

HCM Reporting Call-In Q&A

Below are the transcribed questions and answers from the IRP HCM Reporting Call-In held on December 2, 2020.

Topic	Question & Answer
<p>Additional Reports</p>	<p><i>Q: How will I know when a new report has been added to the report library?</i></p> <p>A: Updates such as this will be added to Workday This Week. Here you can find communications about upgrades and changes in the system that are shared with the broad community. Things that are specific to the HR functional user team with elevated security access, or the finance side, will be answered in those specific areas. You can access this through https://isc.ubc.ca</p>
<p>Report for Student Jobs</p>	<p><i>Q: Where do I find a report that runs all the student jobs ending soon?</i></p> <p>A: Employees with Upcoming Term End Dates can help with this. Please input "Student Employee" for the Job Category and the Employment End Date Less than or Equal to before running the report.</p>
<p>Report for Specific Program/Grant/Cost Center</p>	<p><i>Q: Is there a report that shows payroll details for a specific program/grant/cost center?</i></p> <p>A: You can run Payroll Summary - Distributed report. For reports that show payroll details, since these details are quite confidential, we are careful in who we give access to them. If you cannot see particular details on these reports, it is likely because you do not have this access.</p>
<p>Report for "in flight" Transactions</p>	<p><i>Q: Is there a general 'in flight' transaction report for all HR processes? I know there is "business process transactions of type awaiting action" but I want to see where all hires are - not just the 'hire' step.</i></p> <p>A: Two reports that may serve your needs are New Hires Data, and Staff New Hires. It is recommended that you search key words in the Report Name Change Tracker to see what options come up (requires VPN).</p>
<p>Report for Salary & Benefits info in Specific Grant</p>	<p><i>Q: When there are multiple employees paid from a grant, is there a report we can run to pull the salary and benefits for only one employee?</i></p> <p>A: Please try the report "Payroll Summary - Campus".</p> <p><i>Q: Can't find a report to see all the hours submitted and approved by pay period. What is it? I can only a report for finding hours submitted but not approved.</i></p> <p>A: You can see the status of a time block by using the report View Time Blocks by Position which shows employee name, employee ID, status, and time block. Status refers to whether the time is Submitted or Approved.</p>

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<p>Employee with Upcoming Termination Date Report</p>	<p><i>Q: Yesterday we tried to run Employee with Upcoming Termination Date report (Expiring student appointment report in HRMS), but in Workday this report doesn't show student's supervisor's name and speedchart. Kindly advise.</i></p> <p>A: This could be made into a request for enhancement through Service Now.</p> <hr/> <p><i>Q: Certain reports (e.g. Employee with Upcoming Term End Dates) asks you to enter the employment group in order to run the report. Is there a way to run the report by entering the department or unit instead of the employment group? For people who have Central HR access the report returns campus wide results which can be problematic.</i></p> <p>A: I think this is a request for an enhancement of adding a new filter to a report. To clarify about enhancements, if there is one small change that you want on a report, we cannot say yes to everyone, but we can make enhancements on a priority basis. These enhancements help to get the data you want in an easier manner. You can make these requests through a service now ticket. Otherwise, you can export reports to excel and filter according to your needs.</p>
<p>Report for Time Blocks</p>	<p><i>Q: The timekeeper function seems fairly useless. Even with delegation, the user cannot see detailed absence dates (like PAT) in a simple chart form unless a staff sends an action. However, once that action is approved, the user (with delegation) can no longer see this information. They can see the balance but not the breakdown. They might see the absence weekly calendar if they were assigned "timekeeper function".</i></p> <p><i>What kind of report can a user run so they can see the breakdown of all balances for the entire unit (similar to PAT)?</i></p> <p>A: Yes, there is a report for this. This is My Team's Reported Time wherein you may see a weekly view of time blocks for employees. This is available to the Manager and the Timekeeper. Your visibility of reports will depend on your security role and supervisory organization. If a report does not provide what is needed, please have a conversation with your HR leadership to determine whether this is access that you do need. There are many reports available, so it can be helpful to look at the frequently used reports (see presentation slides) to better understand which report should be run to serve your needs. If you are unclear on which report to use, you can reach out to the ISC to be pointed in the right direction, and to the right report.</p>
<p>Report to include all applicable Sup Orgs</p>	<p><i>Q: Can we run a report that includes all Sup Orgs that we support, not having to enter each single Sup Org?</i></p> <p>A: That report is not yet available. At Go-Live, payroll was our number one priority, but now we are able to focus more on reporting and security.</p>

