QUESTIONS?

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

THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations
Okanagan Campus

Workday Wednesday: Tips + Tricks

February 2nd, 2022

WORKER HISTORY BY CATEGORY

Click 'Worker History'

From the employee profile, click on 'Overview'

WORKER HISTORY BY CATEGORY

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

View Worker History by Category

From here, click the 'View Worker History by Category' button

View Worker History by Category •••

View Worker History

You can see the historical information sorted into these categories for easy viewing

| Staffing | Organization | Personal Data | Compensation | Time Off and Leave | Career and Talent | Payroll | Union Membership | Staffing & Compensation from Prior System |

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

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

Lauren Hatchard

View Profile

Home

My Account

Favorites

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

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
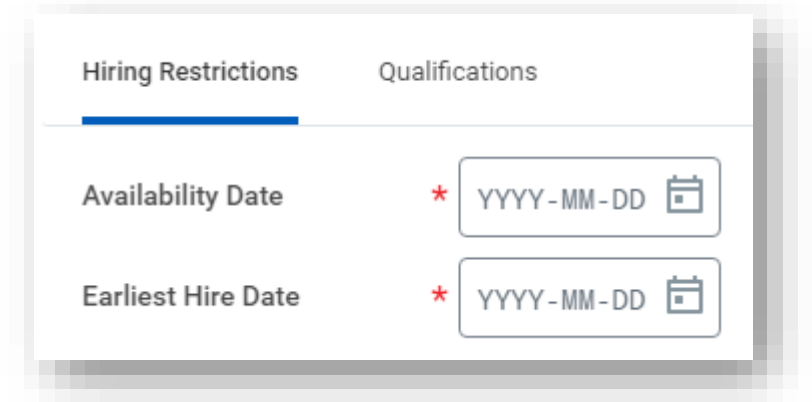
Simplified View

Show responsive layout for prompts

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

OK   Cancel

Click 'OK' to save changes

EARLIEST HIRE/AVAILABILITY DATE

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

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!?

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

Cancel Business Process   Costing A

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

For	UBCO | Research Support | Najja
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 Postdocto

Include Existing Allocations

From   2022-03-01   To   (empty)

⌄ **New Costing Allocations**

1 item

Submit   Cancel

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

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.

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 Ce... 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

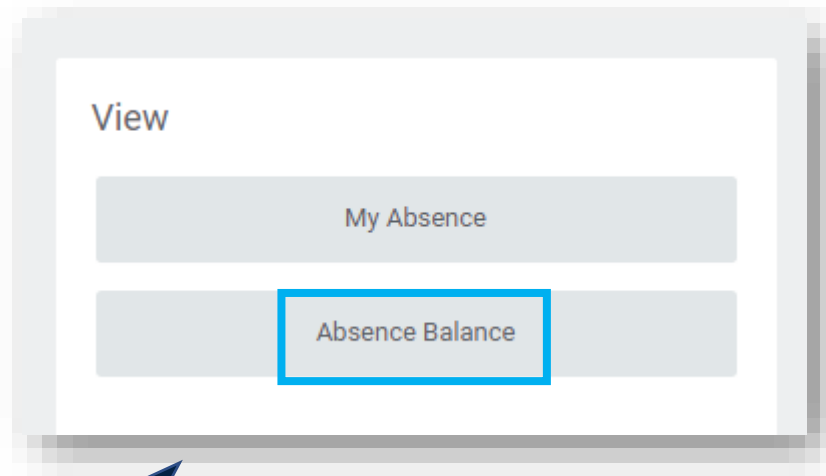| Process	Step
Hire	Hire
Hire	Review Employee Hire
Hire	Change Personal Information
Hire	Edit Government IDs
Passports and Visa Change	Passports and Visa Change
Passports and Visa Change	Approval by HR Partner (Mixed)
Passports and Visa Change	Approval by HR Analyst (Mixed)
Hire	Integration: HIRE (Default)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

