

# Workday Drive

Product Summary

July 23, 2026

This content is not part of the Workday Administrator Guide and is subject to further change.



# Contents

Summary of User Guide Changes - Drive..... 3

Concept: About Folders in Drive..... 3

Concept: Managing Files and Folders in Drive..... 5

Reference: Comparison of File Sharing and Folder Sharing Options..... 11

Reference: File Actions in Drive Based on File Type..... 12

Reference: File Actions in Drive Based on Permissions..... 16

Reference: Folder Actions in Drive Based on Permissions..... 18

Reference: Mobile Features and Usability Notes for Drive..... 20

# Summary of User Guide Changes - Drive

This table describes updates to the User Guide within the past year. We update the User Guide when new features impact the product user interface and when editorial changes improve content quality.

This page is intended to be a summary of content changes in the User Guide, and is not a full list of new features. If a new feature results in a change to only the Administrator Guide content, that change isn't described here.

| Date           | Notable Content Changes                          |
|----------------|--------------------------------------------------|
| March 2024     | Workday 2024R1 base version. No notable changes. |
| September 2023 | Workday 2023R2 base version. No notable changes. |

## Concept: About Folders in Drive

It's important to understand the rules associated with file and folder ownership and sharing.

### Folder Sharing Access and Permissions

Sharing a folder is an easy way to share a group of items as 1 action. When you share a folder with a user or group, you give them edit, comment, or view access to all the files and subfolders in that folder. You can share a folder if you own the folder or you have edit access to the folder. Folder owners might or might not own the items in the folder.

Keep in mind that if a user has access to a particular *item* in a folder because the *folder* was shared with them, you can't remove the user's access to the individual item; the X selection doesn't display for that user in the Who Has Access tab.

If you leave the company and your Workday status changes to terminated, any items that you owned and shared will remain available to the people you shared them with. Administrators can transfer ownership to another user.

As the owner of a folder, if you give edit permission to another user for that folder, they can add items to the folder; that user owns the created item.

Sharing permissions are either explicit or inherited:

- When you share a folder with a user or group, you're giving explicit access to it.
- When a user or group gains access to an *item* in a shared folder, or to a subfolder in the shared folder, this access is called inherited access.

If you want to give a user different levels of permission at different levels of a folder/file hierarchy, we recommend giving view permission at the higher level of the hierarchy and edit permission for individual files at the lower level. If a user has edit permission at a higher level, they can change their own lower level view permission to an edit permission.

### Moving Items Into and Out of Shared Folders

Users can move any items that either they own, or items in a folder that they can edit.

Users can move items to a folder they own or can edit, or to the Drive home view. If a user with shared edit access to a folder moves an item to their own folder, they continue to have access to the item. If a user

moves an item to their Drive home but the item isn't owned by them and wasn't explicitly shared with them, they lose access to the item.

Users with access to an item will have the same access permission when the item moves into a shared folder.

When a user moves an item out of a folder, Drive removes any share settings that were previously applied at the folder level.

### Removing (Moving to Trash) Drive Items

These rules apply when removing items (placing them in the Trash), including items in shared folders:

- Only an owner can remove a file or folder.
- Removing an item removes all its share permissions.
- Restoring an item doesn't restore its share permissions.
- If a workbook was originally created from an integrating application such as Workday Payroll or Planning, you can remove the workbook only if you disable the entry area first. Some integrating applications refer to disabling the entry area as locking.
- After removing a workbook, you can restore it only if you're the owner.

Drive administrators can permanently delete some types of Drive items by accessing the Drive Permanent File Delete task.

### Transferring Ownership of Individual Files or Folders

This section describes transferring ownership of items using the **Transfer Ownership** drop-down list in the **Share** dialog. Any Drive user who owns items can do this action.

Make sure that you already shared the file or folder with the person that you want to transfer ownership to. Then select to Share the item, and select Transfer Ownership in the permissions drop-down list for that user.

Only individual users (not groups) can own items in Drive.

When you transfer a folder, only the items in the folder that you own are transferred; non-owned items in the folder keep their existing ownership.

When you transfer ownership of a folder or file:

- Workday preserves the sharing settings and folder hierarchy for the transferred item.
- Your permission level for the item changes to Can Edit.
- The new owner can remove your access.
- If the transferred item is a Worksheets workbook:
  - You won't be able to edit any protected ranges.
  - Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.

### Ownership Transfer by an Administrator

When an administrator transfers ownership of items:

- Workday preserves the sharing settings and folder hierarchy for the transferred items.
- For transferred folders, Workday removes the folder hierarchy above the transferred folder (the folder containing the transferred folder), but the hierarchy remains unchanged for items inside the shared folder.
- For transferred folders, items that are owned by others are not transferred (those users retain their ownership).
- The original owner loses all permission for the item.

- For transferred Worksheets workbooks, Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.

