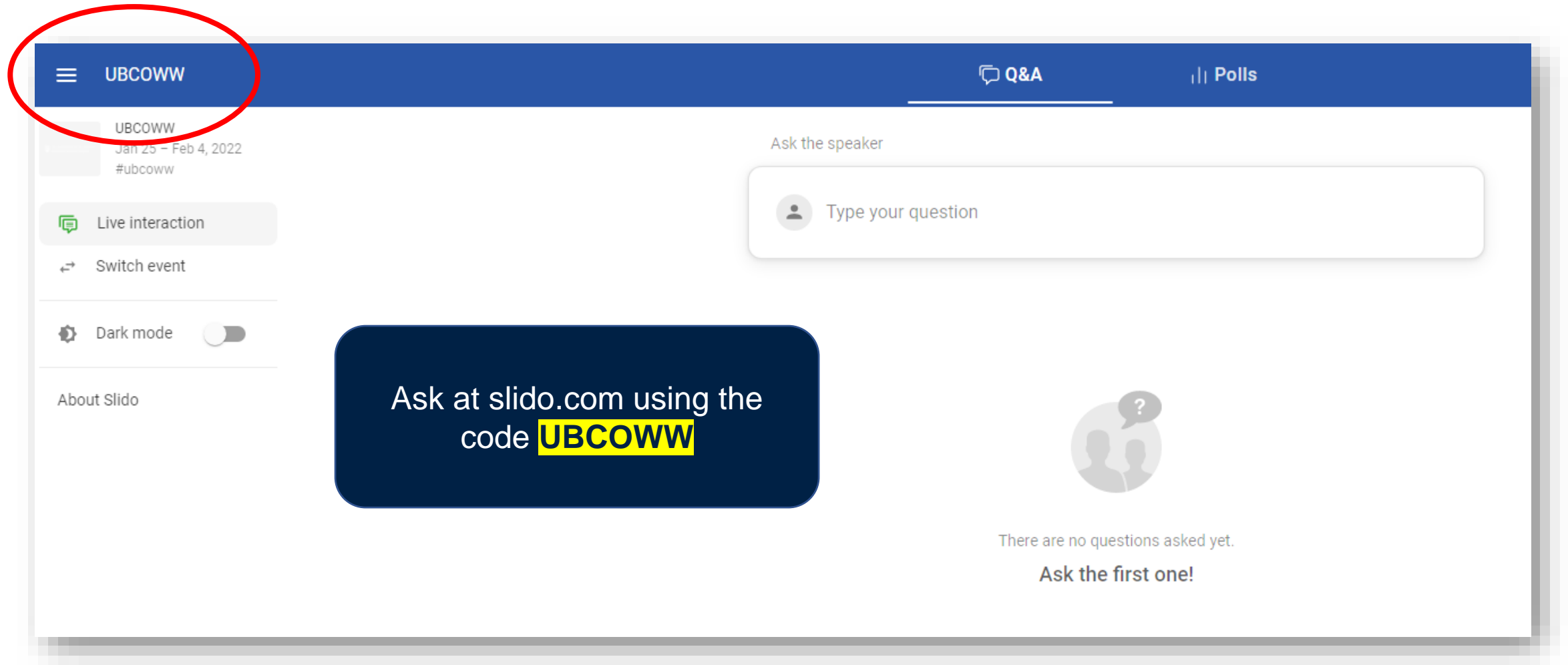


QUESTIONS?



The screenshot shows the Slido Q&A interface for an event named "UBCOWW". The event dates are "Jan 25 - Feb 4, 2022" and the hashtag is "#ubcoww". The interface includes a sidebar with options for "Live interaction", "Switch event", and "Dark mode" (which is currently turned off). The main area features a "Q&A" tab and a "Polls" tab. A central text box prompts users to "Ask the speaker" and provides a text input field labeled "Type your question". Below this, a dark blue box contains the text "Ask at slido.com using the code **UBCOWW**". At the bottom, a message states "There are no questions asked yet. Ask the first one!" accompanied by an icon of two people with a question mark.

UBCOWW

Jan 25 - Feb 4, 2022

#ubcoww

Live interaction

Switch event

Dark mode

About Slido

Ask the speaker

Type your question

Ask at slido.com using the code **UBCOWW**

There are no questions asked yet.
Ask the first one!



