

# INTEGRATED RENEWAL PROGRAM HCM CALL IN EVENT

**We will begin shortly - please note:**

- We have **muted your audio and turned off your camera** to ensure higher quality sound during the session. **Please ensure your audio and camera remain off** throughout the entire presentation.
- To **ask questions** during the session, please use the **Zoom Q&A function**.
- If you have a technical issue during the session, please use the **chat** feature.
- We will **answer questions throughout the session** as time allows.

# LAND ACKNOWLEDGEMENT

We acknowledge that UBC's two main campuses are located on the traditional, ancestral and unceded territories of the [x<sup>w</sup>məθk<sup>w</sup>əy'əm](#) (Musqueam) and [Syilx](#) (Okanagan) peoples, and that UBC's activities take place on Indigenous lands throughout British Columbia and beyond.



# INTEGRATED RENEWAL PROGRAM

## Reporting Call-in Event

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December 1, 2020

# WELCOME

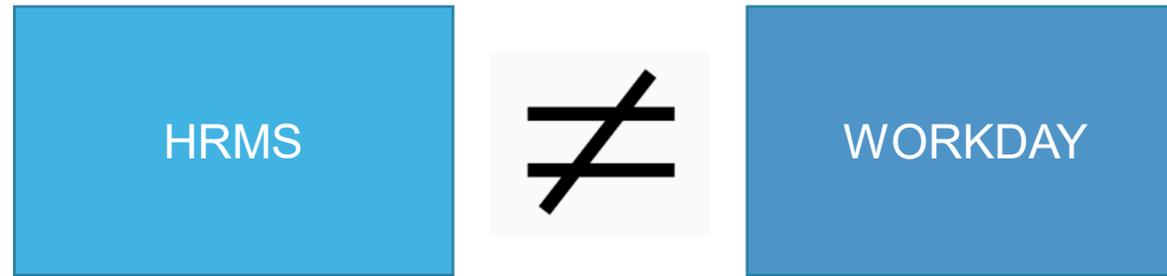


# TODAY'S AGENDA

Topic	Timing
Introduction	5 mins
Workday and HRMS – How things are different	5 mins
Before we get started	5 mins
Frequently Used Reports & Security Access & Demo	10 mins
Next Steps	5 mins
Support and Resources Available to You	
Q&A	30 mins
	60 mins

# WORKDAY AND HRMS – HOW THINGS ARE DIFFERENT

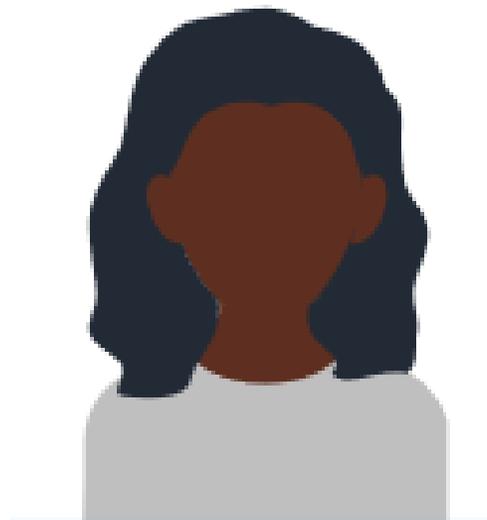
# WORKDAY AND HRMS – HOW THINGS ARE DIFFERENT



- The underlying data model from HRMS to Workday is different. This means:
  - Data is more visible which makes things easier to access and read in real time.
  - Data is not tracked or managed in the same way.
  - What you can access is determined by your security role.

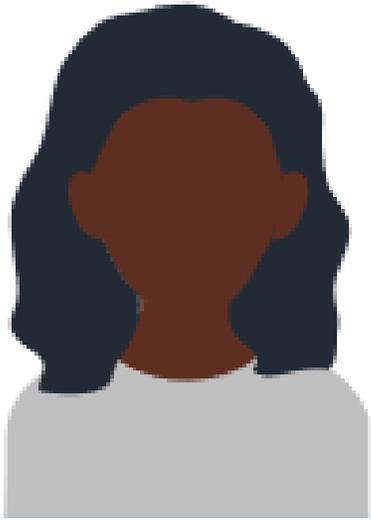


# WHAT DOES THAT MEAN FOR ME?



- You may have different access to data and reporting based on your security role.
- There is not a 1-to-1 comparison of existing reports to new reports in Workday. Some reports are retired or have been restructured.
- You may need to request additional permission to access key information.
- If you have multiple security roles, one of them may allow you to **view more information** in reports than other individuals who do not have that additional security role.

