information from reports which are then uploaded as a .xlsx file to the Student Communications Tool.

The following reports in Workday can be used to find Students for emailing.

Workday Report name	Use Case
Course Section Roster with Grades - Central	• Email all Students in a course section
Student Program Details - Central	• Email all Students in a Program

After running these reports, copy and paste the Student IDs into the **Find Students to Email** report. Do not upload any other report into the Student Communications Tool.

Can I Upload Non-Workday Files?

With recent changes to the Student Communications Tool, it is not possible to use non-Workday reports in the Student Communication Tool. This is because:

- The column headers/names in the reports used must match the following UBC Tags (keywords) in order to successfully map to the Student Communication Tool:
  - Legal Last Name
  - Preferred First Name
  - Student ID
- Reports maintained outside of Workday may not be updated regularly and could contain inaccurate information (such as an old preferred name) or mistakes (such as an incorrect Student ID).
- **Important:** The columns must follow this order, with no other columns in the Excel sheet: column A – Legal Last Name, column B – Preferred First Name, column C – Student ID. If there are other columns, please delete before uploading into the Student Communications file.

Delete Files After Use

While local excel files are required to send communications using the Student Communications Tool, it is strongly recommended that the files are deleted after the email has been sent by the user and received by the students.

How Many Students can I email at once?

The Student Communications Tool can handle 49,999-line items on the Excel file upload (50,000 including header) which will equal maximum of 49,999 recipients to be emailed at once. Please be aware that over 1,000 students in your file will cause a delay of a few minutes to render into the system.

Short Task Instructions

Course Section Roster with Grades – Central report

1. Launch the **Course Section Roster with Grades – Central report** from the Workday search bar, located on any Workday page
2. Fill in the prompts
3. Export the report to excel using the Export to Excel button
4. Select the Download button – the file should save to your Download folder on your local hard drive
5. Copy the Student IDs
6. Launch the **Find Students to Email** report and paste Student IDs
7. Export the report to excel using the Export to Excel button
8. Select the Download button – the file should save to your Download folder on your local hard drive

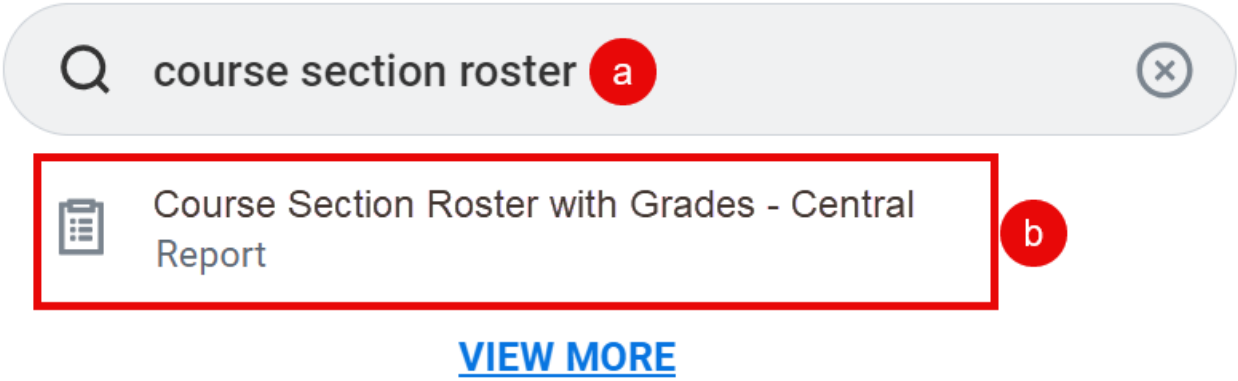
Student Program Details – Central report

1. Launch the **Student Program Details – Central report** from the Workday search bar, located on any Workday page
2. Fill in the prompts
3. Export the report to excel using the Export to Excel button
4. Select the Download button – this should save the file to your Download folder on your local hard drive
5. Launch the **Find Students to Email** report and paste Student IDs
6. Export the report to excel using the Export to Excel button
7. Select the Download button – the file should save to your Download folder on your local hard drive