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations
Okanagan Campus

Workday Wednesday: Tips + Tricks

February 2nd, 2022



WORKER HISTORY BY CATEGORY

PDF

Actions

Email

Team

Summary

Overview

Job

Compensation

Educational

Click 'Worker History'

Job Details Jobs Organizations Management Chain Service Dates Employee History Worker History

Job Details

Employee ID

Supervisory Organization

Position

Business Title

Contact Info

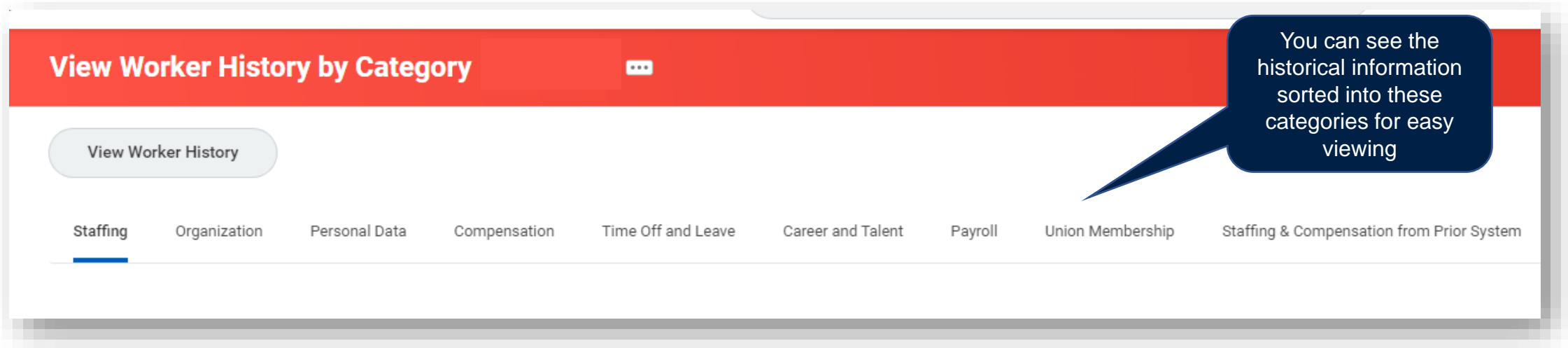
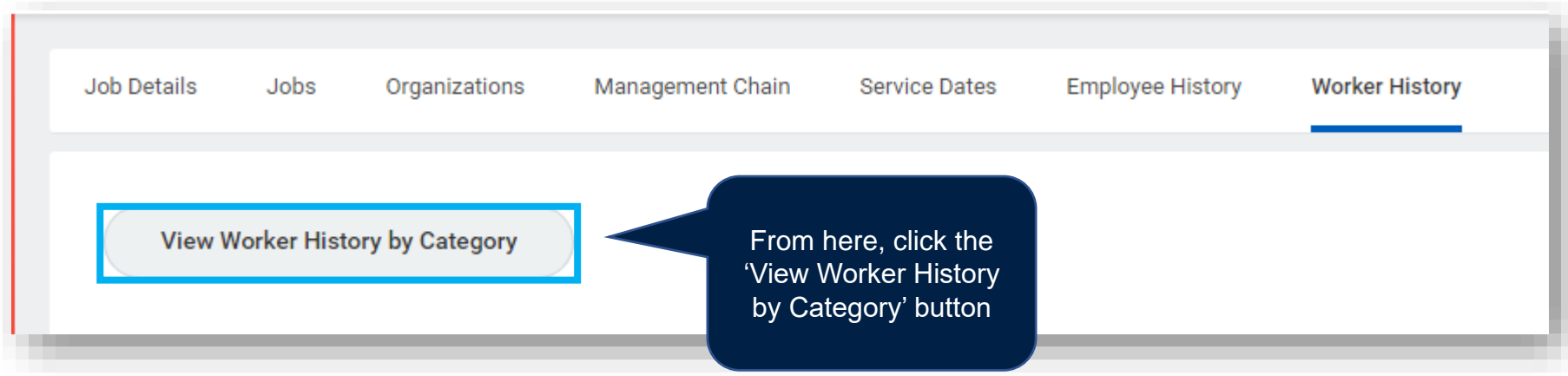
Email

Work Address

3187 Univer

From the employee profile, click on 'Overview'

WORKER HISTORY BY CATEGORY



ALL OF WORKDAY

Search Results

Categories

Common

Assets

Budgets

Drive

Endowments

Expenses

Financial Accounting

Grants

Inventory

Organizations

Payroll

People

Processes

Procurement

Projects

Recruiting

Revenue

Staffing

Student

Tasks and Reports

Time Off and Leave

All of Workday

1

Lauren Hatchard

View Profile

Home

My Account

Favorites

To change your search results to default to 'All of Workday, click 'My Account'

2

My Account

Organization ID

Change Password

Change Preferences

Click 'Change Preferences'