### Copying Files

When you copy a file in Drive, you can select the destination folder for the copy by searching for it or navigating to it. If you don't select a destination, then the destination is the location of the original file. When you're copying an item from within one of the integrating products, such as copying a workbook from the Worksheets user interface or a presentation from Slides, the default destination might vary from what you see in Drive.

You can't copy folders.

## Concept: Managing Files and Folders in Drive

This table summarizes the primary actions that you can do with files and folders in Drive, if:

- You have the appropriate permissions.
- The administrator selected to manage that file type when setting up Drive.
- Drive supports the action for that file type.
- The application (such as Workday Slides or Workday Worksheets) is available on your system.

The table also lists actions you can do to customize the Drive user interface.

Available actions can vary depending on whether you're using the mobile app or the web browser. The table lists actions that are available on the web browser.

| Action                                                | Notes                                                                                                                                                                                                                                                                                                                                                               |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Upload files<br>Convert files to Worksheets workbooks | Select <b>Add New &gt; Upload</b> , or drag one or more files into the Drive page.<br><br>Drive automatically converts uploaded files to Worksheets workbooks if the file has the type XLS, XLSX, CSV, or HTML.<br><br>Drive automatically scans items for viruses when you upload them. Virus scanning doesn't apply to media files (videos and packaged content). |
| Create Worksheets workbook                            | From Drive, select <b>Add New &gt; Workbook</b> to create a new blank workbook.<br>From a Workday report, select <b>Export to Worksheets</b> to export Workday report data to create a new workbook.                                                                                                                                                                |
| Create Workday Slides presentation                    | Select <b>Add New &gt; Presentation</b> .                                                                                                                                                                                                                                                                                                                           |
| Create Workday Docs document template                 | Select <b>Add New &gt; Document Template</b> .                                                                                                                                                                                                                                                                                                                      |
| Create a discovery board                              | Select <b>Add New &gt; Discovery Board</b> .                                                                                                                                                                                                                                                                                                                        |
| Create a notification template                        | Select <b>Add New &gt; Notification Template</b> .                                                                                                                                                                                                                                                                                                                  |
| Preview or open a file                                | Select an item and then click <b>Open</b> , or double-click the item.<br><br>You can preview these item types: <ul style="list-style-type: none"> <li>DOC</li> <li>DOCX</li> <li>GIF</li> </ul>                                                                                                                                                                     |

| Action                          | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                 | <ul style="list-style-type: none"> <li>• JPEG</li> <li>• JPG</li> <li>• PDF</li> <li>• PNG</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Download a file                 | <p>Download options depend on whether download is enabled for that particular file type:</p> <ul style="list-style-type: none"> <li>• For supported items, select the item and then click <b>Download</b>.</li> <li>• For item types that don't have a viewer or previewer, when you double-click the item name you can download it.</li> <li>• For item types such as workbooks, Slides presentations, and notification templates, open the item and select <b>File &gt; Download As</b>, then select an available file type.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Filter the display of items     | <p>Select one of the views along the left side of the home page to see items in those categories, or click the <b>Filter</b> button at the top right for additional filtering options. Note that the My Files view is merely a filter that shows items you own; we don't recommend using this view for managing Drive items.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Share a file using a link (URL) | <p>You can share a file with many users at once by giving them a link, which you generate in the <b>Share</b> dialog.</p> <p>For each item that you want to share, make sure the recipient has permission to access that type of item in Workday. Example: If you want to share a Worksheets workbook, the person you're sharing with must have access to the Workday Worksheets product.</p> <ol style="list-style-type: none"> <li>1. Select a file in Drive, and click <b>Share</b>.</li> <li>2. Enable the <b>Link Sharing</b> option if it isn't already enabled. The ability to use link sharing is a system setting. If you don't see the option, check with your administrator to ensure that it's enabled.</li> <li>3. Select the permission level. Everyone who accesses the file using the link will have this level of access to the file.</li> <li>4. Click <b>Copy Link</b>. Give this URL to people you want to share the file with.</li> </ol> <p>When using link sharing, consider:</p> <ul style="list-style-type: none"> <li>• Drive supports link sharing for all Drive file types except discovery boards. You can't share folders using a link.</li> <li>• Some items (such as Worksheets workbooks or notification templates) require additional security permissions in order for the sharing recipient to view them.</li> <li>• Unlike sharing with individual users, when you share an item using a link, Workday doesn't send notifications. You might want to notify people that you shared an item with them; for example, you can email them a link.</li> <li>• If you enable link sharing for an item, any user with access to the related application can access the item if they have the URL.</li> <li>• In Drive, files that you share using a link display a <b>Link</b> icon next to the <b>Who Has Access</b> avatars. You can open the <b>Share</b> dialog by clicking the icon or an avatar.</li> <li>• If someone shares a file with you by sending you a link, the shared file doesn't display in Drive or in search results. The file displays in Drive</li> </ul> |