Course Section Roster with Grades – Central report

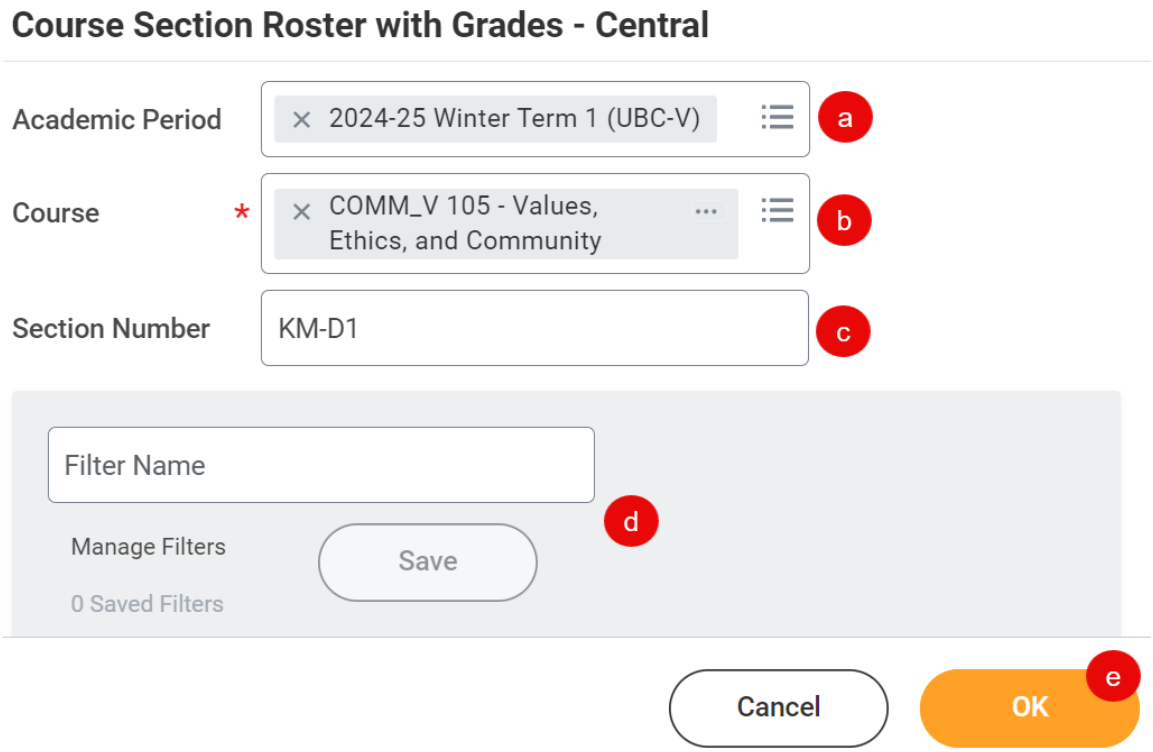
Step 1: Launch the Course Section Roster with Grades – Central report

a. On any Workday screen, type “course section roster” into the search bar
b. Select **Course Section Roster with Grades – Central report** from the search results



Step 2: Fill in the prompts

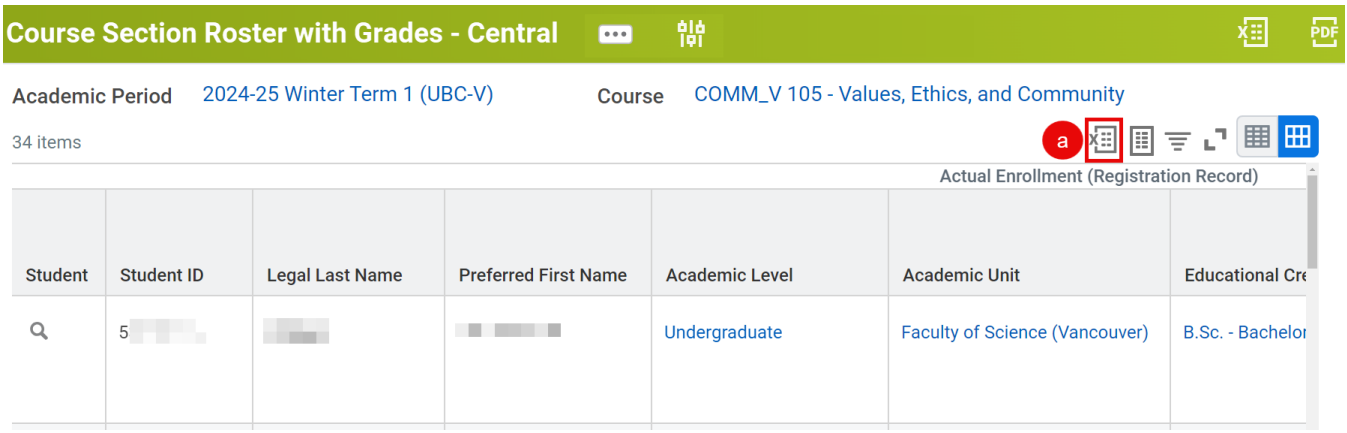
a. **Academic Period:** Search through the field or type an Academic Period (for example “Winter Term 1 2024”) and press Enter key on your keyboard to search.
b. **Course:** Search through the field. For example, COMM_V 105 Ethics and Community
c. **Section Number:** Enter the section number, for example KM-D1.
Note: it is recommended to check the section number is correct as spelling errors will display no results.
d. **(Optional) Create a filter:** Type a Filter Name and select Save
e. Select **OK**