3

Search Preferences

Preferred Search Category

All of Workday

Account Preferences

Mobile Carrier

Preferred Home Page

Simplified View

Show responsive layout for prompts

OK

Cancel

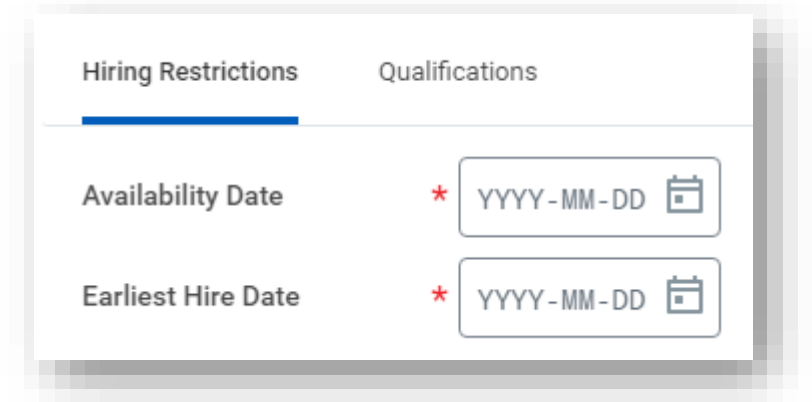
Set 'Preferred Search Category' to 'All of Workday'

Click 'OK' to save changes

When searching in Workday, click 'All of Workday' at the bottom left of the search page

EARLIEST HIRE/AVAILABILITY DATE

Has this ever happened to you...? You've created a position, completed all steps and approvals, and when you go to create the Job Requisition for said position, it's nowhere to be found!?



Hiring Restrictions	Qualifications
Availability Date *	YYYY-MM-DD
Earliest Hire Date *	YYYY-MM-DD

In most cases, this is because the 'Earliest Hire' and 'Availability' dates have been set for a date in the future. This means no action can be taken on the position, including posting it, until that date!

To make matters worse, you can't edit these dates on the position to earlier dates. The course of action in this case is unfortunately to create a whole new position! Argh!

OKAY, what can you do to make sure this doesn't happen again!?

EARLIEST HIRE/AVAILABILITY DATE

Hiring Restrictions	Qualifications
Availability Date	* Today or earlier
Earliest Hire Date	* Today or earlier

Regardless of when you'd like the incumbent to start in this role, as a rule of thumb, select today's date or an earlier date for both the Availability and Earliest Hire dates. This will avoid any roadblocks with posting the position.

CANCEL TASK

For certain inbox tasks, if it's no longer required, you can click the gear icon and select 'Cancel' to cancel this task.

Assign Costing Allocation for Change Job

5 day(s) ago - Due 2022-01-30; Effective 2022-03-01

Select worker and position. Make sure to click "Add", even if you are not changing the allocation.

Please include Total Monthly Salary or Hourly rate in the Comment box.



Cancel
Delegate Task
Skip This Task
View Details



Please note there is a difference between cancelling the task, which stops the entire BP altogether in order to start over from scratch and skipping the task, because that To Do step doesn't apply to you, but the rest of the BP should continue as is.

Be sure to click 'Submit' to fully cancel the task

Cancel Business Process Costing Allocation

5 day(s) ago - Due 2022-01-30; Effective 2022-03-01

For UBCO | Research Support | Najia

Overall Process Data Change: Zengjie Zhang

Overall Status In Progress

Due Date 2022-02-03

Details

Event Details

Costing Allocation Level Worker and Position

For Zengjie Zhang

For P000081055 Postdoctoral

Include Existing Allocations

From 2022-03-01 To (empty)

✓ **New Costing Allocations**

1 item

Submit **Cancel**

SELECTING THE CORRECT BP

Generate Document for Hire (Default Definition): Employment Agree

Generate Document for Hire (Default Definition): Employment Agree

Hire: Katherine Paulot Hire Employee Event

Hire: Katherine Paulot Hire Employee Event

ID Change: Katherine Paulot Government Identifier Event

Manage Certificates: Katherine Paulot Certification Event

There are many subsequent BPs that are triggered by one event. In this example, you can see the Hire BP for Katherine has kicked off other BPs, such as ID Change and Generate Document. If you are searching for something within the BP, be sure to select the *initial* BP. In this case, you'd select the Hire BP to see the comprehensive process.