| Action                             | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
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|                                    | <p>only if they shared with you using the <b>Share With Individuals</b> area in the <b>Share</b> dialog.</p> <ul style="list-style-type: none"> <li>• If you change the permission level for the item later, the level of access updates immediately. Example: You originally set the Edit permission level and gave the link to Cara, who is now editing the file. If you change the link sharing permission level to View, Cara's permission changes immediately and she can no longer edit the file.</li> <li>• Individual file sharing settings in the <b>Share with Others</b> area of the <b>Share</b> dialog remain active if you turn off link sharing.</li> <li>• If you use link sharing for an item, and you also share it with individual users or groups, the person gets the highest of the possible permission levels. Example: You share a file with Bibi individually and give her View access. You also use link sharing and you set the permission level to Edit. Bibi has Edit permission for the file. If you later turn off link sharing, Bibi continues to have the View permission that you specified for her individually.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Share an item with security groups | <p>You can share an item with groups of users by typing the security group names in the <b>Share</b> dialog. The ability to use group sharing is a system setting for each Drive item type. If you don't see the option, check with your administrator to ensure that it's enabled.</p> <p>For each item that you want to share, make sure the recipient has permission to access that type of item in Workday. Example: If you want to share a Worksheets workbook, the person you're sharing with must have access to the Workday Worksheets product.</p> <ol style="list-style-type: none"> <li>1. Select an item in Drive, and click <b>Share</b>.</li> <li>2. In the <b>Share with Groups</b> area, select a permission level for the item in the <b>Permissions</b> drop-down menu.</li> <li>3. In the <b>Share with Groups</b> area, type the names of the groups that you want to share the item with.</li> <li>4. (Optional) If you're the item owner, you can click <b>Advanced</b> to select whether or not to let editors share the file, and whether to let commenters and viewers copy or print/download the file. These options aren't applicable to folders: all users you give folder edit access to can add, remove, and change permission for contributors; all users you share the folder with can download, copy, and print files in the folder.</li> </ol> <p>When sharing with security groups, consider:</p> <ul style="list-style-type: none"> <li>• Drive supports sharing with security groups for all Drive item types, including folders.</li> <li>• Unlike sharing with individual users, when you share an item with a group, Workday doesn't send notifications. You might want to notify people that you shared an item with them; for example, you can email them a link.</li> <li>• You can view and manage which groups have access (and the level of access) to a group-shared file in the <b>Who Has Access</b> tab of the <b>Share</b> dialog.</li> <li>• If you gain or lose membership in a group, you automatically gain or lose access to items that someone shared with that group.</li> <li>• If you use link sharing for an item, and you also share an item with a group, the group member gets the highest of the possible permission levels. Example: You share a file with the Managers group, which</li> </ul> |

| Action                              | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     | <p>Bibi is a member of, and give the group View access; you also use link sharing and you set the permission level to Edit. Bibi has Edit permission for the file. If you later turn off link sharing, Bibi continues to have the View permission that you specified for the Managers group.</p> <ul style="list-style-type: none"> <li>In general, groups that you share files with can see any data in the files, except: <ul style="list-style-type: none"> <li>For discovery boards, row level security applies, and groups see only the data they have access to.</li> <li>For workbooks, you can hide content, but if you allow users to copy the workbook, they can unhide the content after copying the workbook.</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Share an item with individual users | <p>You can share items in Drive with individual users. Sharing with individual users enables you to set a specific permission level for the person.</p> <p>For each item that you want to share, make sure the recipient has permission to access that type of item in Workday. Example: If you want to share a Worksheets workbook, the person you're sharing with must have access to the Workday Worksheets product.</p> <ol style="list-style-type: none"> <li>Select a file in Drive, and click <b>Share</b>.</li> <li>In the <b>Share with Individuals</b> area, select a permission level for the item in the <b>Permissions</b> drop-down, then enter the names of the users that you want to share the item with.</li> <li>(Optional) Type a message for the users you're sharing with. The message displays in the Workday notification that the users receive after you click <b>OK</b>.</li> <li>(Optional) If you're the item owner, you can click <b>Advanced</b> to select whether or not to let editors share the file, and whether to let commenters and viewers copy or print/download the file. Media (video and packaged content) files have an additional administrator setting that determines whether owners can allow viewers and commenters to copy or download. If the option to allow copy, download, and print is grayed out, this indicates that the administrator disabled the action.</li> </ol> <p>These special considerations apply for folder sharing:</p> <ul style="list-style-type: none"> <li>All users you give folder edit access to can add, remove, and change permission for contributors.</li> <li>All users you share the folder with can download, copy, and print files in the folder.</li> </ul> <p>When sharing with individual users, consider:</p> <ul style="list-style-type: none"> <li>Drive supports sharing files with individual users for all Drive item types, including folders.</li> <li>If you use link sharing for an item, and you also share an item with individual users or groups, the person gets the highest of the possible permission levels. Example: You share a file with Bibi individually and give her View access; you also use link sharing and you set the permission level to Edit. Bibi has Edit permission for the file. If you later turn off link sharing, Bibi continues to have the View permission that you specified for her individually.</li> <li>If you change the permission level for the item later, the level of access updates immediately. Example: You originally gave Can Edit permission to Cara, who is now editing the file. If you change the</li> </ul> |