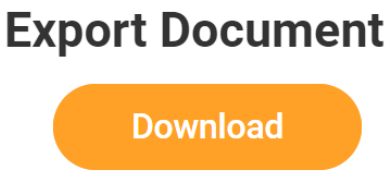
Last Updated: 31 October 2024

Step 3: Export the report

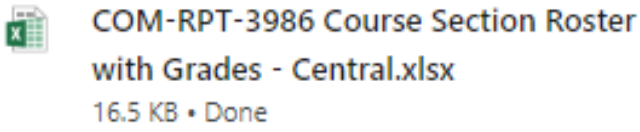
a. Select the Export to Excel icon



b. Select **Download**

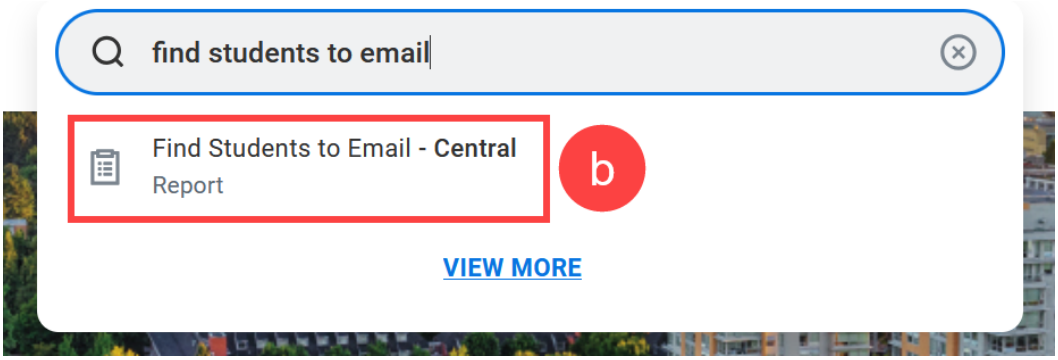


- The file will download to your Downloads folder on your local drive as an excel