View Event

Hire: Katherine Paulot

For P000112797 Graduate Academic Assistant

Overall Process Hire: Katherine

Overall Status Successfully C

Due Date 2022-01-28

Calendars In Use Consecutive D

Details

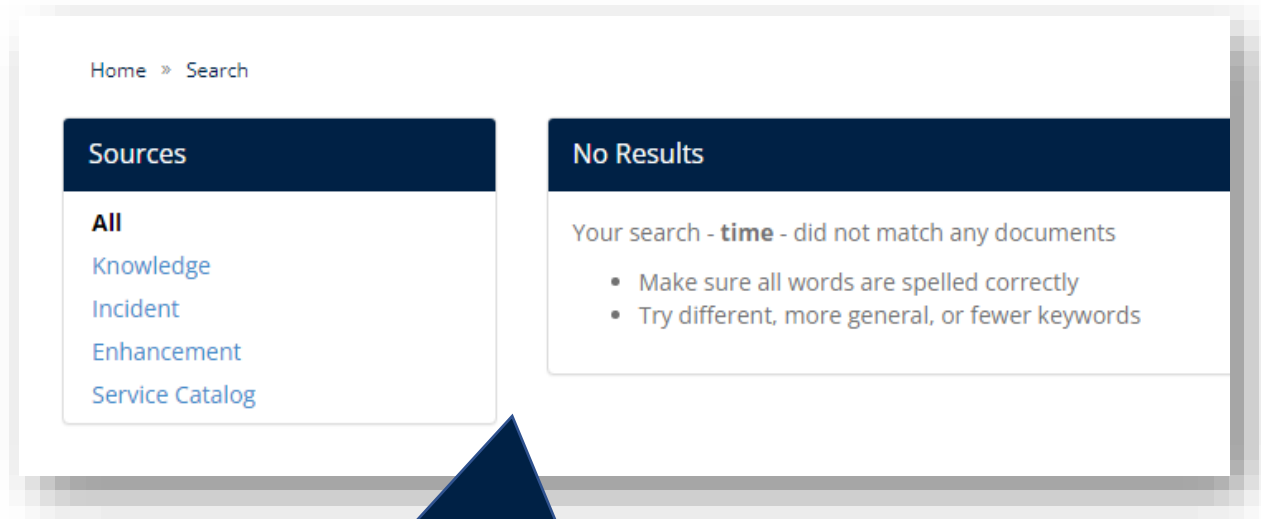
Process

You can see that after clicking the initial Hire BP and navigating to the 'Process' tab, this shows you every process related to Katherine's hire!

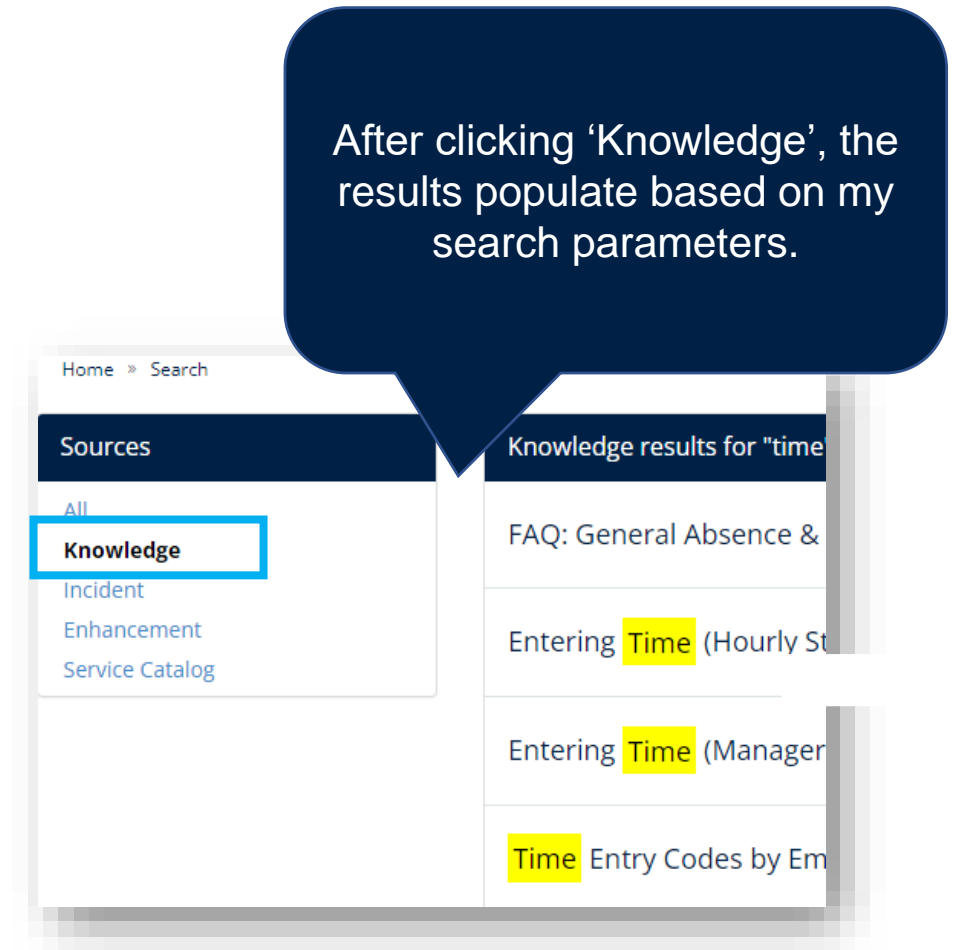
Process History 84 items

Process	Step
Hire	Hire
Hire	Review Employee Hire
Hire	Change Personal Information
Hire	Edit Government IDs
Passports and Visa Change	Passports and Visa Change
Passports and Visa Change	Approval by HR Partner (Mixed)
Passports and Visa Change	Approval by HR Analyst (Mixed)
Hire	Integration: HIRE (Default) WDPS.IAM.001 Dupe Check