| Action         | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
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|                | <p>permission level to View, Cara's permission changes immediately and she can no longer edit the file.</p> <ul style="list-style-type: none"> <li>When you share an item, the user receives a Workday notification and an email (if your administrator enabled email notifications).</li> <li>In general, users that you share files with can see any data in the files, except: <ul style="list-style-type: none"> <li>For discovery boards, row level security applies, and users see only the data that they have access to.</li> <li>For workbooks, you can hide content, but if you let users copy the workbook, they can unhide the content after copying the workbook.</li> </ul> </li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Edit an item   | <p>For item types that provide an editor, you can double-click the item name to open and edit it.</p> <p>For videos:</p> <ol style="list-style-type: none"> <li>Double-click the file to open the <b>View Media</b> page.</li> <li>Click <b>Edit Media</b>.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Move an item   | Select the item and click <b>Move</b> ; then navigate to the location where you want to put the file.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Copy an item   | When you copy a file in the Drive user interface, the default destination is the location of the original file. You can navigate to a different location from the Copy dialog. When you're copying an item from within one of the integrating applications, such as copying a workbook from the Worksheets user interface or a presentation from Slides, the default destination might vary from what you see in Drive.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Rename an item | <p>Right-click the item name and select <b>Rename</b>.</p> <p>For video files:</p> <ol style="list-style-type: none"> <li>Double-click the file to open the <b>View Media</b> page.</li> <li>Click <b>Edit Media</b>.</li> <li>Click the pencil (Rename) icon to rename the file.</li> </ol> <p>The <b>Edit Media</b> button displays for videos (but not packaged content) if these conditions exist:</p> <ul style="list-style-type: none"> <li>You have the <i>Manage: Media</i> level of access.</li> <li>You're the owner of the video or the owner gave you edit permission.</li> </ul> <p>Renaming an item in Drive updates the file name:</p> <ul style="list-style-type: none"> <li>In Drive.</li> <li>When someone opens the item using a shared link or directly in Drive.</li> </ul> <p>In a Help article, if you attached a Drive file or added a link from a Drive file, the file continues to open after being renamed. We recommend that you update the value in the <b>Text</b> field to match the renamed file. Example:</p> <ol style="list-style-type: none"> <li>In an article, use <b>Insert Link</b> to link to a file in Drive, or use <b>Insert Media or File &gt; Select from Drive</b> to attach the Drive file <b>2022 Results</b> to an article. In the <b>Text</b> field, type 2022 Results.</li> <li>Rename the file in Drive to <b>2023 Results</b>.</li> <li>Navigate to the article in the Help Article Workspace, select to <b>Edit</b> the article, and update the value in the <b>Text</b> field to 2023 Results.</li> </ol> |

| Action                                                       | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| Replace an item                                              | <p>Select the item and click <b>Replace</b>; then navigate to the replacement file.</p> <p>The replace action preserves sharing permissions and the link to the file. When a user selects a link that previously opened the original file, it opens the replacement file instead.</p> <p>Drive currently doesn't support these files for replacement:</p> <ul style="list-style-type: none"> <li>• Discovery boards</li> <li>• Document templates</li> <li>• Media files (ZIP, SCORM, and video/audio files)</li> <li>• Notification templates</li> <li>• Slides presentations</li> <li>• Worksheets workbooks and templates</li> </ul> <p>As you use the new feature, consider:</p> <ul style="list-style-type: none"> <li>• Drive doesn't save the original, replaced file after it's replaced.</li> <li>• For file types that Drive automatically converts to Workday files, such as converting XLSX or CSV files to Worksheets workbooks, the conversion does not occur for the new replaced files.</li> <li>• The replacement file type must be the same as the original file type.</li> <li>• You can rename a file during the replace action.</li> <li>• You can't undo the replace action.</li> <li>• In a Help article, if you used <b>Insert Media or File &gt; Select from Drive</b> to attach a Drive file to the article, Drive doesn't replace the attached file with the new file. An attached file is a <i>copy</i> of the original Drive file and isn't associated with the file in the article.</li> <li>• In a Help article, if you used <b>Insert Link</b> to add a link to a Drive file, we recommend that you update the value in the <b>Text</b> field to correspond to the renamed file. Drive doesn't update the <b>Text</b> field with the name of the replaced file.</li> </ul> |
| Remove to the <b>Trash</b> folder and recover from the trash | <p>From the Drive Home page, right-click the file or folder and select <b>Remove</b> to move it to the <b>Trash</b> folder. After you move an item to the trash, no other users can access it even if you previously shared it with them.</p> <p>To restore an item, from the Drive Home view select the <b>Trash</b> icon. Select the row containing the item and then click the <b>Restore</b> icon. Workday places restored items in the Drive Home view.</p> <p>If you remove an item that someone shared with you, you remove yourself from the list of shared users. The item disappears from your file view and it doesn't display in the <b>Trash</b>.</p> <p>Administrators can permanently delete some types of items from Drive.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Transfer ownership of individual files or folders            | <p>Make sure that you already shared the item with the person you want to transfer ownership to. Then select to <b>Share</b> the item, and select <b>Transfer Ownership</b> in the permissions drop-down list for that user.</p> <p>When you transfer ownership:</p> <ul style="list-style-type: none"> <li>• Your permission level for the item changes to Can Edit.</li> <li>• The new owner has the ability to remove your access.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