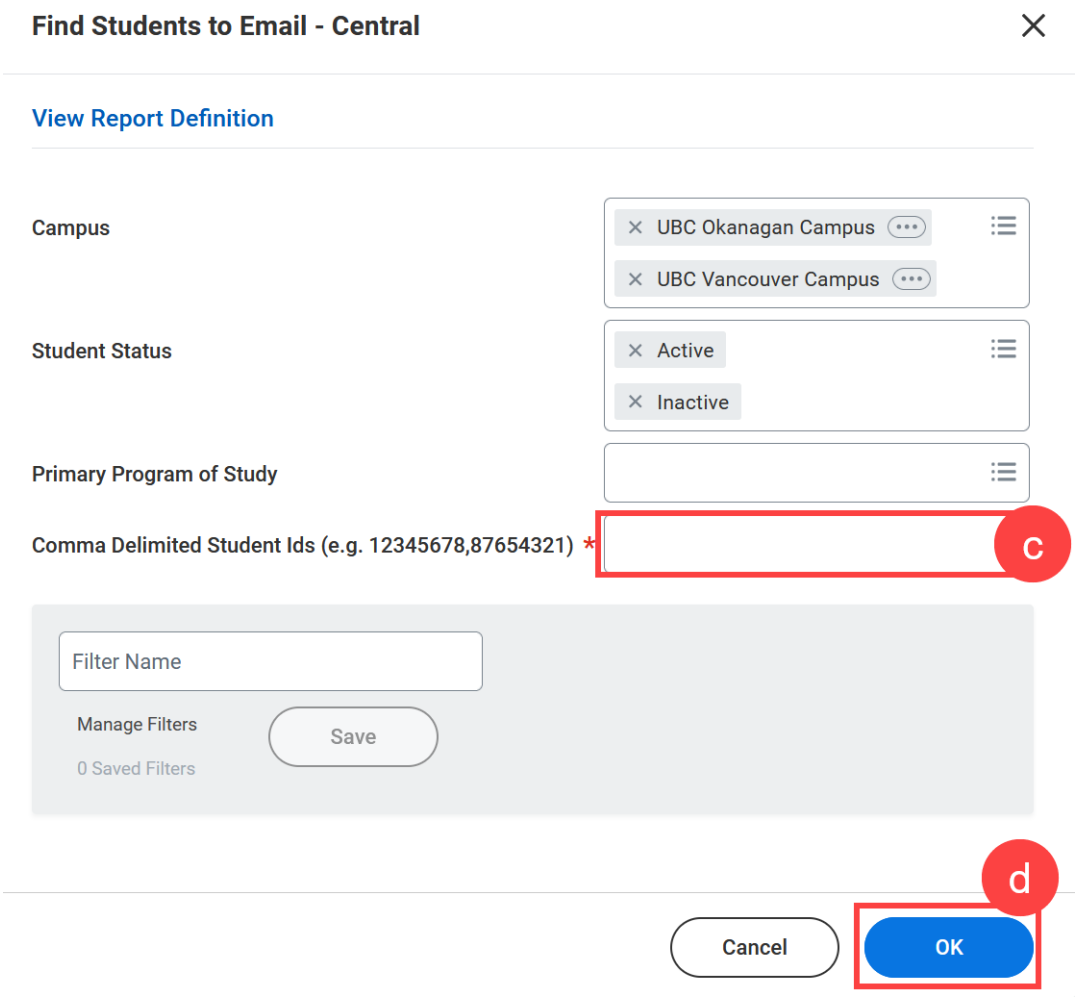


Step 4: Copy the Student IDs into the Find Students to Email Report

a. Copy the row of Student IDs in Excel
b. In Workday, launch the **Find Students to Email - Central** report



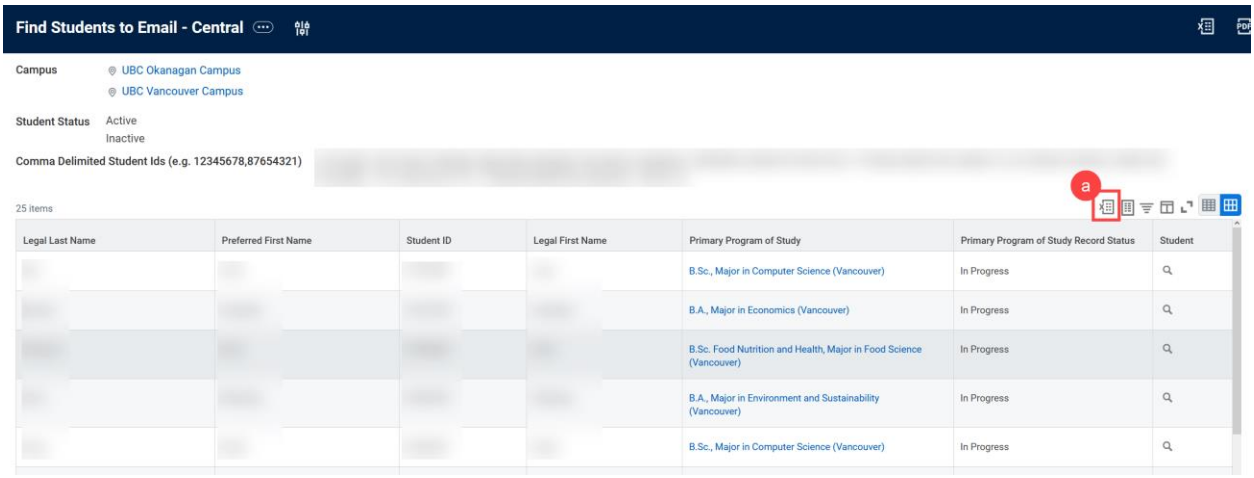
c. Paste the Student IDs into the **Comma Delimited Student Ids** field
d. Click **OK**



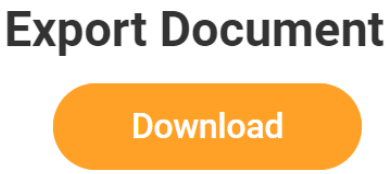
Last Updated: 31 October 2024

Step 5: Export the File

a. Select the Export to Excel icon



b. Select **Download**



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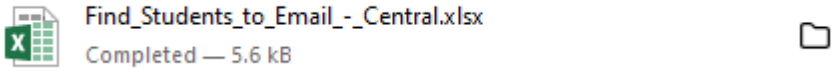


c. Email Students using the Student Communications Tool
d. Once you have finished emailing students, delete all files.

