Workday Student Launch 2 - User Guide

Last updated: April 3, 2024

Contents

Purpose

The purpose of this document is to provide our UBC Community with important information about Launch 2 of Workday Student, beginning February 26, 2024. For questions relating to Launch 2 of Workday Student, please reach out to your Primary Transition Lead.

Key Highlights

- Classic SIS is still the system of record for 2023 Winter and 2024 Summer
- Workday is the system of record for 2024 Winter session and beyond
- What does that mean?
  - Tasks and processes relating to 2023 Winter and 2024 Summer will still take place in Classic SIS
  - Tasks and processes relating/affecting 2024 Winter will take place in Workday
- Suggestion: Log into both systems while you are pulling up student records to get more comfortable with the screens and how the information is shown
- The training tenant will still be available for training and continual learning on the training content

Data Catch-up

- Launch 2 will be taking a phased approach and begin on February 26, 2024
- Most Launch 2 users will not need to take any action until after March 11 as the system will be syncing data with Classic SIS between February 26 and March 10
- Launch 1 users will continue to use the system
- Workday Student is expected to be ready for use by our UBC Community by March 11, 2024

Coexistence and Dual Entry

- Both Classic SIS and Workday Student will be live and in use until September 2024
- Identified users need to perform certain tasks in both Classic SIS and Workday. Please check the Coexistence page
- Dual-entry tasks are required throughout the coexistence period

- Please refer to this website for more information: https://irp.ubc.ca/launch2

Tasks to do after March 11

- Staff and faculty advisors:
  - Add the Student Records and Advising app
    - Step 1: In the 'Your Top Apps' section, click on 'View All Apps'
    - Step 2: Click on 'Add Apps'
    - Step 3: Select 'Student Record and Advising'
    - Step 4: Click on the + sign
  - Configure the search bar in Workday to find student records
    - Step 1: Search for a name in the global search
    - Step 2: Select 'More Categories' and click 'Configure Search'
    - Step 3: Find 'Student' and click and drag it up to your 'Saved Categories'
    - Step 4: Click 'Save'
  - Enroll in Student Records Navigation Canvas Course:
    - Undergraduate
    - Graduate

- Faculty and instructors:
  - Once instructors have been assigned a course section, they will be able to add the Teaching app to their profiles:
    - Step 1: In the 'Your Top Apps' section, click on 'View All Apps'
      Step 2: Click on 'Add Apps'
    - Step 3: Select 'Teaching'
      Step 4: Click on the + sign
  - More information about how to use the Teaching app will be provided soon.

Ecosystem Applications

- From March 11 to September 2024 ecosystem applications will be released based on a phased approach
- IRP Student Ecosystem team will be available to support you until November 2024
- Helpful links:

- o IRP Student Eco Webpage: https://irp.ubc.ca/student-ecosystem-delivery
- o Eco App List: https://irp.ubc.ca/wdstudent-application-inventory
- o Please refer to the Global Ecosystem Application Changes web page for more information
- o Information Session Presentation for UBC Business/IT Eco application owners: Resource

Course Scheduling

- Please do not do any scheduling processes in Workday while the Enrolment Services Scheduling teams are working on room allocations through February and March 2024
- Course scheduling-related work and updates in Workday should begin in early April 2024, once edit access to the draft schedule is granted
- Please visit 2024 Winter Workday Student Resources for more information

Learner Financial Support

- SISC will still be used to process 2023 Winter and 2024 Summer award cycles until end of August 2024
- Workday/LFS can be used to process 2024 Winter award cycles starting on the release dates
- More details to be shared with LFS key stakeholders when the cutover planning is complete

Student Financial Management

- SIS will still be used to manage charges and payments for 2023 - 2024 Winter term 2 and 2024 Summer until August 2024
- Workday will be used to record admissions deposits (upon matriculation) and assess charges (upon registration) for 2024 - 2025 Winter and beyond
- Refunds of 2024 - 2025 admissions deposits will be initiated in Workday beginning March 11, 2024

- Workday will be used for maintaining student sponsors and recording student sponsor contracts for the 2024 - 2025 academic year beginning March 11, 2024. Student sponsor contracts for 2023 - 2024 Winter term 2 and 2024 Summer remain in SIS
- Student balances will be brought into Workday from SIS in late August 2024. SIS will remain the system of record for financial holds until this time
- A new Student Direct Stream (SDS) application will launch in September 2024 for the 2025 admissions cycle