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	<p><i>Q: I'm a department administrator. I'm finding so many of the reports you can only select to run it by Sup Org not the department. So then, for example, even if you pick the department head, it only has their direct reports. Some have the option to include the sub Sup Orgs but not all. How difficult is it to add the sub Sup Org check box for them?</i></p> <p>A: This may be possible as an enhancement, however in some cases the report is attached to an object that we cannot modify. With standard reports it can be extra work to make these changes, but for custom reports it would just be an enhancement. Go ahead and make a request via a ticket, and if it is viable we will put it in the priority sequence.</p> <p><i>Q: For some key reports, like Current Employees' Job Information for example, you can only select one organization at a time and you cannot include subordinate organizations. As a Senior HR Partner, I support a large number of Sup Orgs within our team - how can I pull these types of reports for the whole team I support?</i></p> <p>A: Currently, you will need to select individual organizations to run the report. If you are looking to pull a consolidated view by Sup Org to understand reporting relationship, this report is not available at this time.</p>
<p>Report Missing Columns</p>	<p><i>Q: It is not about the report not existing, but it is more about how the data are presented in a report and how the report can be run (like only based on a single Sup Org?). Some key columns are missing in the reports (like the units, the title/rank). The filter function is not very helpful as there is no way to limit the report results within the Sup Orgs that we support.</i></p> <p>A: This is a challenging question because this may be different for each individual report and cannot be answered in general terms. The best course of action is to present this concern in a Service Now ticket alongside the name of the specific report you are using. Then, we can drill into how we would answer that question for that exact report. It is possible that there is a different report that would work better for you, or that enhancements are needed to the report you are using.</p>
<p>Report for Historical Info by ID</p>	<p><i>Q: A key HR report in HRMS was the 018 "Historical Info by ID" report. Central HR/Advisory used this report extensively. It does not appear in the Report Name Change Tracker. Do we know if this report is being built in Workday?</i></p> <p>A: Yes, it is. We are close to having it in Production. The Worker History Summary report is similar, but it missing a couple of fields that will be included in the upcoming report.</p>
<p>Report for Vacation Balances</p>	<p><i>Q: Can HR run a vacation balance report for an entire unit?</i></p> <p>A: Time Off Results Summary and Time off Results Detail can be run by Managers or those in a HR role. Keep in mind that you can only run by Sup Org, so if you need information on multiple Sup Orgs, you may need to run the report a couple of times.</p>

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<p>Real Time Report</p> <p>Report for Training/Workplace Learning</p>	<p><i>Q: I ran the same report to summarize data throughout the day, and by the end of the day, the same data was different because of new appointments. Is there any alert that lets you know when data has changed?</i></p> <p>A: The data is real time. Although there isn't an alert, you can schedule the report to run daily to view the latest version of the report.</p> <p><i>Q: Training reports (9xx) don't seem to be available in either the Name - Change Tracker or the list of Retired Reports - where do we retrieve that information now?</i></p> <p>A: You could check out Workplace Learning related reports: UBC Certifications out of Compliance, Completion of UBC General required training for Onboarding, Training Courses taken by a worker, and/or Training courses not taken by worker. A larger number of training courses were consolidated into these four reports.</p>
<p>Report to See Security Role Accesses</p>	<p><i>Q: Is there a list of reports available and security roles required to pull each report?</i></p> <p>A: You can run Custom and Standard Reports List.</p>
<p>Downloading Report Name-Change Tracker</p>	<p><i>Q: Is there a way that I can download the Report Name-Change Tracker and the Workday Custom and Standard Reports in Excel format for ease of viewing and manipulating?</i></p> <p>A: Yes. You can click on the Download button on the bottom right of the screen, then select Crosstab as your file format.</p>
<p>“Conversion” in HR Business Processes</p>	<p><i>Q: Will the Conversion BP be cleaned up over time or do the employee records that have been transferred to Workday stay coded as Conversion?</i></p> <p>A: The Conversion BP will be cleaned up over time.</p>
<p>Time Tracking for Students</p>	<p><i>Q: Why are some hourly student appointments converted from FMS showing with 40 max. work hours? Should we correct this in Workday?</i></p> <p>A: For hourly student, they will use Time Tracking function to log their hours. No correction needed in Workday.</p>
<p>ISC Tickets</p>	<p><i>Q: Users find it hard to tell whether it's a Workday not able to perform problem vs access problem. In my previous interactions with ISC, tickets were being ignored and when they come back I was asked to wait for the batch update.</i></p> <p>A: To request security role change, please refer to the Knowledge Base Article. before proceeding with your request to ISC.</p>