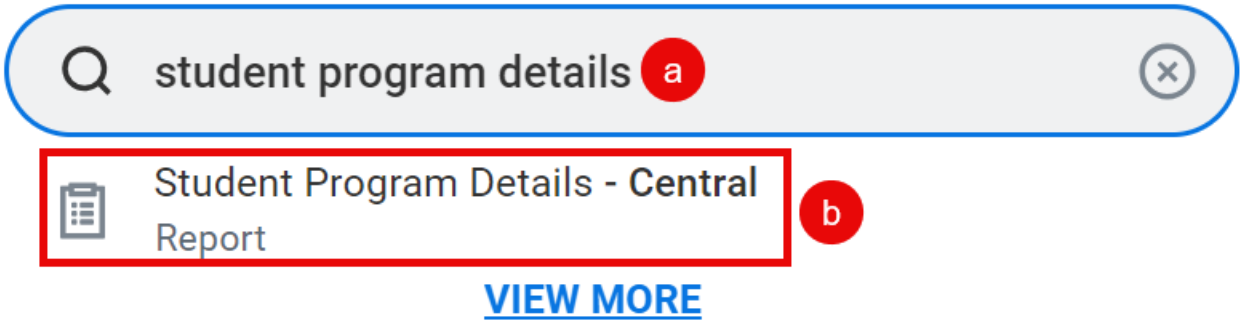
Data Security
It is critical that users are up to date and trained on data security to ensure that student information is protected and used appropriately. Users should note store this data on their local drives.

Please see How to Send Emails to Students using the Student Communications Tool training.

Student Program Details – Central report

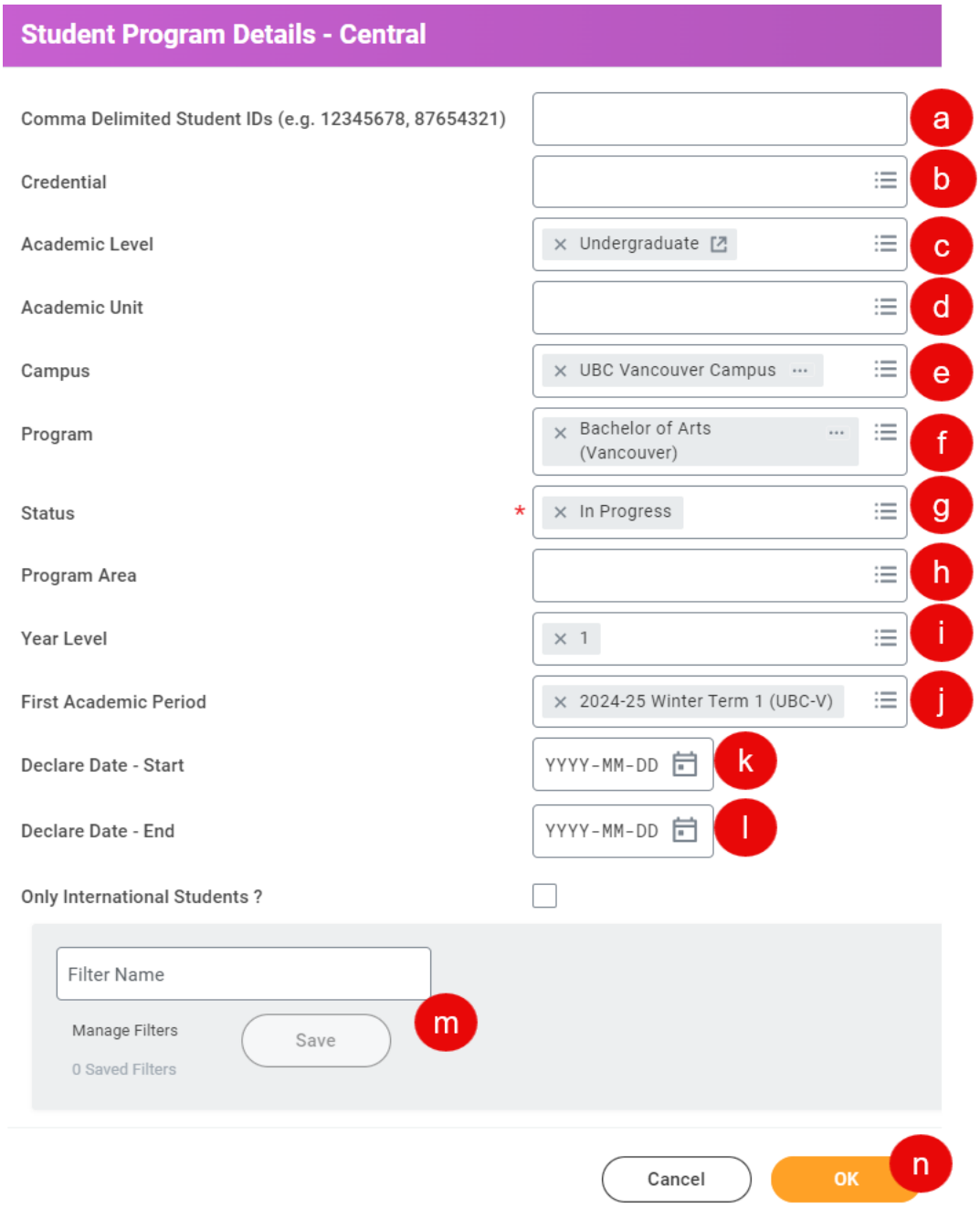
Step 1: Launch the Student Program Details – Central report

a. On any Workday screen, type “student program details” into the search bar
b. Select Student Program Details – Central report from the search results