SEARCHING THE KNOWLEDGE BASE
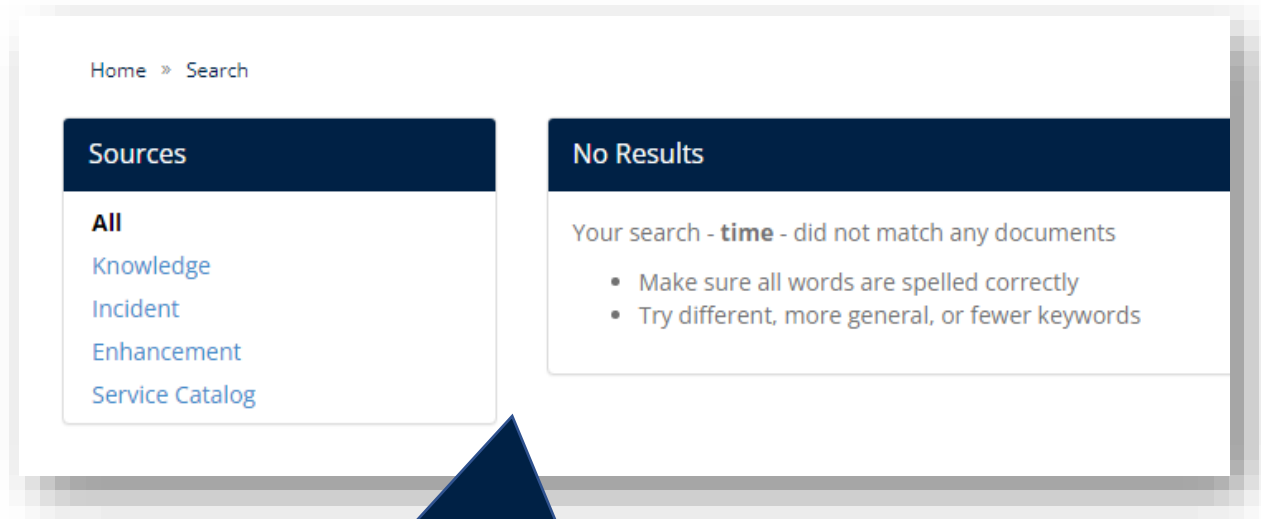
ABSENCE BALANCE AS OF DATE

Absence

View

My Absence

Absence Balance

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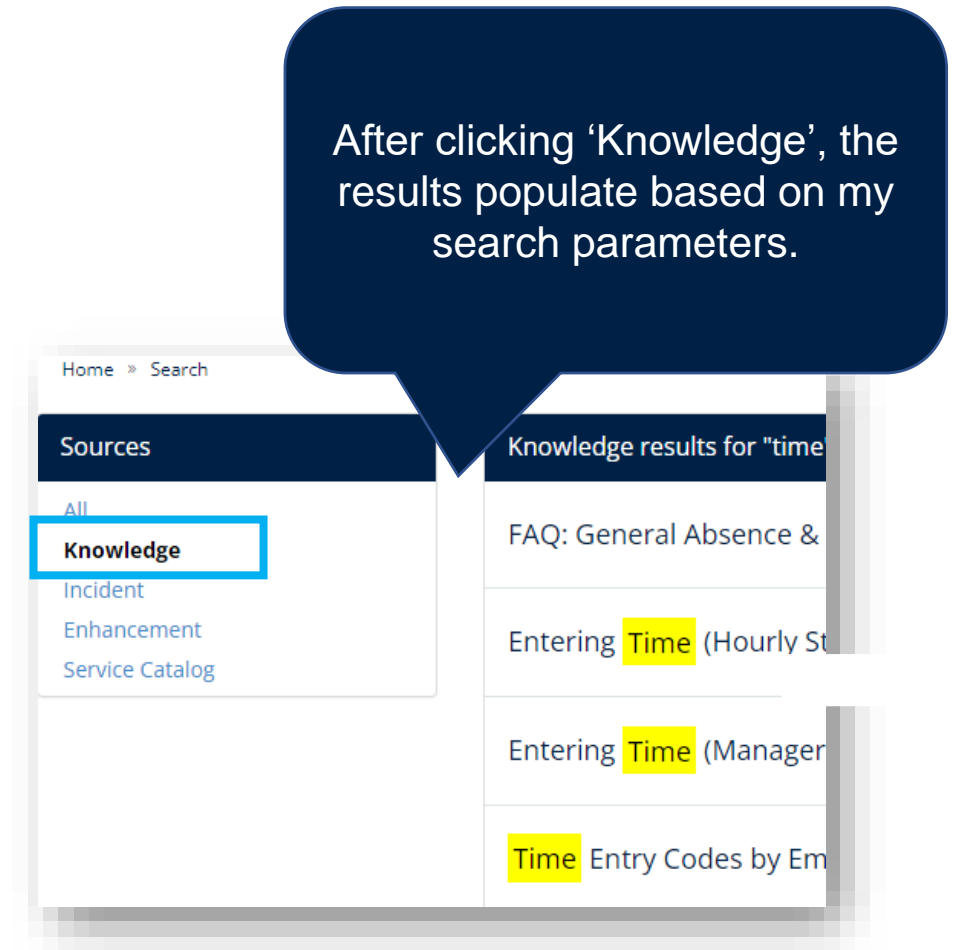
Let's say you have vacation approved in Workday for February 14th. If you select any date before February 14th when reviewing your absence balance, it will not show your balance including the February 14th vacation. It would show your balance as of that date.

