

IN THE KNOW

UBCO's newsletter for the latest updates on Workday HR & Finance



Please Share/Distribute



Reminder: FDM Change Request Blackout Dates for Remaining FY2024 Quarter Ends

To allow for successful Quarter End closures for the remainder of FY2024, some FDM change request types will not be made during these blackout dates:

- Oct 6 to Oct 17 (Q2)
- Jan 5 to 15 (Q3)
- April 8 to 26 (Year-End)

For more information, visit the [UBC Finance website](#).



Workday Tips and Tricks:

- **Cancelling or deleting from your Workday Inbox:**
Most tasks that you initiate but don't or can't submit can be cancelled or deleted from your Workday Inbox. Open the task in your "My Tasks", click on the gear wheel icon, then click "Delete Incomplete" Then, click "Submit" to finalize the action.
- There are two ways to **open a second tab in Workday** while leaving the first tab unchanged:
 - a. right click on any actionable item (blue font) and choose "See in New Tab"
 - b. hover over any actionable item (blue font) and click on the roller ball on your mouse
- **Use search shortcuts.** Type a question mark ? in the search box and then press "Enter" on your keyboard. You'll see a list of search shortcuts you can use to narrow down your search results.

Get the Mobile App!

Overview

You can find Workday in the **Apple App Store** or the **Google Play App Store**.



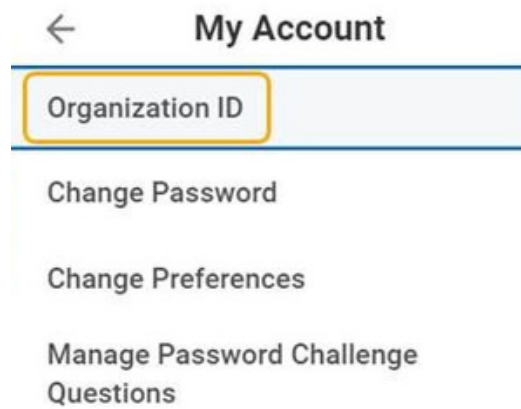
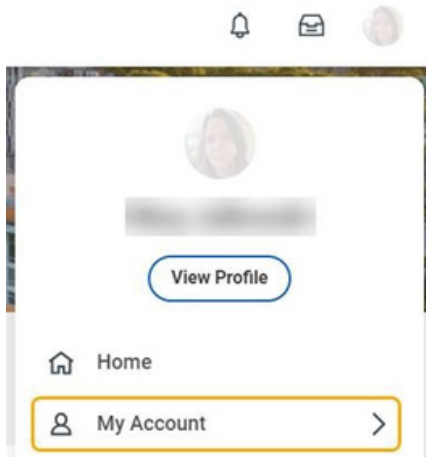
QR Code

A QR (Quick Response) Code is a type of barcode that can open a website or application on your smart phone. The simplest way to download the Workday Mobile App is using a QR Code.

1. Open Workday in a web browser on your computer and log in as you would normally.
2. Click on your Profile icon to open the Profile Menu.



3. Select **My Account > Organization ID**.



4. Open the **camera** on your smartphone, and point it at the **QR Code** to scan it. (Alternatively, scan it from the screenshot below)
5. Follow the onscreen prompts to complete the initial setup steps.

Access Workday on the go

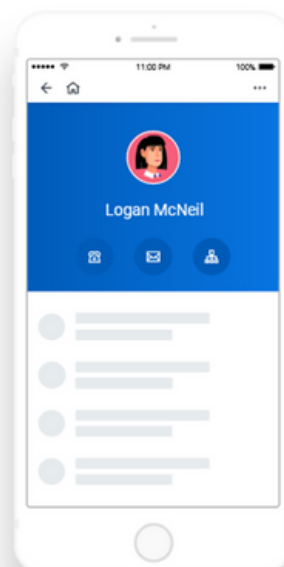
Your Organization ID: **ubc**

Get the Workday mobile app and use your Organization ID to connect.

✓ Scan



✓ Download



Changing your View/Grid Preferences



If you want to modify your grid preferences within each business process for ease of coding, you can update them by selecting the View/Edit Grid Preferences button Getting Started: Use Tools and Navigation Employee 8 Uncheck the items you do not want to see in your view. Click the items individually and drag them to change the order. Click Apply. Getting Started: Use Tools and Navigation Employee



Tax	Tax Recoverability	Tax Option	Quantity	Unit Cr
Tax Applicability <input type="text"/>			0	
Tax Code <input type="text"/>				

Column Preferences

- Order
- Company
- Item
- Item Description
- Spend Category
- Tax
- Tax Recoverability
- Tax Option
- Quantity
- Unit Cost
- Extended Amount
- Memo
- *Cost Center
- *Fund
- Additional Worktags
- Billable

Column Preferences

- Order
- Company
- Spend Category
- *Fund
- *Cost Center
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- Tax Recoverability
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- Quantity
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- Billable

Apply Reset

Uncheck the items you do not want to see in your view. Click the items individually and drag them to change the order.