# RELATIONSHIP BETWEEN SECURITY ROLES & REPORTS



HR Analyst



Organization A



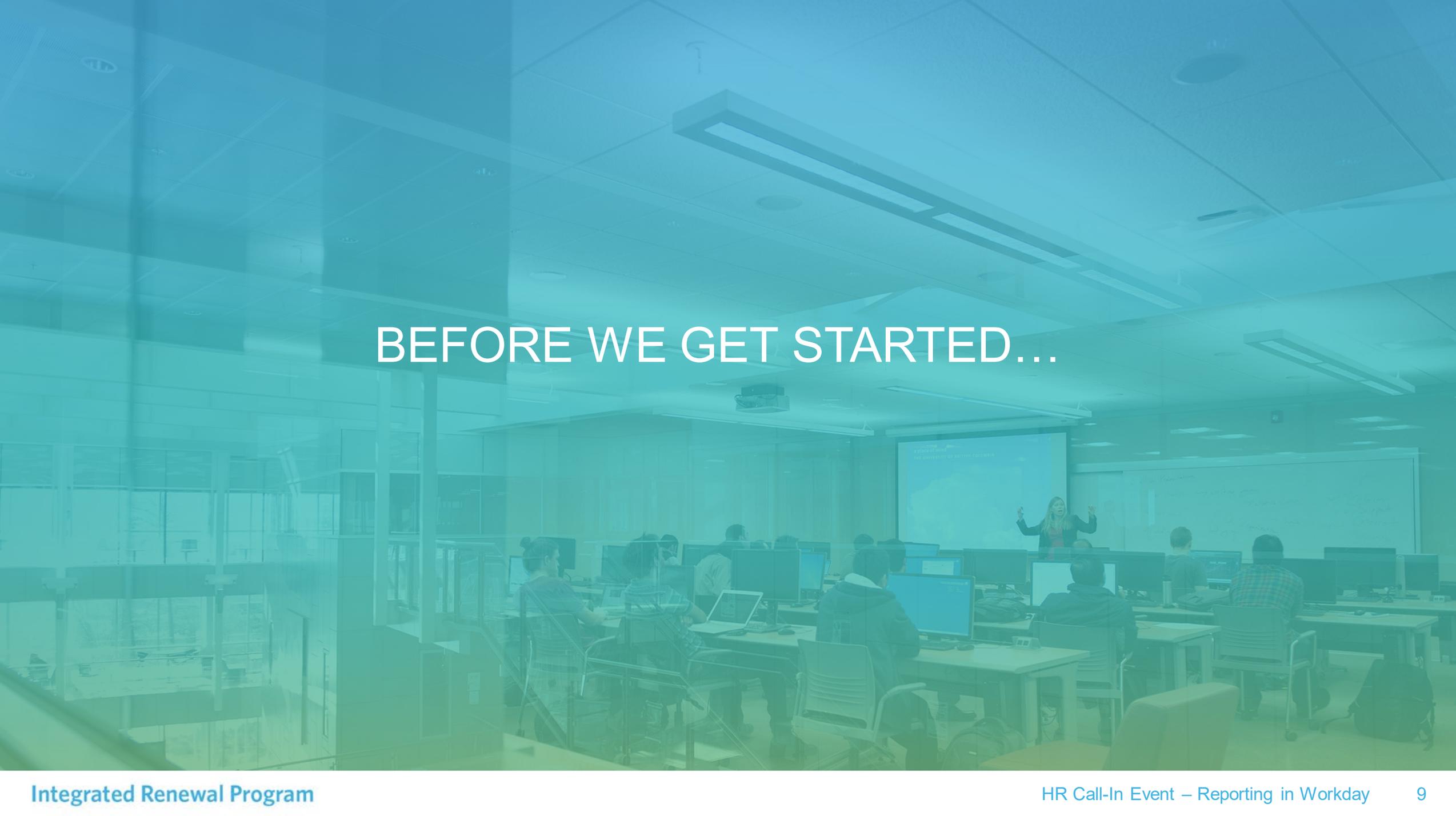
Organization B

In this example, you have a security permissions for Organization A but not Organization B:

- You will only be able to view reports and see data for HR Analyst from the organization you have the role in, A.
- If you need to see the data from Organization B, you will need to request to have the security role for that organization as well.

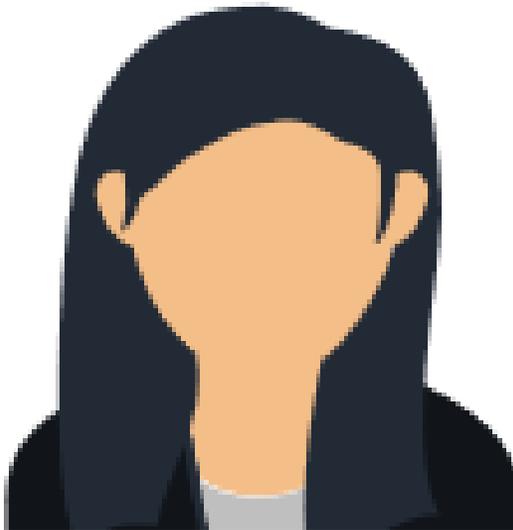
If you need a role assigned, please visit [Knowledge Base Article](#) for more information.





# BEFORE WE GET STARTED...

# “I CAN’T FIND MY REPORT...”



- [Workday Reports Catalogue](#) is a helpful tool to provide crosswalk between HRMS & Workday.
- You can search by:
  - typing all or part of the report name
  - using a prompt to narrow down search results
- You can filter reports to find the data you are looking for
- If you are looking to pull a consolidated view by SupOrg to understand reporting relationships, this report is not available at this time.

# REPORT DASHBOARD NAVIGATION

## Report Name-Change Tracker

Click here to find the new name of a legacy report or to find new Workday reports.

## Workday Custom and Standard Reports

Click here to find a comprehensive list of all Workday reports.

## No Longer Needed (Retired) Reports

Click here to find reports that are retired.

See definitions of terms used in the above dashboards here -->

[Dashboard Terms](#)

Review the new  
Workday name for  
existing legacy reports

Access a list all  
Workday reports

Access a list all  
retired Workday  
reports

Link to Report Dashboard:

[https://reports.im.it.ubc.ca/t/CDO/views/ReportsDashboard/MainMenu?%3AshowAppBanner=false&%3Adisplay\\_count=n&%3AshowVizHome=n&%3Aorigin=viz\\_share\\_link&%3AisGuestRedirectFromVizportal=y&%3Aembed=y](https://reports.im.it.ubc.ca/t/CDO/views/ReportsDashboard/MainMenu?%3AshowAppBanner=false&%3Adisplay_count=n&%3AshowVizHome=n&%3Aorigin=viz_share_link&%3AisGuestRedirectFromVizportal=y&%3Aembed=y)