| Action                                       | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                              | <ul style="list-style-type: none"> <li>If the transferred item is a Worksheets workbook: <ul style="list-style-type: none"> <li>You won't be able to edit any protected ranges.</li> <li>Worksheets cancels any existing live data update schedules; the new owner must create a new schedule.</li> </ul> </li> </ul> <p>Only individual users (not groups) can own items in Drive.</p>                                                                                                                                                                                                                                                                                                                                                                                                             |
| Transfer ownership of several workbooks      | Only administrators can do this action. See <i>Transfer Ownership of Drive Items to a Different User</i> in the Administrator Guide, if you have the appropriate permissions, for details.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Customize the navigation pane                | <p>Click the <b>Settings</b> icon to:</p> <ul style="list-style-type: none"> <li>Assign a default (home page) view for Drive by dragging the item to the top of the list. The new default view displays when you sign in to Workday and navigate to Drive. If you open an item and then return to Drive, Drive shows the last used view.</li> <li>Reorder the standard filters in the navigation pane by dragging them to the desired position, or hide items by dragging them into the <b>Hidden Menu Items</b> list.</li> <li>Add one or more folders to the navigation pane for quick access, by clicking the <b>Add Folder</b> link. You can add up to 10 folders in the visible list of filters, and up to 100 folders total, including items in the <b>Hidden Menu Items</b> list.</li> </ul> |
| Navigate to a user profile from a Drive item | <p>Click the link on the:</p> <ul style="list-style-type: none"> <li>Info dialog <b>Owner</b>, <b>Created By</b>, and <b>Last Modified</b> fields.</li> <li>Share dialog <b>Who Has Access</b> field.</li> </ul> <p>The user information displays as regular text when the applicable user is the same as the user viewing the item.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Collapse or expand the right pane            | Click the arrow icon on the right pane divider.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

## Reference: Comparison of File Sharing and Folder Sharing Options

When you share a folder, the sharing options available to you are different from file sharing options. This table explains the key differences:

| File Sharing                                                         | Folder Sharing                                                                                                                                                                             | Notes                                                                       |
|----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| Sharing option: Commenters and viewers can download, copy, and print | All users you share the folder with can download, copy, and print files in the folder.                                                                                                     | To remove these abilities, open the individual file and change the setting. |
| Sharing option: Editors can share                                    | All users you give edit access to can add, remove, and change permission for contributors. If you originally create a file in an unshared folder and later you move it to a shared folder, | In a shared folder, you can't disable the Editors Can Share setting.        |

| File Sharing | Folder Sharing                                | Notes                                                    |
|--------------|-----------------------------------------------|----------------------------------------------------------|
|              | the Editors Can Share option becomes enabled. |                                                          |
| Link sharing | Not available for folders.                    | Link sharing is also not available for discovery boards. |

## Reference: File Actions in Drive Based on File Type

In general, Drive supports these file types:

- BMP
- CSV
- DOC
- DOCX
- DWXF (Workday Docs templates)
- GIF
- HTM
- HTML
- JPEG
- JPG
- JWF
- LPXF (Slides presentations)
- NDXF (Notification Designer templates)
- PDF
- PNG
- PPT
- PPTX
- SVG
- TIF
- TIFF
- TSV
- WXF (Worksheets workbook files)
- XLS
- XLSM
- XLSX
- XLTM
- XLTX

This list of file types doesn't apply to discovery boards, or to media files (videos and packaged content). Discovery boards are supported automatically. Workday enables or disables media file usage based on the status of the Workday Media Cloud Terms and Conditions order form.

This table summarizes the primary actions that you can do with files in Drive on a web browser, based on the file type.

Notes:

- The actions available to you vary depending on your permission level for the file type, whether the action is enabled, and whether the associated application is available on the system.
- Viewing and editing options might be limited if you're using the Workday mobile app.