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<p>Payroll Summary – Distributed Report</p>	<p><i>Q: Does the Payroll Summary - Distributed report capture all payroll transactions in a specific program/grant/gift/project worktag? The Payroll Ledger of PeopleSoft did not show benefits-insurance, payroll JVs processed by the Payroll team, and departmental JVs that re-allocated payroll expenses.</i></p> <p>A: The Payroll Summary - Distributed report captured the breakdown of payroll transaction by employee by month as well as the YTD amount and total obligation for specific program, cost center, worktags etc.</p>
<p>Report and Delegation</p>	<p><i>Q: Is there a report on what delegation has been set up within a unit and not just by Sup Org?</i></p> <p>A: You can search for Current Delegations and input the top level Sup Org name. Check the box of "Include Subordinate Organizations" before running the report.</p> <p><i>Q: Is there any way to delegate access to reports? Or how would you suggest a manager allow a designated admin person (who doesn't have timekeeper security access) to view reports, especially timekeeping reports?</i></p> <p>A: The manager can download the report and send to the admin person.</p>
<p>Filter Report & Download Report</p>	<p><i>Q: When you apply a filter to a report, it doesn't seem to allow you to export the filtered data to Excel - it just exports the whole report. Can this be changed?</i></p> <p>A: Currently you will need to filter after exporting the report to excel or copy the filtered report and paste to blank excel.</p>
<p>Report & Security Access</p>	<p><i>Q: When reports are run (e.g. the student employees with upcoming term dates) I can see all of campus. I thought that I should only see those in my unit.</i></p> <p>A: Your access to data is determined by the security role assignment. If you notice your access is beyond what is needed for the tasks you do, please talk to your manager regarding the right level of access and submit a ticket to ISC for security role removal.</p>
<p>Carryover Forfeited in Period</p>	<p><i>Q: What does the "Carryover Forfeited in Period" refer to? It is my understanding that "excess vacation" more than 10 days will not be automatically remove the extra days. How should supervisors handle this? If we need to remove them, what code should we use?</i></p> <p>A: Please see Knowledge Base Article for more information on Carryover Forfeited in Period. No action is required at this stage.</p>
<p>Specific Fields in a Report</p>	<p><i>Q: Who should we contact if we determine that a field being pulled into a report is not pulling the correct information? Should we submit a ticket when we encounter this?</i></p> <p>A: Please submit a ticket regarding specific field of a report.</p>

Integrated Renewal Program

Topic	Question & Answer
Workday This Week	<p><i>Q: How do we access Workday This Week archives?</i></p> <p>A: Workday this Week archives can be accessed from here.</p>
Job & Account Information - Current and Future Employees	<p><i>Q: I ran the FMS equivalent report of 005 in Workday and it does not include the WT? It does not have a start-end, effectivity date, etc. Will there be another report built similar to 004, 005 and 018, among others?</i></p> <p>A: Job & Account Information - Current and Future Employees has column on Recent Hire Date, which is the start date.</p>