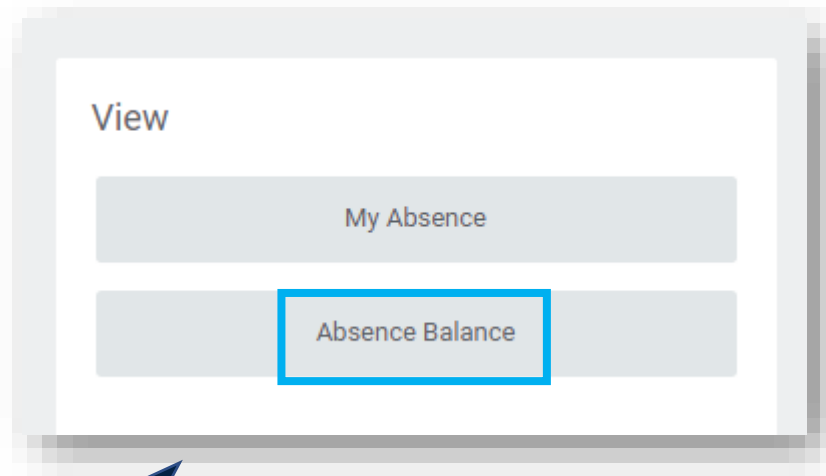
SEARCHING THE KNOWLEDGE BASE



If you search for a term in the Knowledge Base, particularly if you search on the page of another KB article, you may get this page. Obviously, there are many KB articles related to time! So, why am I getting zero results?



ABSENCE BALANCE AS OF DATE




Let's say you have vacation approved in Workday for February 14th. If you select any date before February 14th when reviewing your absence balance, it will not show your balance including the February 14th vacation. It would show your balance as of that date.

The 'As Of' date is key in seeing your balance as of a certain date. If you want to see your balance as of the end of the year, to include any and all absence requests until the end of the year, put the date as December 31, 2022.

A screenshot of the "Absence Balance" dialog box. It features a title bar "Absence Balance", a label "As Of" with a red asterisk, a date input field containing "2022-02-01" and a calendar icon, and two buttons at the bottom: "OK" (orange) and "Cancel" (gray).

ADDING OTHERS TO A JOB REQUISITION

(Open) 

Recruiting Start Date2021-11-08 - 2 months ago

Target Hire Date2022-07-01 - 5 months to go

Primary Location📍 UBC Okanagan Campus

Actions

Compensation

Copy

Favorite

Hire >

Job Change >

Reporting >

Roles >

Assign Roles

View Role Assignment Audit History

View Role Assignment History

Security History

Target Hire Date2022-07-

Hiring ManagerRuth Fro

Navigate to your Job Requisition and click the three dots

Click 'Roles', then click 'Assign Roles'

ADDING OTHERS TO A JOB REQUISITION

Effective Date 2022-02-01

Assign Roles 2 items

	Role	Assignment
	Primary Recruiter	
	Search Committee Member	<input type="checkbox"/>

There is one row for each role. You can add as many people as you'd like to each row! Simply click on the white area in the row and type the name of who you'd like to add.