Click Apply.

Notifications in Workday via Email:

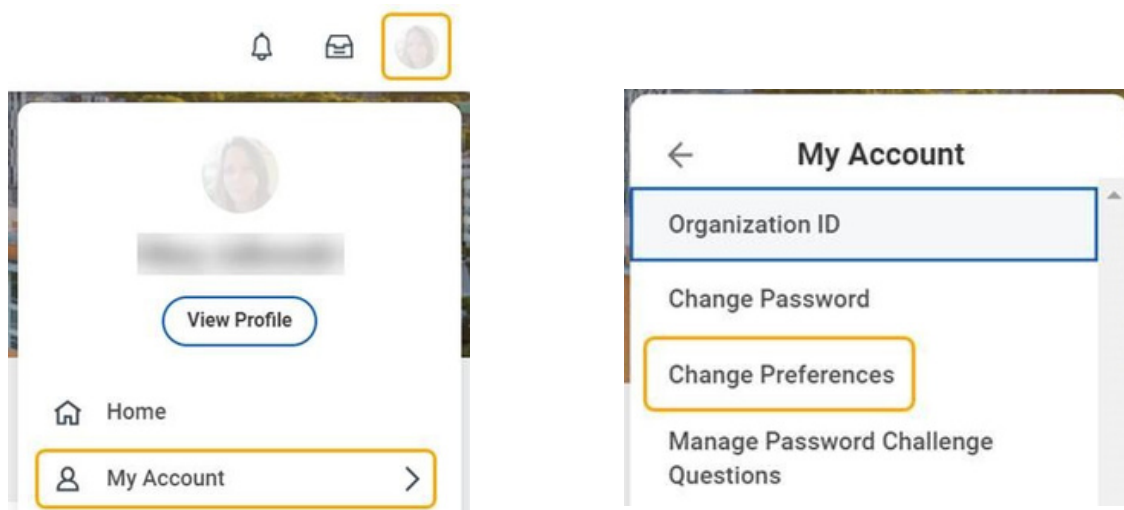
Each time you receive an task in Workday, you will receive an email notification to your Outlook account prompting you of the pending item that requires action.

If you receive many Workday email notifications, you can reduce the frequency of these emails. There are three frequency options for email notifications:

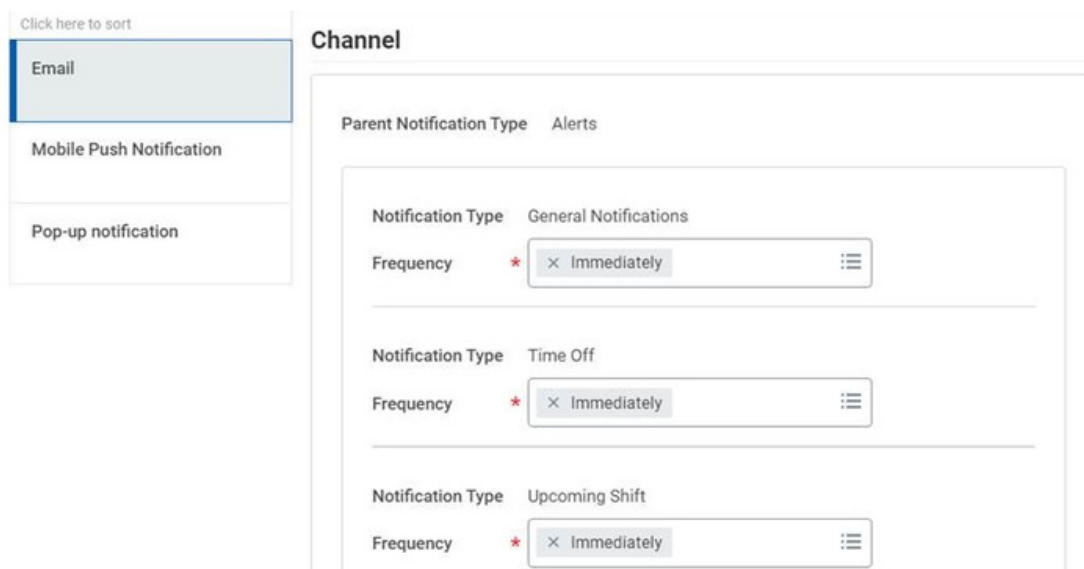
- Daily: A 'Daily Digest' email is sent containing all new notifications from the last 24 hours.
 - Refer to the [Appendix](#) for details about this option.
- Immediately (default): A separate email is sent for each a new notification.
- Mute: No emails are sent for the notification type.

