Instructions

Worker Location Clean Up

Information effective October 29, 2024

Project Timeline: November 1, 2024 - January 31, 2025

Worker Location Field

This package is designed to support **HR administrators** in cleaning up incorrect **Worker Location** for existing employees within their portfolios.

Worker Location is the primary location where the employee works or operates from; this is generally at the "Building" level. It is set up at the original "Position Creation" but can also be updated when an individual moves position.

It is important to have correct and consistent Worker Location data as it is used for HR purposes such as HR Reporting, Emergency Contact, and other HR matters. Additionally, the Worker Location is used for other functions, such as in Procurement, where the "Deliver To" Location is defaulted when creating a Requisition.

Location information at the Worker level has been identified as inconsistently or incorrectly entered by different parties since Workday HR/FIN Go-Live and needs to be cleaned up. (See *Appendix #1* for examples of incorrect worker location information).

Key dates

DATE	ITEM	ACTION
Between November 1, 2024 to January 31, 2025	Clean-up project – clean-up Workday location data for existing employees	☐ HR administrators run reports and determine which employees have an incorrect Worker Location assigned in their WD profile following Step 1 ☐ Use one of the two available approaches (see Step 2) to update the employee's Location information.
Starting sometime in January 2025	Custom Validation (Error messages) will be added to certain Workday processes to ensure new employees hired will have Worker Location on the correct level. More	☐ HR administrators will encounter new error messages using certain Business Processes when hiring employees and creating positions. ☐ These validations will restrict people from entering Worker Location information on campus and floor levels.

	information will be shared closer to the date.	
TBD	Clean-up project Workday L Location data for unfilled positions (e.g., frozen, open, closed)	More to come

Instructions

Step 1. Identify employees with incorrect Worker Location

There are several ways to check peoples' Worker Location and identify whether the information is accurate or not. Below are more details on two approaches:

1. Individual Employees - the Worker Location can be found on people's Workday profile. Enter an employee's name and view their profile summary.
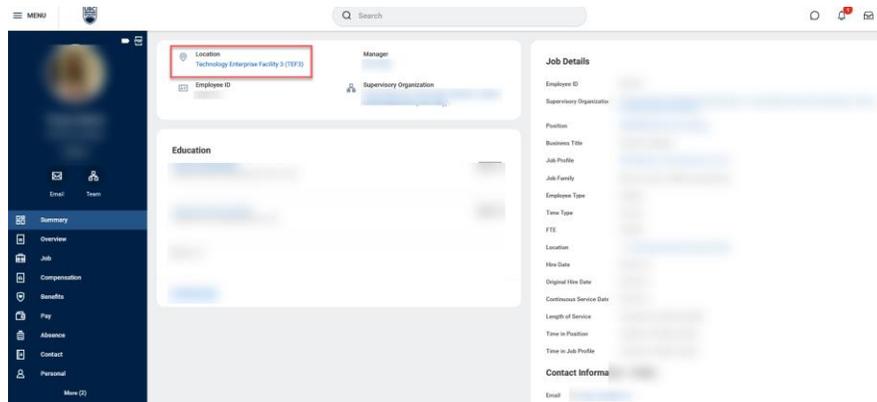
2. By Supervisory Organization - run the report '**Worker Location Audit for Mass Update – Distributed**' to get the details of the employees for the specified supervisory organization and their current Worker Location.
   a. Run the report:

b. Go through the report output and verify employees' Worker Location for accuracy. The report provides detailed information on employees' position(s), department and, of course, Worker Location to help with the verification process. *Note: For easier use, the report output can be exported to Excel.*

c. Note that the Worker Location has to be at the **Building** level. Any employees that have a Worker Location at the Floor, Room or Campus Level (see 'Location Type' field) need to be corrected. Those that are already at the Building level need to be reviewed and verified if the identified building is still accurate.

Step 2. Correct the Worker Location (if applicable)

No further action is necessary if all employees in the specified supervisory organization are allocated to the correct Worker Location.

However, if employees have been identified with incorrect Worker Locations, the HR administrator has two options to correct the information.

1. **Update location Individually** – This option can be used if only a few employees have incorrect Worker Locations. This process allows HR administrators to change individual employees' worker locations via 'Change Job – Change Location/Job Title' BP. To make the corrections, please follow the instruction Change Job: Change Location / Job Title in the Workday Knowledge Base.
2. **Mass Update through the Integrated Service Centre** – This option is available to HR administrator if there is a larger number of employees with incorrect Worker Locations (i.e. entire teams, etc.). To use this approach, please follow the steps below:

Step 1: Populate the Spreadsheet Template

Access the template HERE (using your CWL). **Please download and save the spreadsheet onto your computer before entering data, as other people will access the same template.** Once you downloaded the spreadsheet, populate the template in Tab 1. You can find examples and additional instructions in Tab 2 (i.e. Example and Instructions).