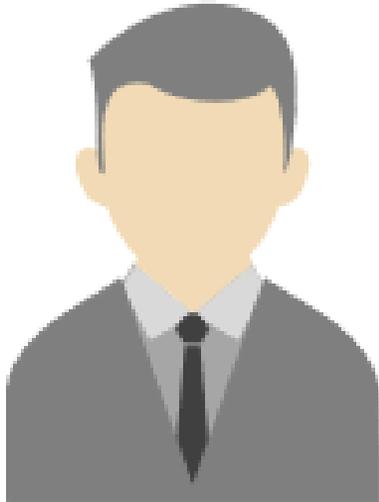


## HR REPORT DEMO

# Dashboard Overview – How To Find an Existing Report in Workday

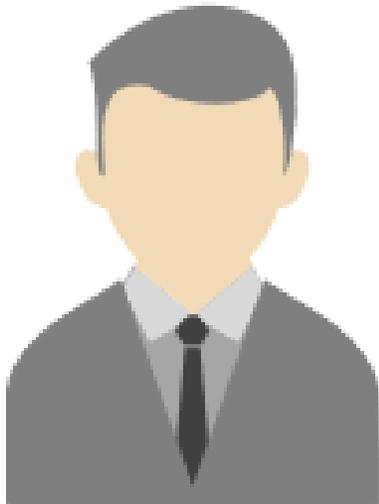


# “I NEED A NEW REPORT...”



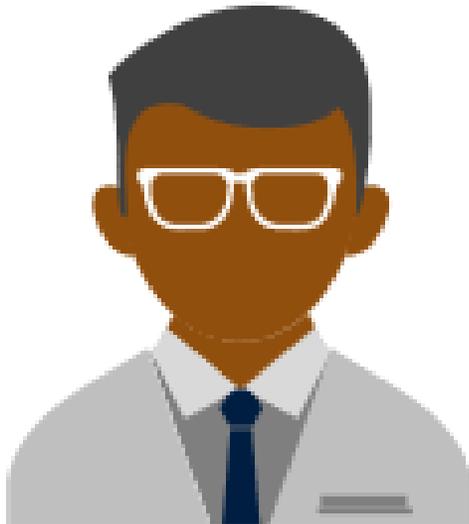
- A large majority of reports requested already exist in Workday.
- If you can't find the report, you may need to request it from the Reporting team.
- We will work with you to define a new report based on your requirements, based on priorities.

# “I CAN’T SEE THE SAME REPORTS...”



- You can view a list of all reports from the dashboard.
- **You may need to request additional security role access** to see your reports.
- Your report may be part of a different report.
- Your report may be retired.

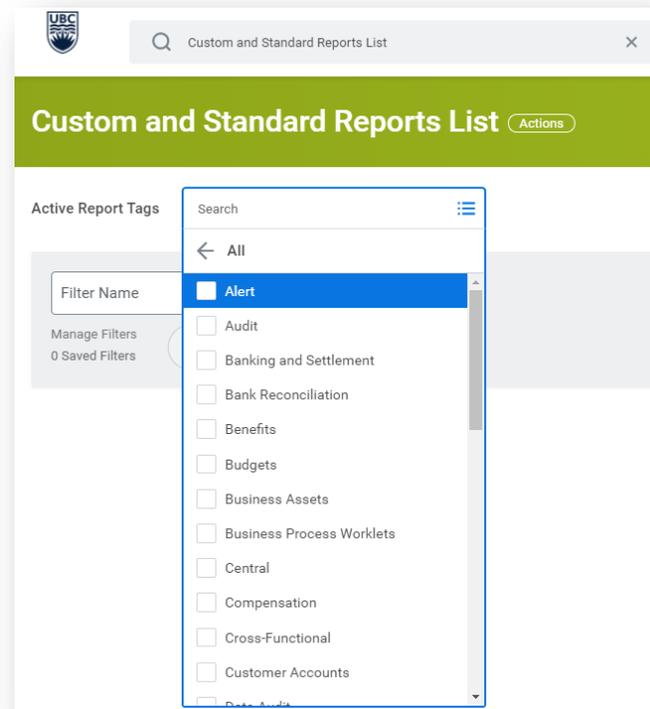
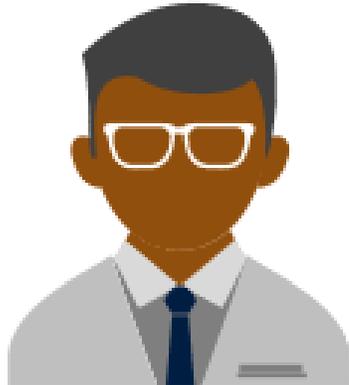
# “WHY AM I GETTING UNEXPECTED RESULTS?”



- Blank columns – this may be due to privacy restrictions based on your security role.
- Error messages – you may not have permissions to access the report entirely.
- Sequence and label of fields – decisions were made to standardize sequence and labels.