- Actions available for users with Edit, Comment, or View access depend on the settings in the **Advanced** area of the **Share** dialog.

| File Type              | Actions                                                                                                                                                                                        | Notes                                        |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| Worksheets workbooks   | <ul style="list-style-type: none"> <li>• Create</li> <li>• Copy</li> <li>• Download</li> <li>• Edit</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Share</li> <li>• View</li> </ul> | See the Worksheets documentation.            |
| Slides presentations   | <ul style="list-style-type: none"> <li>• Create</li> <li>• Copy</li> <li>• Download</li> <li>• Edit</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Share</li> <li>• View</li> </ul> | See the Slides documentation.                |
| Discovery boards       | <ul style="list-style-type: none"> <li>• Create</li> <li>• Copy</li> <li>• Edit</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Share</li> <li>• View</li> </ul>                     | See the Discovery Boards documentation.      |
| Notification templates | <ul style="list-style-type: none"> <li>• Create</li> <li>• Copy</li> <li>• Edit</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Share</li> <li>• View</li> </ul>                     | See the Notification Designer documentation. |
| Workday Docs templates | <ul style="list-style-type: none"> <li>• Create</li> <li>• Copy</li> <li>• Edit</li> <li>• Remove (to Trash)</li> <li>• Rename</li> </ul>                                                      | See the Workday Docs documentation.          |

| File Type                           | Actions                                                                                                                                                                                                           | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     | <ul style="list-style-type: none"> <li>• Share</li> <li>• View</li> </ul>                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Video/media files                   | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Edit</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Share</li> <li>• Upload</li> <li>• View</li> </ul>                    | <p>To rename a video file:</p> <ol style="list-style-type: none"> <li>1. Double-click the file to open the <b>View Media</b> page.</li> <li>2. Click <b>Edit Media</b>.</li> <li>3. Click the pencil (Rename) icon to rename the file.</li> </ol> <p>Video files have an additional administrator setting that determines whether file owners can allow viewers and commenters to copy or download. If you don't see a download or copy action, this indicates that the administrator disabled the action.</p> <p>When you copy a media file containing closed captions, Drive copies only the video portion of the media. You need to copy the closed captions separately.</p> |
| PDF files                           | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Move</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> <li>• View</li> </ul> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Microsoft file types: DOC and DOCX  | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> <li>• View</li> </ul>                 | Drive doesn't support previewing password-protected files.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Microsoft® file types: XLS and XLSX | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Move</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> </ul>                                   | <p>When you upload this type of file, Drive uploads the original file and automatically creates a workbook from the file.</p> <p>To view these files, you must download them; Drive doesn't include a file viewer.</p> <p>Drive doesn't support converting an Excel file to a workbook if it requires a password to open.</p>                                                                                                                                                                                                                                                                                                                                                   |

| File Type                             | Actions                                                                                                                                                                                           | Notes                                                                                                                                                                                                                                                                                               |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                       | <ul style="list-style-type: none"> <li>• Upload</li> </ul>                                                                                                                                        |                                                                                                                                                                                                                                                                                                     |
| Microsoft file types: XLSM            | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> </ul>                 | To view these files, you must download them; Drive doesn't include a file viewer.                                                                                                                                                                                                                   |
| Microsoft file types: PPT and PPTX    | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> </ul>                 | To view these files, you must download them; Drive doesn't include a file viewer.                                                                                                                                                                                                                   |
| Delimited file type: CSV              | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> </ul>                 | <p>When you upload these files, Drive uploads the original file and automatically creates a workbook from the file.</p> <p>To view these files, you must download them; Drive doesn't include a file viewer.</p>                                                                                    |
| HTML file type: HTML                  | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Move</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> </ul> | <p>When you upload these files, Drive uploads the original file and automatically creates a workbook from the tables in the file. If the file doesn't contain tables, Drive doesn't create a workbook.</p> <p>To view these files, you must download them; Drive doesn't include a file viewer.</p> |
| Image file types: GIF, JPG, JPEG, PNG | <ul style="list-style-type: none"> <li>• Copy</li> <li>• Download</li> <li>• Move</li> <li>• Remove (to Trash)</li> <li>• Rename</li> <li>• Replace</li> <li>• Share</li> <li>• Upload</li> </ul> |                                                                                                                                                                                                                                                                                                     |

| File Type                                 | Actions                                                                                                                                                                           | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                           | <ul style="list-style-type: none"> <li>View</li> </ul>                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Image file types: BMP, SVG, TIF, and TIFF | <ul style="list-style-type: none"> <li>Copy</li> <li>Download</li> <li>Move</li> <li>Remove (to Trash)</li> <li>Rename</li> <li>Replace</li> <li>Share</li> <li>Upload</li> </ul> | To view these files, you must download them; Drive doesn't include a file viewer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| ZIP files (SCORM/AICC files only)         | <ul style="list-style-type: none"> <li>Copy</li> <li>Download</li> <li>Move</li> <li>Remove (to Trash)</li> <li>Rename</li> <li>Share</li> <li>Upload</li> </ul>                  | <p>You can upload SCORM or AICC packaged content in ZIP files. (Workday Learning uses these files.) If the ZIP file isn't a Learning package (a valid SCORM or AICC package), the upload fails.</p> <p>You can upload packaged content (ZIP) files only if Workday Media Cloud is enabled on the system.</p> <p>Packaged content files have an additional administrator setting that determines whether file owners can allow viewers and commenters to copy or download. If you don't see a download or copy action, this indicates that the administrator disabled the action.</p> |