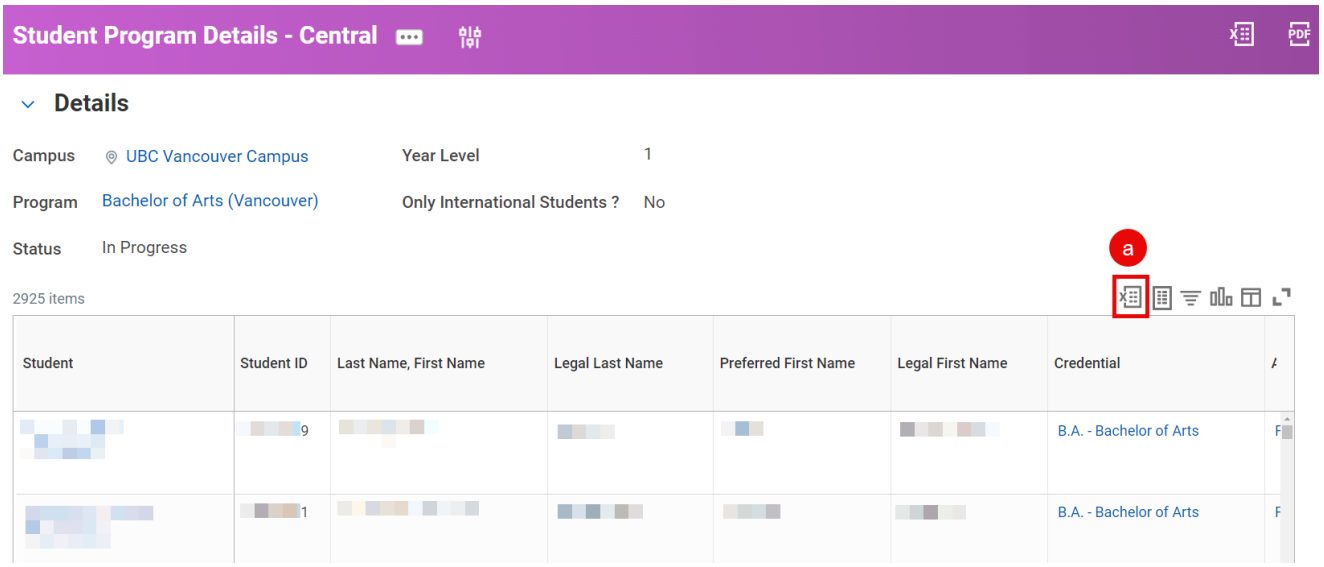
Step 2: Fill in the prompts

a. **Comma Delimited Student IDs (e.g. 12345678, 87654321):** Enter a range of Student numbers for the report to return all and only Students in that range.
b. **Credential:** Search through the field. For example, B.A – Bachelor of Arts
c. **Academic Level:** Search through the field. For example, Undergraduate.
d. **Academic Unit:** Search through the field. For example, Faculty of Arts.
Note: A student’s Academic Unit is typically the Faculty or School. To search by specialization, use the Program field.
e. **Campus:** UBC Okanagan Campus and UBC Vancouver Campus are pre-populated. Remove a campus by clicking ‘X’.
f. **Program:** Search through the field.
For example, B.A., General Program (Okanagan).
g. **Status (Required field):** Select one or more from the menu. For example, In Progress.
h. **Program Area:** Leave blank
i. **Year Level:** Select one or more from the menu. For example, 1.
j. **First Academic Period:** This is the student’s first session they attended UBC. Search through the field or type the Academic Period (for example, “2020-21 Winter Session UBC-V)”) and press the Enter key on your keyboard to search.
k. **Declare Date – Start:** Use if searching for a certain date either (i) the start date of the Student’s program of study and/or (ii) the date the Student declared their major or added their minor
l. **Declare Date – End:** Use if searching for a certain date either (i) the last date of the Student’s program of study and/or (ii) the date the Student finishes their major or their minor. Use with “Declare Date – Start” to create a range.
m. **Only International Students?:** Select the check-box to include only International Students in the report.
n. **(Optional) Create a Filter:** Type a Filter Name and select Save to create a filter for future use.
o. Select **OK**