Search Results

☒ P000084479 AAP

Search

P000044825 Stra

Ainley

P000055608 Seni

Wilke

P000066746 AAP

P000084479 AAP

P000009993 Assl

P000017270 Hea

P000035036 Assl

P000060329 Assl

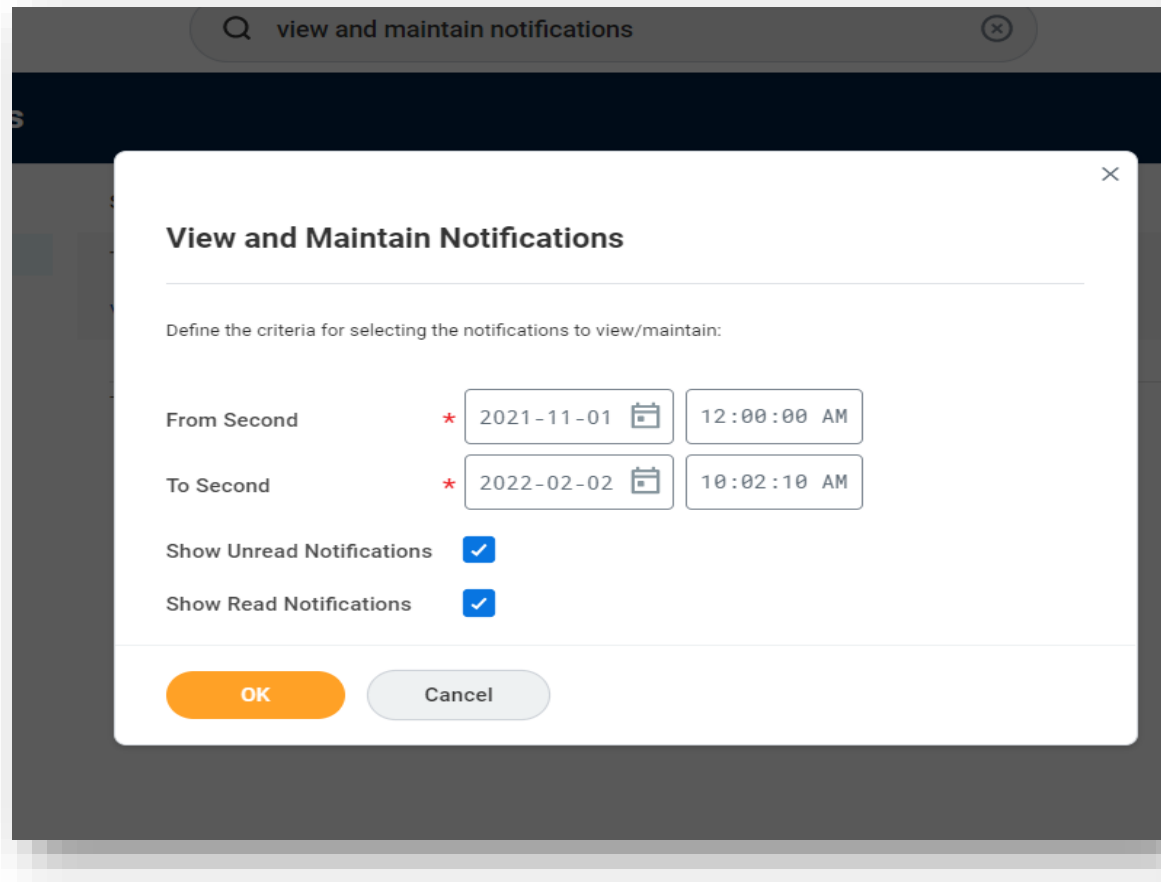
Current Roles

OK

Cancel

Then, click OK

VIEWING NOTIFICATIONS OLDER THAN 30 DAYS

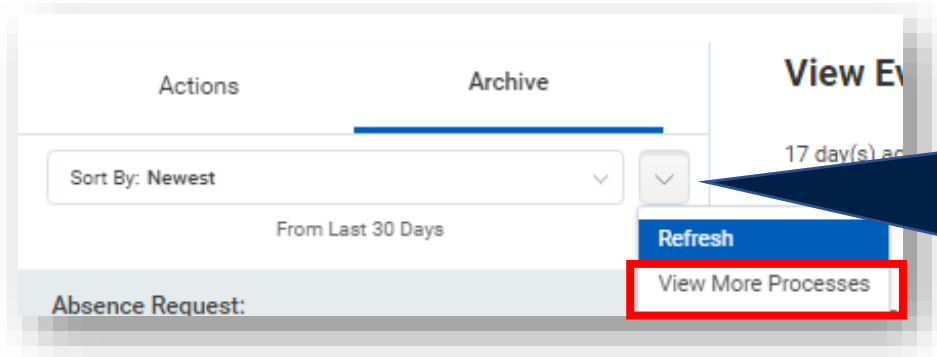


The screenshot shows a web browser window with the address bar displaying 'view and maintain notifications'. A modal dialog box titled 'View and Maintain Notifications' is open. The dialog contains the following elements:

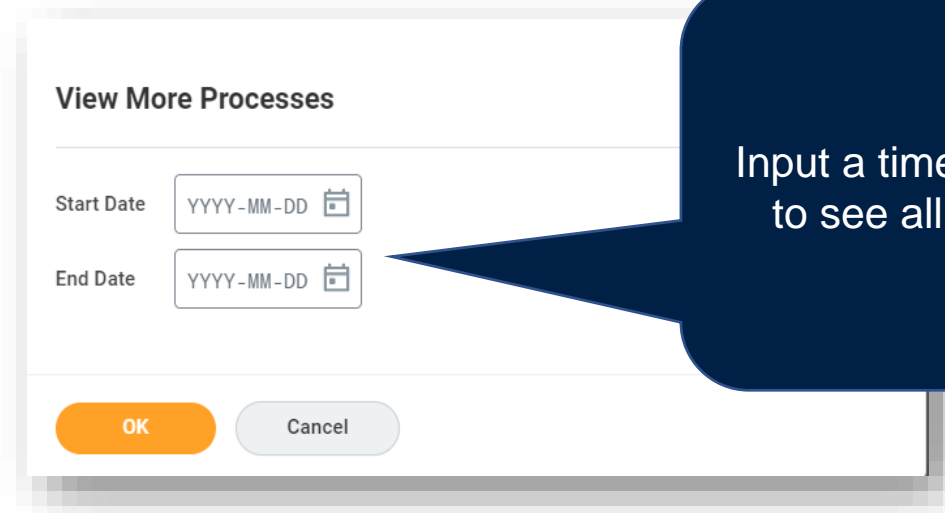
- Title:** View and Maintain Notifications
- Instruction:** Define the criteria for selecting the notifications to view/maintain:
- From Second:** A date and time selector showing '2021-11-01' and '12:00:00 AM'.
- To Second:** A date and time selector showing '2022-02-02' and '10:02:10 AM'.
- Show Unread Notifications:** A checkbox that is checked.
- Show Read Notifications:** A checkbox that is checked.
- Buttons:** An orange 'OK' button and a grey 'Cancel' button.

Search 'View and Maintain Notifications' in Workday and enter your search criteria.

VIEWING ARCHIVE ITEMS OLDER THAN 30 DAYS



From your Workday Archive, click the arrow and select 'View More Processes';



Input a time period, or leave blank to see all historical processes.