## Reference: File Actions in Drive Based on Permissions

This table summarizes the primary actions that you can do with files in Drive on a web browser, based on the user's permission level. You specify permission levels when you share a file.

| Action                      | Can View | Can Comment | Can Edit | Owner | Notes                                                                                                                                                                                                                               |
|-----------------------------|----------|-------------|----------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View file                   | X        | X           | X        | X     |                                                                                                                                                                                                                                     |
| View file information       | X        | X           | X        | X     |                                                                                                                                                                                                                                     |
| Search for a file or folder | X        | X           | X        | X     | Start typing the word or phrase that you want to find. You need to type at least 2 characters. Drive searches all folders that you have access to. Files that someone shared with you using a link don't display in search results. |
| Copy file                   | X        | X           | X        | X     | You can select a destination for the copied file. If you don't:                                                                                                                                                                     |

| Action                                                                                                                                                | Can View | Can Comment | Can Edit | Owner | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------|----------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                       |          |             |          |       | <ul style="list-style-type: none"> <li>If the file is in a shared folder, the copy displays in the same location as the original.</li> <li>If you're copying an individual file that's not in a shared folder, the copy displays in your Drive home view.</li> </ul> <p>Applies for the Can View and Can Comment permission only if the file owner enabled the Copy option when sharing the file.</p> <p>Not applicable to discovery boards.</p> |
| Download file (if enabled by administrator)                                                                                                           | X        | X           | X        | X     | <p>Applies for the Can View and Can Comment permission only if the file owner enabled the Download/Print option when sharing the file.</p> <p>Not applicable to discovery boards.</p>                                                                                                                                                                                                                                                            |
| Print Worksheets workbooks                                                                                                                            | X        | X           | X        | X     | <p>Applies for the Can View and Can Comment permission only if the file owner enabled the Download/Print option when sharing the file.</p>                                                                                                                                                                                                                                                                                                       |
| View and add comments in Worksheets workbook                                                                                                          |          | X           | X        | X     |                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| View list of users that you shared a file with                                                                                                        |          | X           | X        | X     | <p>If a user's avatar changes in Workday, a delay of up to 8 hours might occur before you see the avatar update in Drive.</p>                                                                                                                                                                                                                                                                                                                    |
| Remove yourself from shared file access                                                                                                               | X        | X           | X        |       |                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Add file to folder                                                                                                                                    |          |             | X        | X     | <p>Applies if you have Edit permission for the folder.</p>                                                                                                                                                                                                                                                                                                                                                                                       |
| Share file with specific individuals<br>Share file with groups (if enabled by administrator)<br>Share file using a link (if enabled by administrator) |          |             | X        | X     | <p>Applies for the Can Edit permission only if the file owner enabled the Share option when sharing the file.</p>                                                                                                                                                                                                                                                                                                                                |

| Action                                        | Can View | Can Comment | Can Edit | Owner | Notes                                                                                                                                                            |
|-----------------------------------------------|----------|-------------|----------|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Change share permissions                      |          |             | X        | X     | Applies for the Can Edit permission only if the file owner enabled the Share option when sharing the file.                                                       |
| Edit file content                             |          |             | X        | X     |                                                                                                                                                                  |
| Rename file                                   |          |             | X        | X     |                                                                                                                                                                  |
| Move file                                     |          |             | X        | X     |                                                                                                                                                                  |
| Replace file                                  |          |             | X        | X     |                                                                                                                                                                  |
| Transfer ownership of individual items        |          |             |          | X     | You must share the item first, before you can transfer ownership to that person.<br><br>Some products that integrate with Drive don't allow ownership transfers. |
| Change owner settings for sharing and copying |          |             |          | X     |                                                                                                                                                                  |
| Move to trash and restore from trash          |          |             |          | X     |                                                                                                                                                                  |

## Reference: Folder Actions in Drive Based on Permissions

This table summarizes the actions available for folders based on the user permission level.