# “HOW CAN I FIND OUT ABOUT THE REPORTS I CAN RUN?”

- Run the “Custom and Standard Reports List” in Workday.



- This report showcases what you can access and view.
- You may need to request additional security role access to run reports to complete work.

# CUSTOM AND STANDARD REPORTS LIST

## Custom and Standard Reports List Actions

This list does not include XpressO reports

444 items

Report	Report Purpose	Report Description	Active Report Tags	Report Type	Report Owner	Roles Allowed to Run Report	Created Moment
AAPS Activity Summary	List of AAPS employees' appointment activities each month. Shows activities such as reappointments and extensions.		Migration Ready	Advanced	3350e279386447f09392525a730dc272 / Nathan Miller	<ul style="list-style-type: none"> <li>Absence Partner</li> <li>Academic Administrator</li> <li>Academic Chair/Manager</li> <li>Academic Dean</li> <li>Academic Executive</li> <li>More (159)</li> </ul>	2020-10-08 08:16:50.056 AM
AAPS Monthly Employee Data	To ensure compliance with the collective agreement, exactly as specified in the sample. This report is given to AAPS. Helps determine which employees have started with UBC, which employees to add to the AAPS contact list, track membership FTE percentage for dues, track seniority. May want to check with AAPS on exact usage.  Report Prompts: None Report ID: COM-RPT-21	Report ID: COM-RPT-21	Migration Ready	Advanced	3350e279386447f09392525a730dc272 / Nathan Miller	<ul style="list-style-type: none"> <li>Absence Partner</li> <li>Academic Executive</li> <li>Accounts Payable Manager</li> <li>Accounts Payable Manager (Unconstrained)</li> <li>Benefits Administrator</li> <li>More (93)</li> </ul>	2020-10-08 09:40:17.323 AM



# REPORT REMINDERS

- You can export reports to excel (You may need to learn more about Excel filtering and sorting).
- You can convert report to graphs
- You can schedule reports
- You can add reports to Quick Access or Favorites

Please see the [Knowledge Base Article – Reporting Basics](#) for more information.



# FREQUENTLY USED REPORTS & SECURITY ACCESS

- HCM CORE
- TIME TRACKING
- ABSENCE



# FREQUENTLY USED REPORTS – HCM CORE

How do I...	Report Name	Description	Security Role(s)
Look at business processes that are awaiting action?	<b>Business Process Transactions of Type Awaiting Action</b>	View every business process of the specified type that is awaiting action, on whom, for how long. You can also delegate awaiting task to someone else.	<p>Talk to your manager or HR Director if you need to be given access to this report.</p> <p>There are no secret reports. Access to a list of reports is open to everyone.</p>
Look at current employee information?	<b>Current Employees' Job Information</b>	Job information for current employees with no salary information.	
View information about current and future employees?	<b>Job &amp; Account Information - Current and Future Employees</b>	Employees with joint appointments, head count reports, staff probationary and mid-point eligibility	
Understand the employees' snapshot with tier code?	<b>Employees Snapshot with Tier Code</b>	Provides a list of employees who were active as of a specific date, with compensation, earnings code, and job tier. Often used in strategic reports.	
Access roles within my organization and understand subordinates?	<b>Roles for Organization and Subordinates</b>	View the organization hierarchy of subordinate org. Enables you to click on an org and see all of the org roles and the worker in each one.	
See the workers I support?	<b>Workers I Support</b>	[None available for this standard report]	





# FREQUENTLY USED REPORTS – TIME TRACKING

Here are some frequently used reports in Workday & corresponding security access:

How do I...	Report Name	Report Description	Security Role(s)
View an employee time blocks?	<b>View time blocks by position</b>	Shows employee ID, name, time blocks, their status and Payroll Status	Manager (Direct Reports)  Timekeeper (to the assigned SupOrgs and applicable sub-SupOrgs)
See time blocks and historical status of time blocks?	<b>Time Block Audit</b>	Shows time block in and out by worker and historical status on time blocks (created, submitted, approved)	
View time blocks for a given period?	<b>Reported time blocks for a worker</b>	Shows time blocks, worker names, reported dates and time entry code in a given time period	
Review time trends over the last 6 weeks?	<b>Reported Time Trends</b>	View the total reported time that has been approved for supervisory organizations over the last 6 weeks. This provides an easy way to see trends in reported time.	
See a weekly view of time blocks for employees?	<b>My Team's reported time</b>	Displays the reported time block hours for the employees in a supervisory organization. By default, the report displays reported time from the manager's first day to the last day of the current week.	



