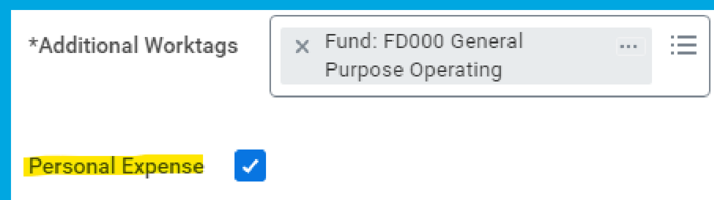
2021 TIP SHEET

Featuring all 2021 Workday Tips of the Month in One Handy Sheet!

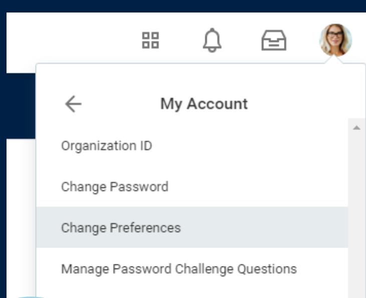
How to: Reconcile a Personal Expense from UBC Card

If you've accidentally used your UBC Card for a personal expense, here's how to reconcile it.

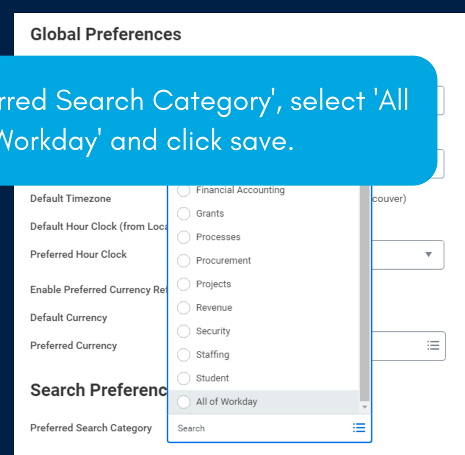


Within the Expense Report, select the 'Personal Expense' box. The amount of the expense will then be deducted from your pay.

How to: Update your Search Preferences to Default to 'All of Workday'



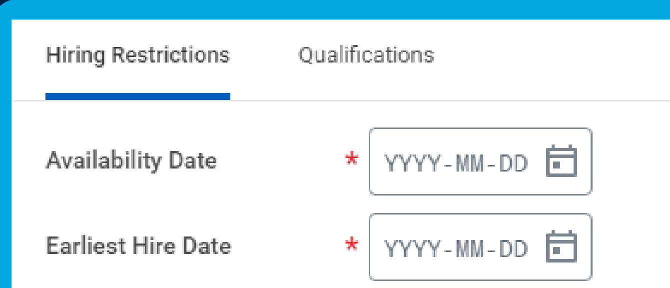
1 Navigate to 'Change Preferences' under 'My Account' at the top right of your Workday screen



2 Under 'Preferred Search Category', select 'All of Workday' and click save.

How to: Select the Earliest Hire and Availability Dates When Creating a Position

When creating a position in Workday, be sure to select today's date for the '**Earliest Hire**' and '**Availability**' dates to ensure you can hire into the position right away. If you enter a later date, you will not be able to action the position until that date.

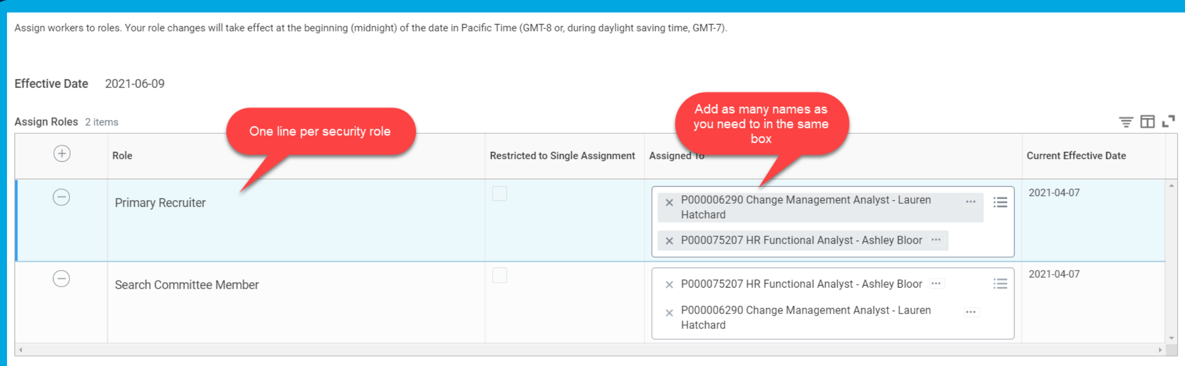


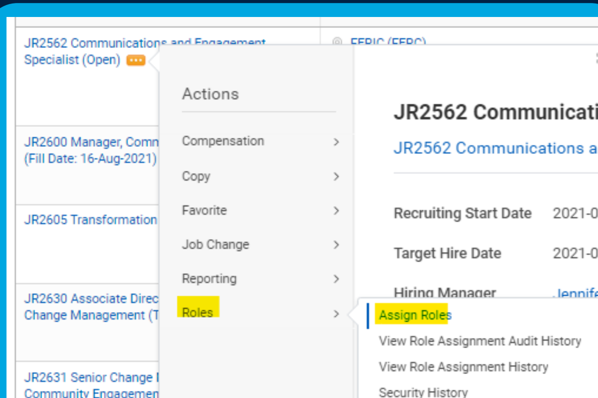
How to: Understand Different Transaction Statuses on Your UBC Visa Card Transactions