⚠ If you prefer to not receive email notifications Immediately, it is advised to select Daily. **Selecting Mute will prevent any email notifications of that type, which may have negative consequences, and is not advised.**

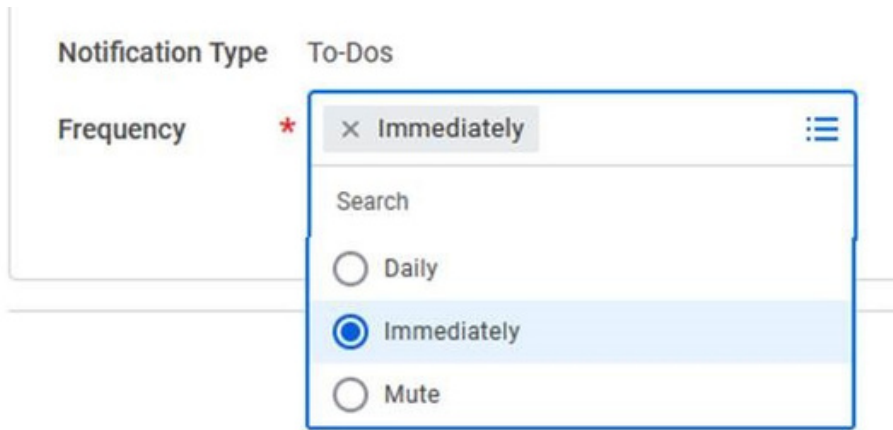
1. To turn off these email notifications, click your Profile icon in the top right corner of the Workday screen and go My Account > Change Preferences.



2. Scroll down to the Channel section, where Email is located. All of the notification frequencies are set to 'Immediately' by default.



3. Select the frequency you'd like for each type of notification email.



The screenshot shows a user interface for configuring notifications. On the left, there is a table with two columns: 'Notification Type' and 'Frequency'. The 'Notification Type' is set to 'To-Dos'. The 'Frequency' dropdown menu is open, showing three options: 'Immediately' (selected with a blue radio button), 'Daily' (unselected), and 'Mute' (unselected). A search bar is visible above the options. The dropdown menu is highlighted with a blue border.

4. Click **OK** to save changes.



Knowledge Based Article Highlight

To avoid creating duplicate employee records when hiring, follow the Recruitment Candidate Guide to ensure the candidate profile is accurate and ready to use before moving your successful candidate to the Employment Agreement stage in Recruitment.

[Please review the Recruitment Candidate Guide.](#)

Text Added to Workday Career Sited to support Workplace Accessibility

The Sidebars on the External Career Sites and the Find Jobs report on the Internal Career site will include this information:

'If you have any accommodation or accessibility needs during the job application process, please contact the Centre for Workplace Accessibility at workplace.accessibility@ubc.ca. This email address supports both UBCO and UBCV.

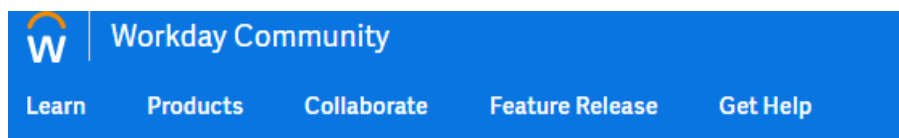
Workday Community

Workday Community is a platform for collaboration, networking and learning with fellow Workday@OK users. It also provides documentation and access to the questions fellow Workday@OK users are asking.

This is also where you can find “Brainstorms”. Brainstorms allows customers to submit product enhancements or new features. It allows customers to vote for one another's submissions, which allows Workday to gauge the need for the brainstorm ideas. The highest voted “Brainstorms” generally are what Workday prioritizes for its upcoming new releases.

Anyone can create a Workday Community account. I encourage you to do this, and then navigate what is available on this site.

To create your own Workday Community account, please click [here](#) and sign-up, following all prompts.



Home > Search Results

Workday Resources



Resources:

[August Newsletter](#)

[Workday Release Updated Completed on Sept 9](#)

[Process for Updating Home and Work Contract Information Now Separate](#)

[View my Professional Development Fund](#)



Workday Wednesday Sessions:

Topic: **Match Exceptions (Refresher)**

Date/Time: October 11, 2023 | 10:00 am

[Meeting Link](#)

Topic: **Payroll**

Date/Time: October 25, 2023 | 10:00 am

[Meeting Link](#)

Topic: **Procurement Basics**

Date/Time: Nov 1, 2023 | 10:00 am

[Meeting Link](#)

Topic: Spend Authorizations/Cash Advances

Date/Time: Nov 22, 2023 | 10:00 am

[Meeting Link](#)



Contact the Integrated Service Centre

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

[Submit a Workday support request here](#)

Hours of operation: Monday - Friday | 8:00am - 5:00pm