For the template, we require 3 types of information: 1) Employee ID, 2) Position ID, and 3) Location Reference ID. The Location Reference ID is the building ID of the new building into which the employees will be moved (not the employee's current building ID). Please follow the steps below to find the correct Location Reference ID:

1. Find the correct 'Location Reference ID' (i.e. AAA12345)
   a. Identify the correct 'Location Reference ID':
      1. Look at an employee who is known to be in the correct Worker Location and use this Location Reference ID for those that are supposed to be in the same location, or
      2. Run the report '**Locations Primary Business Site Buildings – Distributed'** in Workday, which will provide a list of all Building locations at UBC.

Note: For easier use, the report output can be exported to Excel. Alternatively, the filter function can be used in Workday if the building name is known.

Identify the 'Location Reference ID' for the correct building and enter it in the template for the appropriate employee(s).

Note: Some employees may have more than one position that need to be correct. In this case, enter one row for each position. See Tab 2 in the template for an example.

Step 2: Send the completed template to the Integrated Service Centre (ISC) by submitting a General Workday Support request

1. Open the General Workday Support request and log in with your CWL
2. Your contact details for this ticket: Enter the required information
3. Please specify what the issue is related to: Select the category "HCM/HR" and the subcategory "Creating and Editing Positions"
4. Detailed Description: Please use the exact wording in the screenshot below. That way, the ISC Help Desk will know right away that this ticket is related to the clean-up project and will assign the right person to it.
5. Urgency: 3-Low
6. IMPORTANT: Attached the completed template via the 'Add attachments' icon at the bottom right

Detailed Description

*Please provide a short title for your request ❓ More information

This field has a character limit of 256. Please ensure your input remains within this constraint. ✕

Worker Location Correction Request

*Please provide a detailed description of your request

Hi ISC Team,

As part of the Worker Location clean-up, please see the attached list of employees that need to be corrected.

Thank you.

Step 3: ISC will upload the template to Workday

Upon receiving the request, the ISC will use the template to correct the Worker Location for the employees. Once the Worker Locations are corrected, the ticket will be updated, notifying you that everything is completed. The ticket is then marked as resolved.

Questions & Answers

1. Why is there any incorrect Worker Location information in Workday?

Some incorrect data already existed in PeopleSoft and was moved to Workday during the implementation in November 2020. Other inconsistencies occur through data entry due to the lack of knowledge and awareness that this field should be set up at the Building level.

2. Why is it important to have correct Worker Locations in Workday?

The Worker Location is used for HR purposes such as HR Reporting, Emergency Contact, and other HR matters. Additionally, the Worker Location is used for other functions, such as in Procurement, where the "Deliver To" Location is defaulted when creating a Requisition. An incorrect Worker Location has a downstream impact on other areas at the university.

3. What should I do if an employee has more than one location?

If an employee has more than one location for the same position, select the building where the employee spends the most time at as their location.

If an employee has more than one position, change the location for each position to the correct building. If you are submitting the change request to the Integrated Service Centre (ISC), enter one row for each position in the template.

4. How do I complete the template and where should I send it?

Please see step 2 in the detailed instructions above on how to populate and submit the template. The template should be sent to the ISC through the General Workday Support form.

5. When will the changes to the Worker Location take effect?
The effective date of the change to the Worker Location will be the date when the spreadsheet is uploaded by the Integrated Service Centre (ISC). The ISC is targeted to mass upload the data every two weeks on the Fridays starting November 15th.

6. Can I continue to update employee's location after the January 31, 2025 deadline?

Yes, HR administrators can always update individual employee's location via Change Job in Workday. See Change Job: Change Location / Job Title in the Workday Knowledge Base for instructions.

7. Who can we contact for any questions?

Please submit an [General Workday Support request](#) if you have questions about the process (e.g. how to complete the template, where to find the correct information, issues or questions about the Workday reports) or need technical support.

8. What else will be done to prevent incorrect Worker Location in Workday?

We hope that this clean up exercise will create awareness of the importance of correct Worker Location information when entering data into Workday. Remember, each of you plays a crucial role in maintaining the accuracy of our data. We also hope that it will serve as an educational reminder to ensure this practice is followed going forward.

Additionally, we will implement validation errors for seven Business Processes in early 2025 (i.e., Hire, Edit Position Restriction, Change Job, Edit Position, Add Job, Employment Agreement, and Job Requisition). The initiator will encounter an error message if a Worker Location is chosen that is not at the building level (i.e., floor, campus). Note: Validation errors for 'Create Position' BP will be implemented by late October 2024.

Lastly, we will have another clean-up project coming sometime next year that focuses on correcting the Worker Location on positions (frozen, open, closed, etc.). We will ask again for your invaluable help with this and will share more details next year.

Appendix #1: Screenshots of Worker Location (Building Selection vs Campus or Floor Selection)