EASILY SELECT ALL

Location Hierarchy

Functional Unit Hierarchy

OK

Ca

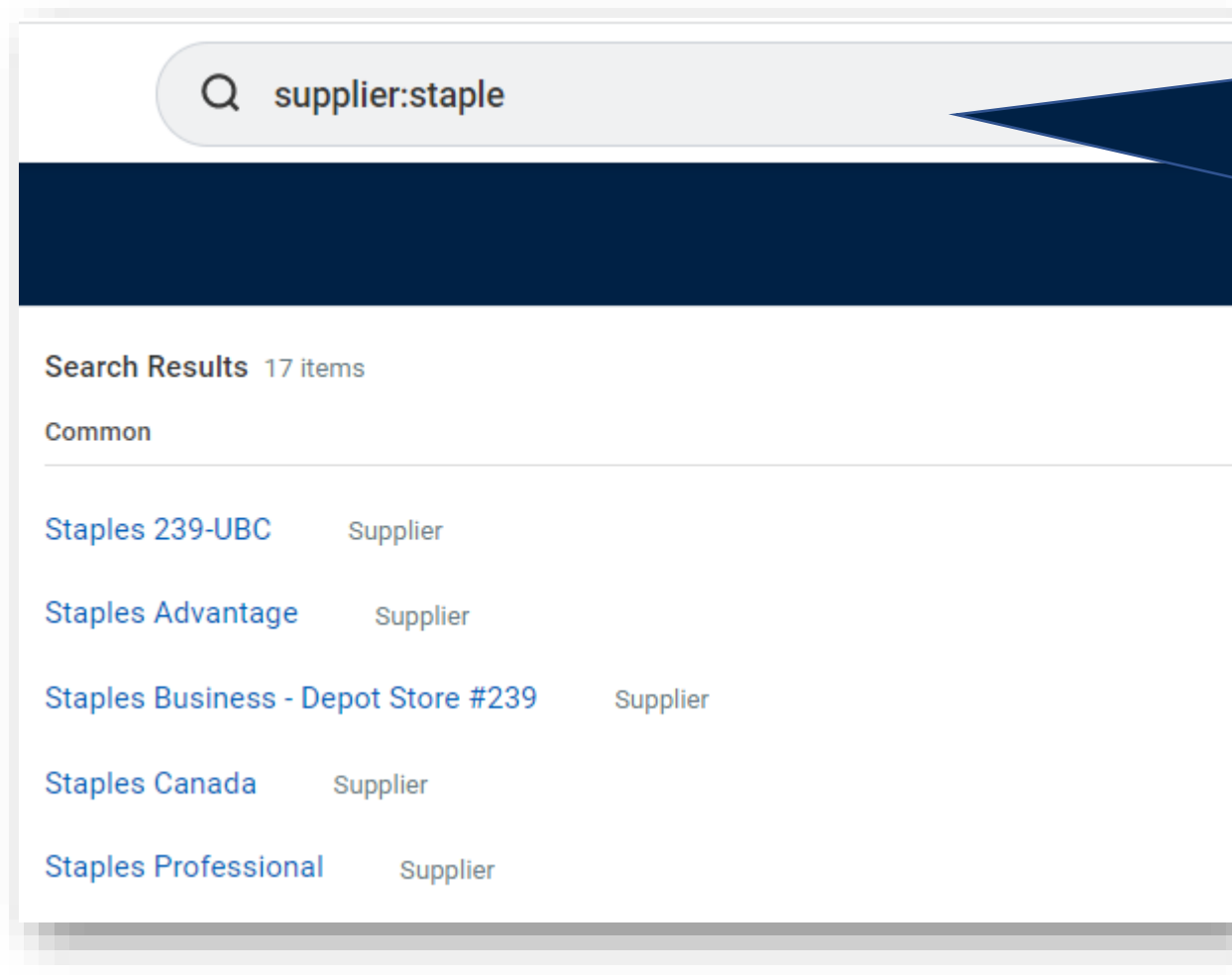
Search

← UBC Okanagan Campus

- ☒ Arts and Sciences Centre (ASC)
- ☐ Arts Building (ART)
- ☐ Campus Administration Building (ADM)
- ☐ Cascades Residence - A (CASA)
- ☐ Cascades Residence - B (CASB)
- ☐ Cascades Residence - C (CASC)
- ☐ Cascades Residence - D (CASD)
- ☐ Cascades Residence - E (CASE)

If the dropdown list has the option to select multiple, you can easily select all by pressing CTRL A + enter

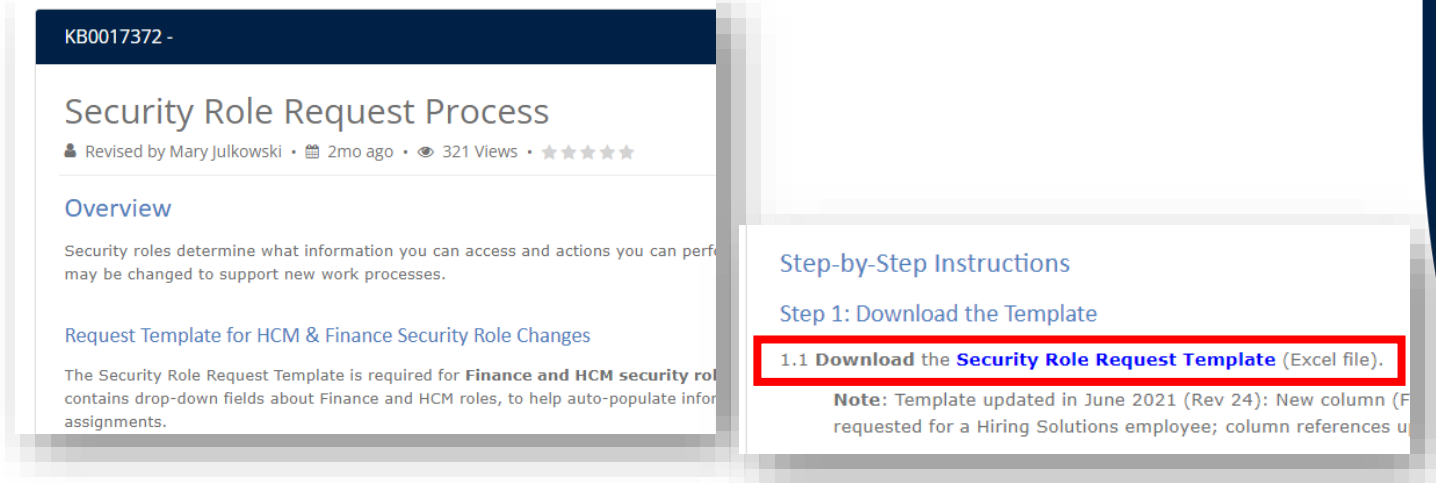
REFINE SEARCH RESULTS



For example, if you want to only see suppliers in your search results, type 'supplier', then :, then the name.

SECURITY AND POSITIONS

If you are creating a new position, don't forget to submit a request for any necessary security roles!



KB0017372 -

Security Role Request Process

Revised by Mary Julkowski • 2mo ago • 321 Views • ★★★★★

Overview

Security roles determine what information you can access and actions you can perform. Security roles may be changed to support new work processes.

Request Template for HCM & Finance Security Role Changes

The Security Role Request Template is required for **Finance and HCM security roles**. The template contains drop-down fields about Finance and HCM roles, to help auto-populate information for your request.

Step-by-Step Instructions

Step 1: Download the Template

1.1 Download the [Security Role Request Template](#) (Excel file).

Note: Template updated in June 2021 (Rev 24): New column (F) requested for a Hiring Solutions employee; column references updated.

Follow the instructions in the **Security Role Request Process** Knowledge Base article. Complete the template within the article and attach it to your request.

There is also a security role request presentation you can review at <https://finance-operations.ok.ubc.ca/workday/workday-resources/>.





Next Workday Wednesday: February 9th | 10:00 – 11:00am

Topic: Expenses

[Registration link](#)