Absence Balance

As Of * 2022-02-01

OK   Cancel

ADDING OTHERS TO A JOB REQUISITION

Navigate to your Job Requisition and click the three dots

Click 'Roles', then click 'Assign Roles'

ADDING OTHERS TO A JOB REQUISITION
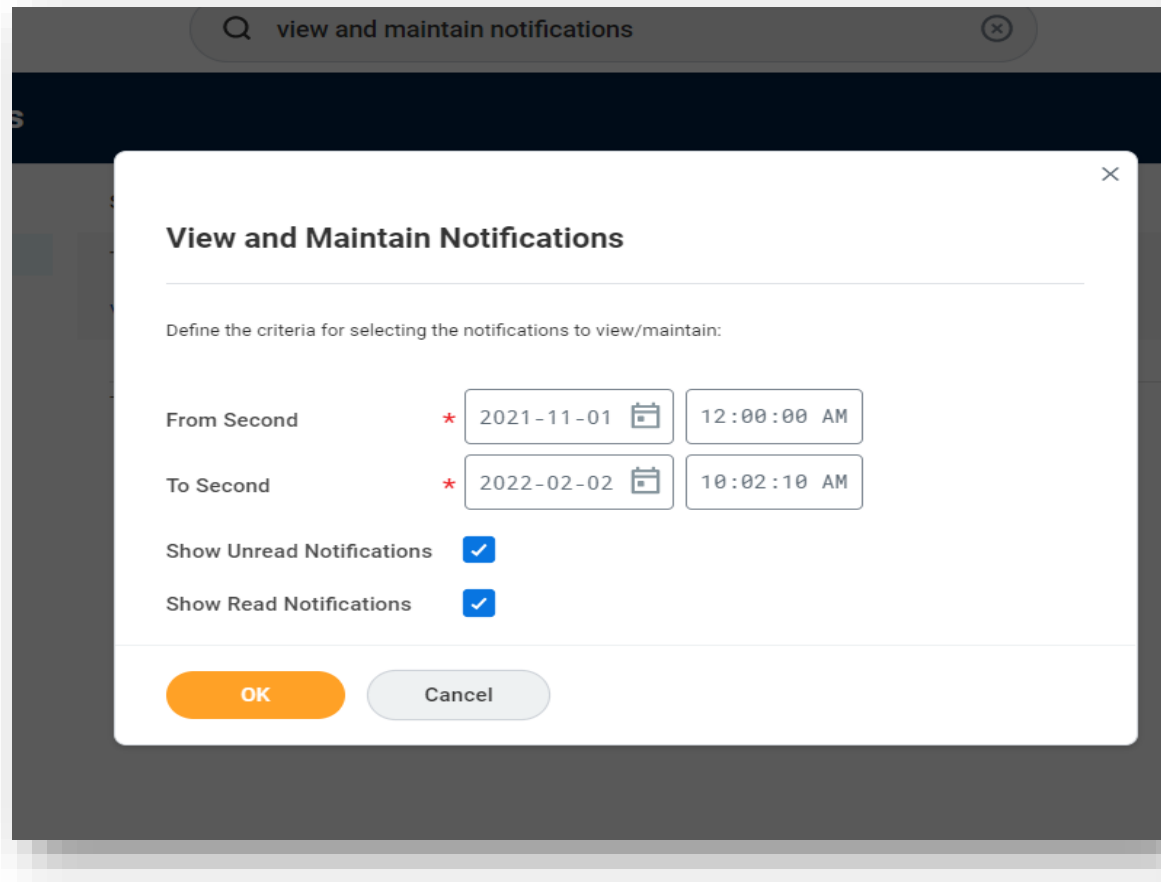
VIEWING NOTIFICATIONS OLDER THAN 30 DAYS

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

