

# IRP - IN THE KNOW

UBCO's newsletter for the latest updates on Workday HR, Finance, and Student



## WORKDAY TIP OF THE MONTH



### How to: Refine Search Parameters in Workday

If you're looking for a specific type of worktag, such as a Program or Cost Center, try this tip!

1

Type the worktag, such as 'cost center', followed by ':'. Then type your search parameters. In this example, we've used 'ubco engineering'.

2

Student

Tasks and Reports

All of Workday

Ensure 'All of Workday' is selected.

3

Search Results 2 items

All of Workday

CC00870 Academic Programs | School of Engineering | Provost and VP Academic - Faculties - UBCO Cost Center

CC00877 Fee For Service | School of Engineering | Provost and VP Academic - Faculties - UBCO Cost Center

Select the worktag you'd like to view.

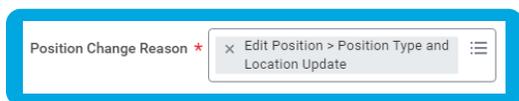


## FEATURE KNOWLEDGE BASE ARTICLE

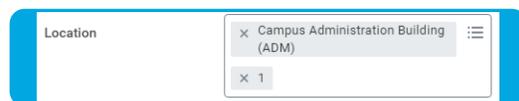
How to Change My Tax Elections  
[Find article here](#)

# HOW TO UPDATE THE LOCATION AND/OR FUNCTIONAL UNIT HIERARCHY FOR A POSITION/EMPLOYEE

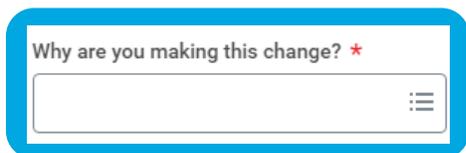
HR Analysts have the ability in Workday to make these changes for positions and employees within the Sup Orgs to which they have access. To make location changes to a position, use the **'Edit Position Restrictions'** business process and select 'Position Type and Location Update' as the Position Change Reason.



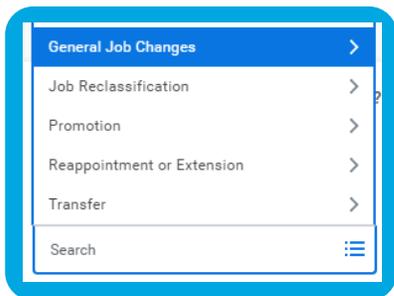
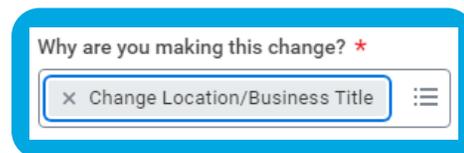
**For Location change on a position**



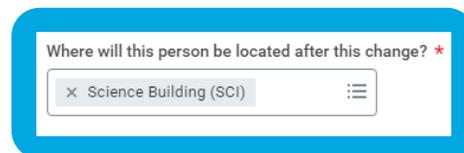
To make these changes for the employee, use the **'Change Job'** business process. Using this business process makes changes to the employee's record and their job directly.



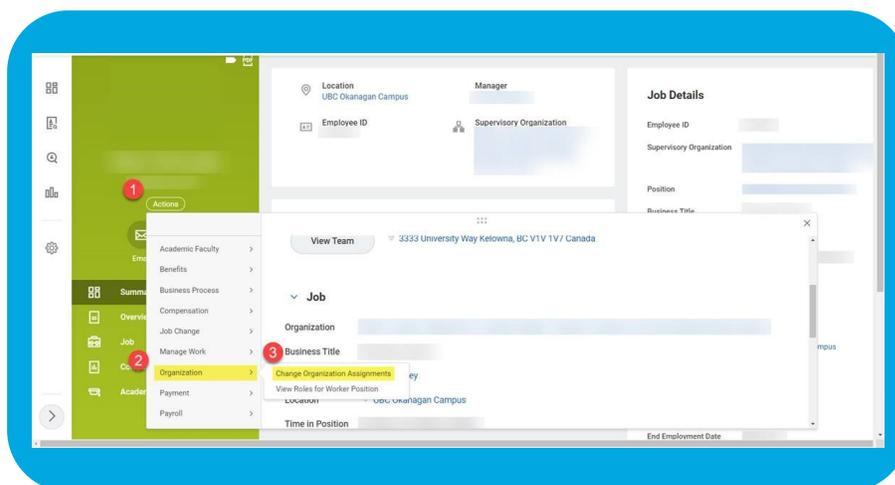
**For Location change for an employee**



***Important note: When selecting the new location, the Scheduled Weekly Hours and Default Weekly Hours will reset to the default of 40 hours for both fields. Please ensure these are re-entered to correctly reflect the employee's FTE.***



To make changes to the Functional Unit Hierarchy, navigate to the employee's profile in Workday, select 'Actions', click 'Organizations', and select **'Change Organization Assignments'**. After selecting the effective date, the Administrator will be directed to the 'Organization' page where the Functional Unit Hierarchy field can be updated. Once submitted, the changes will be routed to the employee's manager and the Finance HCM Partner for approval.