Transaction Status	Expense Report	Bank Settlement	Next Step for Cardholder
New	Not Submitted	Incomplete	Submit Expense Report
Prepaid	Not Submitted	Complete	Submit Expense Report
Pending	Draft or In Progress	Any	Follow-up with approver or re-submit returned expense report
Expensed	Approved	Incomplete	None
Paid	Approved	Complete	None

How to: Add Others to Your Job Requisition

You can add as many Primary Recruiters and Search Committee Members to your Job Requisitions as you wish! The trick is to have one line per security role (e.g. Primary Recruiter) and add all applicable names into the same box, asshown in the image below.



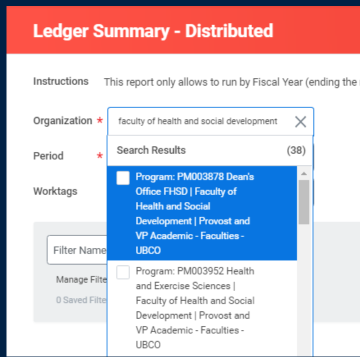


1. Search 'My Open Job Requisitions' in Workday

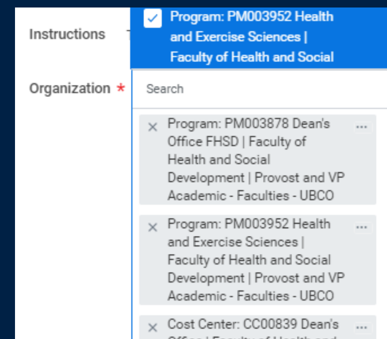
2. Hover over the Job Req and click 'Assign Roles' under the 'Roles' tab

3. There should be one line per security role. You can add names to each line depending on the security role you'd like to assign.

How to: Easily 'Select All' When Running a Report



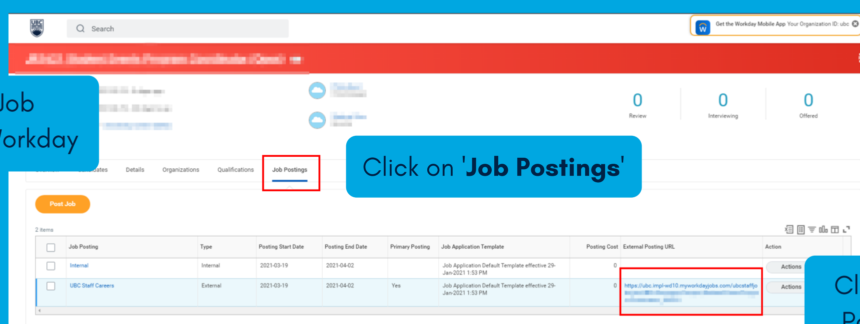
2 Hit CTRL+A and Enter. This will select all organizations within your parameters. You can then filter out any irrelevant organizations within the report once it has been run.



1 Enter search parameters into the applicable field. In this example, 'Faculty of Health and Social Development' has been entered under the 'Organization' field.

How to: View your Job Postings as an External Applicant

Go to your Job Requisition in Workday

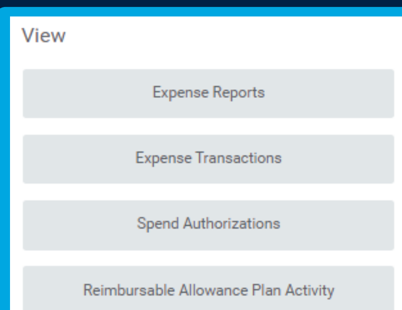


Click on '**Job Postings**'

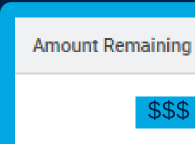
Click on the External Posting Link to view

How to: View your PD Funds

Click on the Expenses application



Click 'Reimbursable Allowance Plan Activity'



View your amount remaining for the funding year

How to: Understand your Vacation Balance

These are the hours you did not use in the previous year that have carried over into the current year's balance. If you used all your vacation time in the previous year, this column will be 0.

These are the vacation hours you've taken for the current year.

This is your total vacation balance minus the hours you've already taken.

Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Ending Period Balance	Ending Period Balance Including Pending Events
70	175	24.5	220.5	220.5

More information on vacation balances in Workday **can be found here**. If your vacation balance is incorrect and requires an adjustment, please contact your Manager and follow the **steps listed here**.

These hours are your annual allotment based on your employment agreement. If you are a term employee, these hours will be prorated based on your term end date.

This is your total vacation balance minus the vacation hours you've already taken and any pending vacation requests.