VIEWING ARCHIVE ITEMS OLDER THAN 30 DAYS
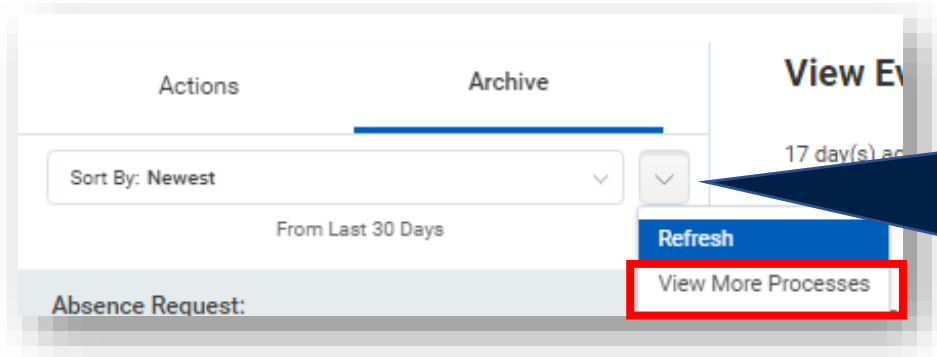
EASILY SELECT ALL

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

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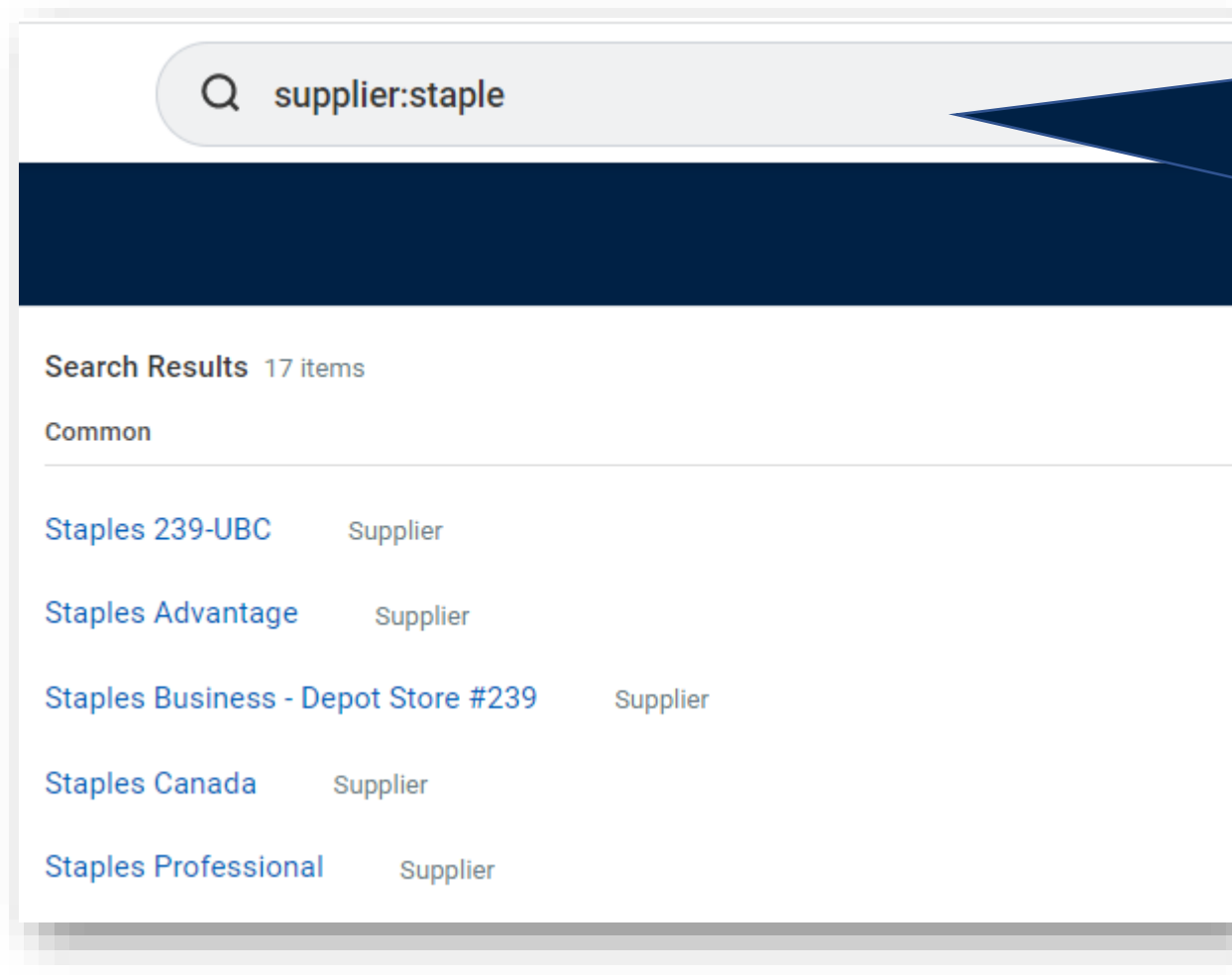
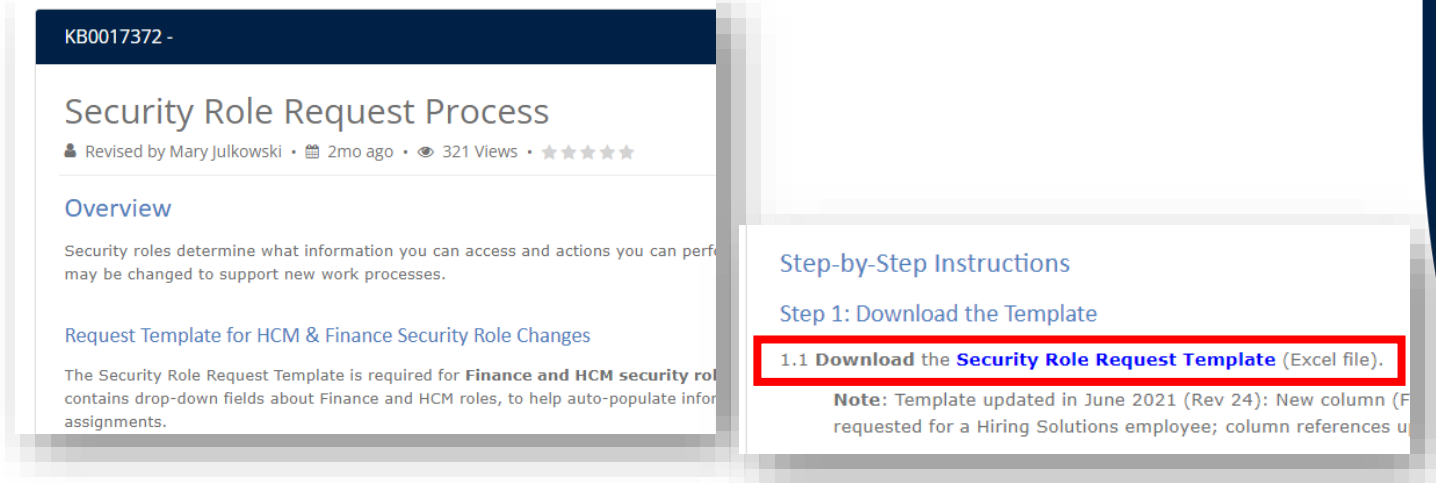For example, if you want to only see suppliers in your search results, type 'supplier', then :, then the name.

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 perf
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 rol**
contains drop-down fields about Finance and HCM roles, to help auto-populate infor
assignments.

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 u

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