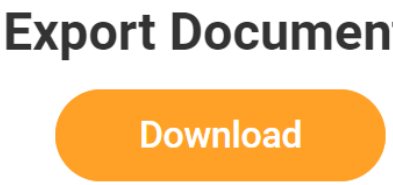

Student Program Details - Central
Comma Delimited Student IDs (e.g. 12345678, 87654321)
a
Credential
b
Academic Level
Undergraduate
c
Academic Unit
d
Campus
UBC Vancouver Campus
e
Program
Bachelor of Arts (Vancouver)
f
Status
*
In Progress
g
Program Area
h
Year Level
1
i
First Academic Period
2024-25 Winter Term 1 (UBC-V)
j
Declare Date - Start
YYYY-MM-DD
k
Declare Date - End
YYYY-MM-DD
l
Only International Students ?
Filter Name
Manage Filters
0 Saved Filters
Save
m
Cancel
OK
n

Step 3: Export the report

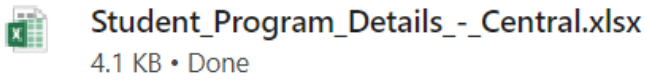
a. Select the Export to Excel icon



b. Select **Download.**



- The file will download to your Downloads folder on your local drive as an excel



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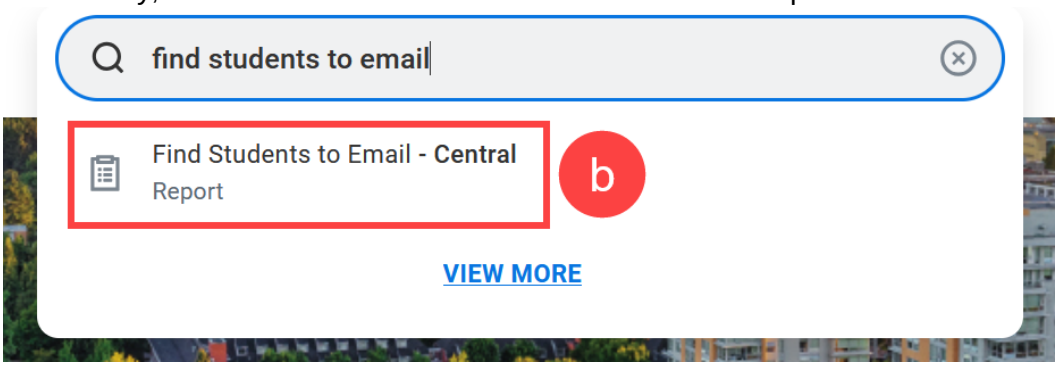
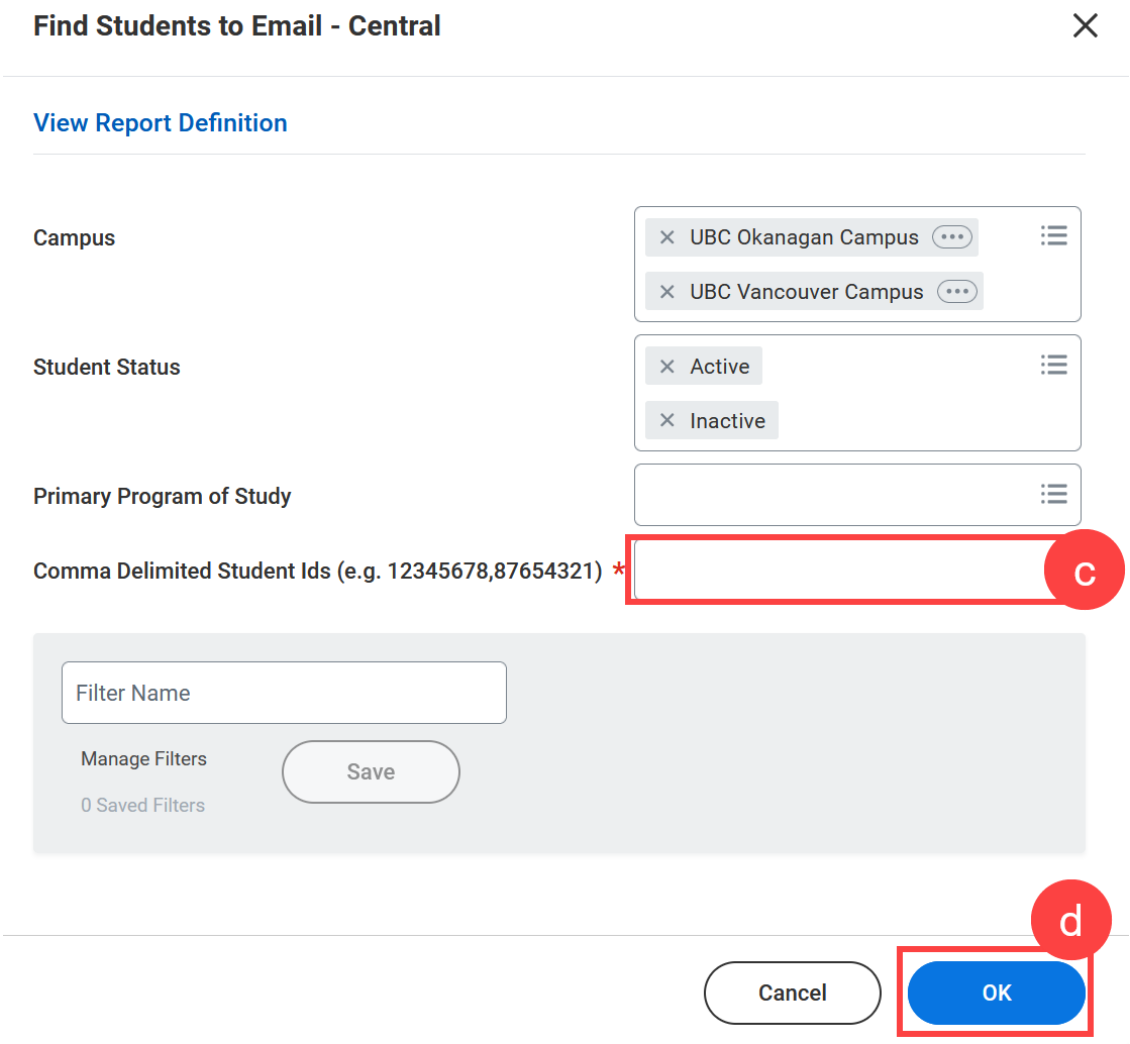
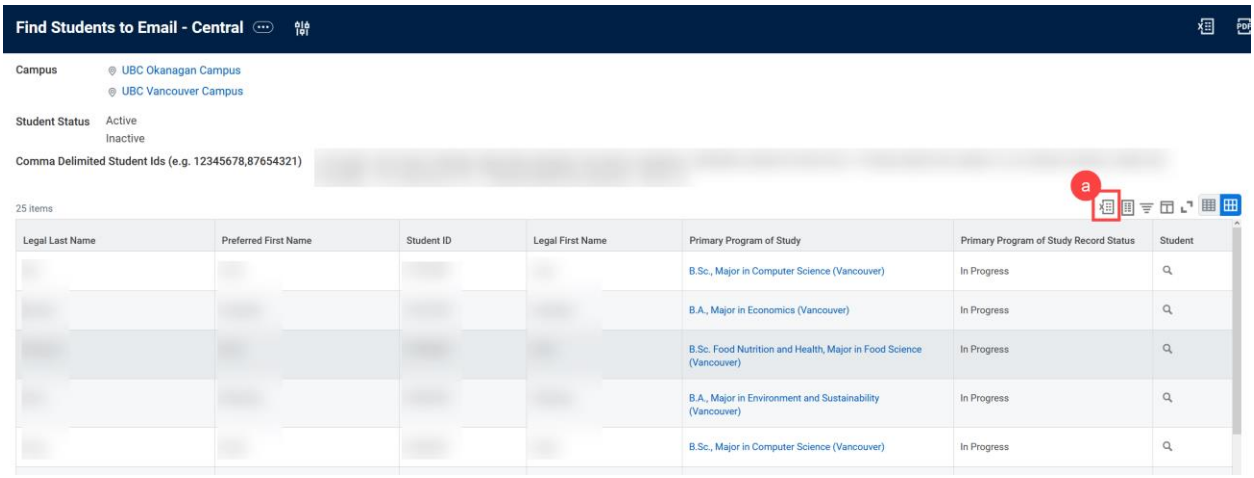


c. Paste the Student IDs into the **Comma Delimited Student Ids** field
d. Click **OK**

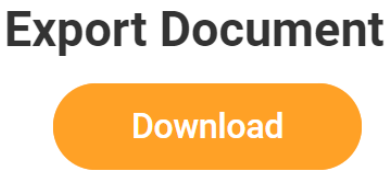


Step 5: Export the File

a. Select the Export to Excel icon



b. Select **Download**



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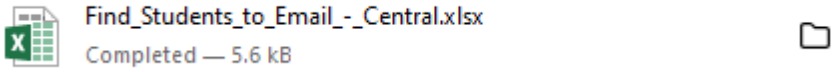

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