Reporting in Workday

- In September 2024, the SISC will be offline, which means reporting tools like the Dynamic Search Engine (DSE) and Student-related Crystal will be affected:
    - Crystal Reports: Changes to these reports are expected as we transition from SIS to Workday
    - DSE: This is an SIS capability and therefore will no longer be connected to our student system. Workday reports and other new reports have been designed to support UBC data needs
- Workday will have some out-of-the-box reports and 300+ customized reports to meet UBC's operational and regulatory needs
- Business processes in the workday capture much of the information that used to be in SIS reports. Some of the reports that you needed to run in the past will be available via screens while you go through the business processes
- Access to reports may change as part of the new Business Processes and Security Roles
- External tools like Tableau and Appian will supplement Workday Reports
- Foundational Workday Reports training is currently available on WPL, and training for capability-specific reports will be provided to users as needed

Faculty and instructors

- Keep using the FSC until the end of August
- Start using Workday for your course sections for the upcoming 2024 - 2025 academic year after student registration in June when you may want to start looking at your new class lists

- Other than adding the Teaching app to your profile, no further immediate action is required in Workday

- There is no change to access to or functions in Canvas (e.g., creating course content, communicating with students or grade book entries)

- Features of the FSC are captured in solutions using the Workday and Final Grade Submission Tool

- Instructors will continue to use the FSC for grade entry, class lists, and email communication to students for their course sections related to 2024 Winter and 2024 Summer sessions

- Visit the [faculty and instructors resources web page](#) for more information. This page will be updated when more information is available

Students

- UBC Students will gain access to Workday on May 21, 2024

- When Workday Student launches in February, continuing students will still use the SISC for tasks related to the 2023 Winter and 2024 Summer sessions

- Students who are also currently employed by UBC will see a change to their Workday profile. Click [here](#) to learn more.

- Students will receive relevant information about their access and necessary actions ahead of May 21, 2024

- First tasks for students in Workday:
  - Add 3rd Party authorization
  - Add emergency contact information
  - Add direct deposit information

- Visit the [Student Readiness](#) page for more information. This page will be updated when more information is available

Training

- Training will be practical and hands-on and focus on the system's most common tasks, processes, and scenarios.

- The design and delivery of training for staff and faculty will follow a continual and consistent stepped approach
- For more information on the business uptake dates and ongoing training, please visit the website: https://irp.ubc.ca/staff-training
- Workday Student Training Hub provides a central and secure repository of all training resources, allowing easy access for our community
- Find relevant training material and how to use Workday Student here Training Hub (CWL required)

Workday Student Technical Support and Hypercare

- How to get technical support for faculty and staff
    - o Support and Resources
- For information on known issues and impacted users, please visit: https://irp.ubc.ca/launch/updates

Support for faculty and staff in student-facing roles

- We are currently exploring what support our community of faculty and staff will need during the transition and roll-out.
- **Support for Students**:
    - o Students with CWL/log-in issues: Go to UBC IT service desk webform to get technical assistance using the Help Desk Contact Form (https://it.educ.ubc.ca/it-support-for-students/)
    - o Students seeking help/clarification on something in Workday Student: Access self-serving "how-to" content that will be made available on student-facing web pages or reach out to their usual advising support channels such as Enrolment Services advisor(s) or Academic Advisors for help
    - o For Workday technical assistance, the student would not put in their own ticket, a staff member can submit a ticket through the portal on their behalf
- **Support for faculty and staff in student-facing roles**
    - o Will be trained in advance of new Workday functionality rolling out in line with the academic cycle
    - o Use training materials provided

- o Leverage the Transition Network where appropriate
- o **For non-urgent support needs**: If none of these available resources help resolve the issue/question, they could either email their question to IRP Student (integrated.renewal@ubc.ca), or attend an upcoming Training Q&A session
- o **For urgent support needs:** We are currently in the process of exploring how best we could support time-sensitive matters through live support channels.

Launch 2 web pages

- https://irp.ubc.ca/launch2
- Find the latest system updates
- Get support and resources information
- Find answers to common questions around Launch 2 of Workday Student