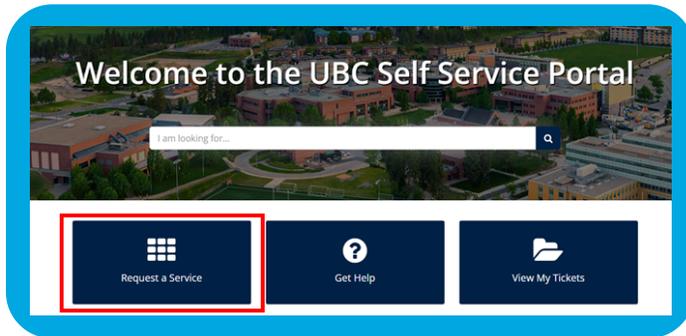
When changing the location of a position in the M&P, Excluded M&P, SUDS and Exec Admin employee groups, you will be asked to upload a Job Description checklist. This is because, when approving the changes, the Compensation Partner needs to review whether the change is due to a reclassification or a simple location change. You can add a comment indicating it's a location change which will notify the Compensation Partner it doesn't require review and will in turn result in your change receiving approval much more quickly.

# NEW PROCESS TO CONTACT UBCO PAYROLL

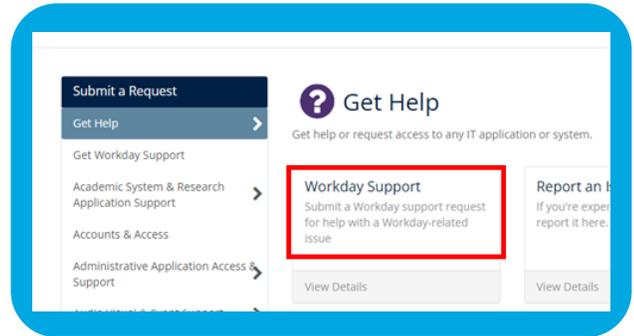
The Payroll team is continuing to evaluate the best approach to serve UBC employees. As a result, Payroll Operations is requesting that all payroll inquiries now be submitted via the [UBC Self-Service Portal](#). To ensure your inquiry is routed to the Okanagan Payroll team, please complete the following steps when submitting your request:

Select '**UBC - Okanagan**' in the 'Campus' field  
Select '**Payroll**' from the category drop-down list

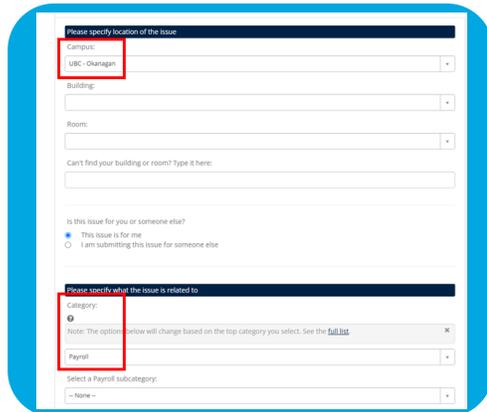
The Okanagan Payroll team will address requests in order of priority, which will assist Payroll Operations in identifying issues impacting processes, as well as opportunities for long-term solutions. If you have any questions regarding this new process, please contact [Scott.Jolley@ubc.ca](mailto:Scott.Jolley@ubc.ca).



**1** From the [UBC Self-Service Portal homepage](#), click 'Request a Service'.



**2** Click 'Workday Support'.



**3** When filling out the information within your request, ensure the campus is 'UBC - Okanagan' and select 'Payroll' from the category dropdown list.

## JANUARY ENGAGEMENTS



**Workday Wednesday: Understanding 'Match Exceptions'**

Wednesday, January 19th | 11:00am - 12:00pm

[Register here](#)

**Workday Wednesday: HR and Finance Q+A**

Wednesday, January 26th | 11:00am - 12:00pm

[Register here](#)

Our January 12th Workday Recruitment session recording and slides [can be found here](#).

## REMINDER WHEN HIRING

The **Hire** business process is where end dates come into play. Positions do not have end dates.



## Contact the ISC

To speak directly to a service representative, or if the query is urgent, the ISC can be reached at **(250) 807-8163**. **Submit a ticket here**.

**Hours of operation:** *Monday - Friday 8:00 a.m. - 5:00 p.m.*

*Need help with a ticket? Contact **[Lauren.Hatchard@ubc.ca](mailto:Lauren.Hatchard@ubc.ca)**.*



*Previous editions of IRP In the Know can be found at the **[UBCO Workday Resources webpage](#)**.*