

# WORKDAY MANAGER READINESS CHECKLIST

This Readiness Checklist can help you and your teams prepare for Workday Go-Live on November 2 and understand the key actions you will need to take on Day 1 of go-live. Use this checklist to understand what to focus on to support your department or faculty.

## Manager Roles and Responsibilities

**My role as a manager is to work with my Transition Network to:**

- Support your faculty and staff through the transition to Workday
- Ensure continued function of unit (HR, Finance, etc.)
- Prioritize unit activities
- Acknowledge and recognize competing priorities (i.e., in view of the ongoing pandemic)
- Communicate with your team about Workday
- Listen to and address questions and concerns
- Connect your team to the right resources

## Priority Actions Before Go-Live

### People

Checklist	Things to consider	Responsibility (Name)	Information Required
<b>Faculty and Staff Understand Change Impacts</b>			
<input type="checkbox"/>	Host drop-in sessions or staff meetings so Faculty and staff understand the changes that impact their role (e.g., new, outdated, and altered processes).		
<input type="checkbox"/>	Faculty and staff have been notified and understand expectations for their role (e.g., responsibilities and accountabilities).		
<b>Faculty and Staff Understand New or Altered Processes on Day 1</b>			
<input type="checkbox"/>	Faculty and staff have completed all required training to prepare for go-live.		
<input type="checkbox"/>	Faculty and staff understand where to go to get IRP materials (e.g., job aids, tips and resources) and where to get help post go-live (e.g., UBC Self Serve)		
<b>Faculty and Staff Know How to Get Help</b>			
<input type="checkbox"/>	Faculty and staff know where to get support after go-live.		

### Technology | Documentation

Checklist	Things to consider	Responsibility (Name)	Notes
<b>Technology needs have been addressed</b>			
<input type="checkbox"/>	Individual system and computer access have been identified (correct browser is installed to access Workday).		
<input type="checkbox"/>	Ensure technology needs have been assessed as required (e.g., computers to access modern browsers)		

# WORKDAY MANAGER READINESS CHECKLIST

## Priority Actions After Go-Live

### People

Checklist	Things to consider	Responsibility (Name)	Information Required/Notes
<b>Informing Hourly Employees About Change Impacts</b>			
<input type="checkbox"/>	Let hourly employees on your team know that they need to enter their time by <b>Friday, November 6</b> (and every Friday, going forward) so that they are paid accurately.		
<b>Communicating with your Team</b>			
<input type="checkbox"/>	Host a team meeting or a "drop in" hour to support questions from your direct reports.		
<b>Supporting your Team</b>			
<input type="checkbox"/>	Remember it will take time for your teams to get used to Workday - keep an open dialogue, encourage questions and direct them towards appropriate resources.		
<b>Week 1 Tasks/Activities</b>			
<input type="checkbox"/>	Complete the Go-Live Checklist for employees (all staff and faculty).		
<input type="checkbox"/>	Review your Supervisory Org and <a href="#">make sure your direct reports are all included on your team</a> .		
<input type="checkbox"/>	<a href="#">Approve Hourly employee pay in Workday</a> by November 9.		

### Process

Checklist	Things to consider	Responsibility (Name)	Information Required/Notes
<b>Setting up your Workday Account</b>			
<input type="checkbox"/>	Log in to Workday and <a href="#">review your personal information</a> (make sure to make any changes to bring your profile up to date).		
<input type="checkbox"/>	Review your <a href="#">notification</a> preferences and update what types of alerts you would like pushed to your email inbox.		
<input type="checkbox"/>	Check your Workday inbox and complete any requested actions.		
<b>Revisiting Workday Training</b>			
<input type="checkbox"/>	Review available training understand how to navigate Workday. If you have not completed any training to date, <a href="#">start here!</a>		
<b>Week 1 Tasks/Activities</b>			
<input type="checkbox"/>	<a href="#">Ensure time is entered for all hourly employees in Workday</a> by Friday, November 6, and every Friday going forward.		
<input type="checkbox"/>	Set up any <a href="#">delegation</a> you would like to have in Workday.		
<input type="checkbox"/>	<a href="#">Submit your first expense</a> in Workday (if applicable).		
<input type="checkbox"/>	Review your vacation balance and enter upcoming vacation requests, if any, in Workday.		
<input type="checkbox"/>	<a href="#">Download</a> (optional only) the Workday app on your mobile phone so that you can access Workday to complete your Manager-related tasks from anywhere at your convenience.		
<input type="checkbox"/>	Bookmark the link to Workday in your browser.		

Note: HR Administrators will be re-entering transactions into Workday for future dated transactions e.g., reappointments, terminations that have an effective date November 16 or later. Managers may see additional approval requests during this time of transition.

**Questions?** After go-live, additional support for questions, issues, and requests will be available through the [Integrated Service Centre \(ISC\)](#).