You specify permission levels when you share a folder.

| Action                                  | Can View | Can Comment | Can Edit | Owner | Notes                                                                                                                                                                                                                                                              |
|-----------------------------------------|----------|-------------|----------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View folder content                     | X        | X           | X        | X     |                                                                                                                                                                                                                                                                    |
| View folder information                 | X        | X           | X        | X     |                                                                                                                                                                                                                                                                    |
| Comment on workbooks in a shared folder |          | X           | X        | X     | To change a user's permission setting for a file, update the setting in the individual file.                                                                                                                                                                       |
| Copy shared file in shared folder       | X        | X           | X        | X     | If the file is in a shared folder, by default the copy displays in the same location in the folder hierarchy as the file you're copying. If you're sharing an individual file that's not in a shared folder, by default the copy displays in your Drive Home view. |

| Action                                                                                               | Can View | Can Comment | Can Edit | Owner | Notes                                                                                                                                                                                                                                                                         |
|------------------------------------------------------------------------------------------------------|----------|-------------|----------|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View list of users that you shared the folder with                                                   | X        | X           | X        | X     |                                                                                                                                                                                                                                                                               |
| Remove (self) from shared folder access                                                              | X        | X           | X        |       | You can remove your access only at the level where someone gave it to you - the root access - not at an inherited access level.                                                                                                                                               |
| Create subfolder in a shared folder                                                                  |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Create or upload files in a shared folder                                                            |          |             | X        | X     | Shares all added items with all users who have view or edit permission for the folder.                                                                                                                                                                                        |
| Share folder with specific individuals<br><br>Share folder with groups (if enabled by administrator) |          |             | X        | X     | Link sharing isn't available for folders.                                                                                                                                                                                                                                     |
| Unshare with contributors                                                                            |          |             | X        | X     | If the file that you unshare is in a folder, after you unshare the file it regains any access permissions that it inherits from the folder.                                                                                                                                   |
| Change a contributor's permission setting                                                            |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Share subfolder in a shared folder                                                                   |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Reshare folder                                                                                       |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Give folder access to users or groups                                                                |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Change permission level of contributors                                                              |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Unshare with a user or group                                                                         |          |             | X        | X     | Removes all access and permission.                                                                                                                                                                                                                                            |
| Rename folder                                                                                        |          |             | X        | X     |                                                                                                                                                                                                                                                                               |
| Move file or folder to a different folder                                                            |          |             | X        | X     | <p>The ability to do this action depends on:</p> <ul style="list-style-type: none"> <li>• The user's permission at the original location.</li> <li>• The user's permission at the destination.</li> <li>• The location in the hierarchy of the item you're moving.</li> </ul> |

| Action                                                                     | Can View | Can Comment | Can Edit | Owner | Notes                                                                                                                                            |
|----------------------------------------------------------------------------|----------|-------------|----------|-------|--------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                            |          |             |          |       | The item inherits the destination folder permissions by appending them to the existing permissions.                                              |
| Rename folder                                                              |          |             | X        | X     |                                                                                                                                                  |
| Transfer ownership of individual folder                                    |          |             |          | X     | Share the folder first, then you can transfer ownership to that person. Some products that integrate with Drive don't allow ownership transfers. |
| Transfer ownership of up to 1,000 items, which can be contained in folders |          |             |          |       | Administrator only                                                                                                                               |
| Change owner setting for advanced sharing options                          |          |             |          | X     |                                                                                                                                                  |
| Change owner setting for editor sharing                                    |          |             |          | X     | Owners can change this setting for shared files that aren't in shared folders.                                                                   |
| Remove folder to the trash                                                 |          |             |          | X     | Removing a folder removes any sharing permissions.                                                                                               |
| Restore folder or file from the trash                                      |          |             |          | X     | Restoring a folder doesn't restore sharing settings.                                                                                             |
| Upload folders (not supported)                                             |          |             |          |       | Drive doesn't support uploading folders or folder hierarchies, such as from Cyberduck.                                                           |

## Reference: Mobile Features and Usability Notes for Drive

You can access Drive from the **Drive** worklet on the Workday mobile app.

This table summarizes differences in functionality between the Drive web application and the mobile applications.

| Action     | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View files | <p>iOS:</p> <ul style="list-style-type: none"> <li>You can view these file types in the Drive app: PDF, DOC, DOCX, JPEG, JPEG2000, TIFF, PICT, GIF, PNG, BMP, ICO, QuickTime®, Apple® ICNS, video files, and packaged content.</li> <li>You need a third-party app to view these file types: XLS and XLSX.</li> </ul> <p>Android:</p> <ul style="list-style-type: none"> <li>You can view these file types in the Drive app: PDF, JPG, JPEG, PNG, GIF, TIFF, BMP, and video files.</li> </ul> |

| Action              | Notes                                                                                                                          |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------|
|                     | <ul style="list-style-type: none"><li>You need a third-party app to view these file types: DOC, DOCX, XLS, and XLSX.</li></ul> |
| Convert to workbook | From the Actions menu to the right of the filename, go to the Action sheet to convert a file to a workbook.                    |