# FREQUENTLY USED REPORTS -ABSENCE

Here are some frequently used reports in Workday & corresponding security access:

How do I...	Report Name	Report Description	Security Role(s)
See all employees on leave?	<b>Workers on Leave</b>	Provides a list of all employees on leave	<i>Depending on the leave type</i> Manager Senior HR/FR Partner
See all employees returning from leave?	<b>Workers Returning from Leave</b>	Shows workers that are due to return from leave	HR Admin, HR Exec, HR Analyst, HR Partner, Central HR, Absence Partner
View vacation payout information per employee?	<b>Vacation Liability by Employee</b>	Shows the vacation payout liability per employee	Manager
Determine a high-level breakdown of time off balances – accrued YTD and absences taken YTD?	<b>Time Off Results Summary</b>	Shows by organization and worker, the high-level breakdown of time off balances, accrued YTD and absence taken YTD	Senior HR/FR Partner, Benefits Partner, HR Admin, HR Exec, HR Analyst, HR Partner, Central HR, Absence Partner Payroll, HR Auditor
See a detailed breakdown of time off balances – accrued YTD and absence taken YTD?	<b>Time Off Results Detail</b>	Shows by organization and worker, the detailed breakdown of time off balances, accrued YTD and absence taken YTD	

# NEXT STEPS

# NEXT STEPS & KEY TAKEAWAYS

Explore new way of how data is structured with your team

Identify critical reports needed for your team

Submit a ticket to ISC if you have an issue that cannot be solved



# NEXT STEPS & KEY TAKEAWAYS

Before submitting a ticket to ISC regarding reports, take the following action:

1. Check out [Workday Reports Catalogue](#)
2. Try to search the report using a different key word
3. Input the prompt of specific Sup Org to narrow down your report
4. Use filters and sort functions to make your report meaningful for your purpose
5. Check your security role(s)





# SUPPORT & RESOURCES AVAILABLE TO YOU

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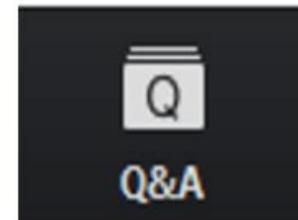
- Review relevant Knowledge Base articles on the UBC Self-Service portal:
  - [Workday This Week](#)
  - [Reporting Basics](#)
  - [Advanced Reporting](#)
  - [Understanding Workday Security Roles](#)
- View the presentation and recording from this session and sign up for events and training on the IRP website:  
<https://irp.ubc.ca/office-hours-events>



# Q&A

## ★ To ask questions....

Click on the Q&A icon at the bottom of your screen in Zoom to open the Q&A box and type in your questions and view questions from colleagues. You can up vote your colleagues questions by pressing the “thumbs up” next to the question. **We will be answering the most upvoted questions in this Q&A session.**





THANK YOU!

# APPENDIX

# “HOW DO I SCHEDULE A REPORT?”



**Step 1:** Search for “Schedule a Report”

**Step 2:** Input report name and pick Run Frequency

**Step 3:** click OK

To revise frequency, or delete previous schedules, search for “Scheduled Future Process”, select “Report” under Process Type, and use related action to edit schedule Future Process.

A screenshot of a mobile application dialog box titled "Schedule a Report". The dialog has a green header bar. Below the header, there are two input fields. The first is labeled "Report" with a red asterisk and a search icon. The second is labeled "Run Frequency" with a red asterisk and a dropdown arrow. The dropdown menu is open, showing options: "Run Now" (highlighted in blue), "select one", "Run Once in the Future", "Daily Recurrence", "Weekly Recurrence", "Monthly Recurrence", "Dependent", and "Custom Recurrence". At the bottom of the dialog, there are two buttons: "OK" (orange) and "Cancel" (grey).