Request Account Certification Reassigment Overview

This Quick Reference Guide (QRG) is designed to to walk an employee with an Account Certification role through the steps to request Account Certifications reassignment.   Once an Account Certification has been created and assigned to an employee, the only way for another employee to take action on that Account Certification is to request the Account Certification be reassigned. This process is meant for extended absences, change of role (assignment), or when an employee is no longer at the university. By the end of this QRG, you will be able to request Account Certification Reassignment.

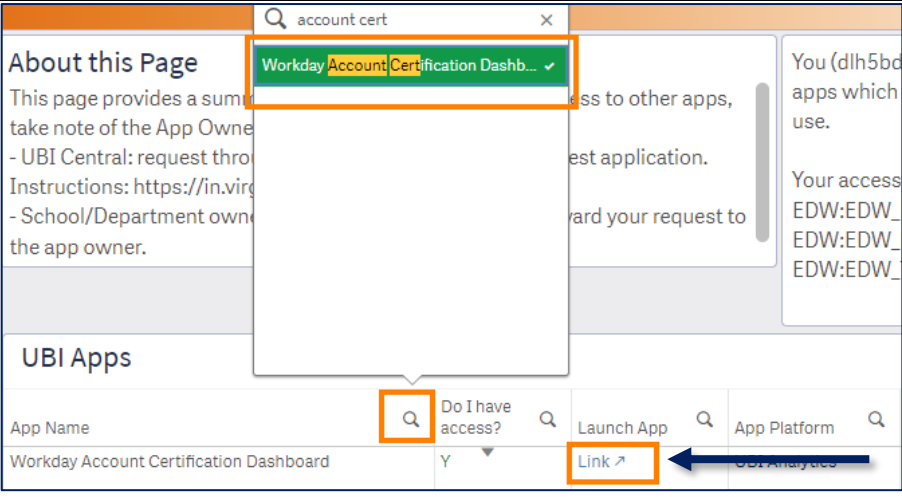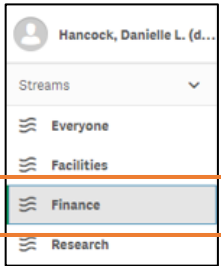|	
NOTE	Account Certification Reassignment only impacts **current** (already generated) Account Certifications. To ensure that future Account Certifications route to the appropriate individuals as Preparers/Approvers, complete a Workday System Access Request to request the appropriate Account Certification role. See list of Account Certification roles to request for Preparer/Approver.

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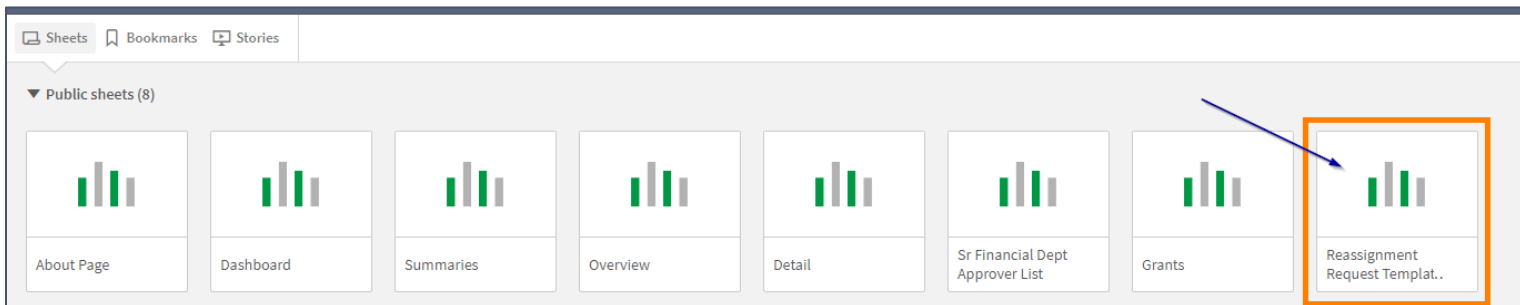## Procedure: Request Account Certification Reassignment

1. Do one of the following to gain access to UBI.

To access by the...	Do this...
UBI User Hub (centralized hub that provides access to *all* the modules you have access to regardless of platform) For more navigation tips for the UBI Portal, See UBI Portal QRG.	• Go to this link: https://ubihub.admin.virginia.edu/ *If link doesn't work – copy & paste into browser. • Search for "Account Cert" in the **App Name** field. • Select **Workday Account Certification Dashboard** • In the Launch App Column, click the link to open the app.

To access by the...	Do this...
UBI Analytics Hub (provides access to the streams and apps you have access to on the UBI Analytics platform)	• Go to: https://qsenseprod.admin.virginia.edu/hub/ *If link doesn't work – copy & paste into browser. • Select **Finance** under *Streams*. • Click the **Workday Account Certification** thumbnail (top part).

2. Select the <u>top</u> of the **Reassignment Request Template** sheet thumbnail.

3. Select filters to narrow down the Account Certifications that need reassigned.
   - You can select from:
     - Cost Center
     - Gift/Grant/Designated/Project
     - Grant PI
     - Approver/Preparer
     - Next Step Waiting On
   - Select the green check mark with each selection.

> **NOTE**
>
> **Period/Fiscal Year** can be selected to reassign specific Account Certifications. To get a full list of Account Certifications assigned to a specific Preparer, Approver, Cost Center, etc., it would be best to leave these filters blank to ensure all Account Certifications are captured.

4. Select **Status** – select **In Progress** and **Amendment in Process** (if applicable).

NOTE	Do not select **Certified** as a **Status** because Account Certifications with that status have been completed and do not need to be reassigned. If **Amendment in Progress** is gray, that means that none of the Account Certifications that pulled back based on the filter selections have that status. You can select **In Progress** only.

5. Review your filters and the Account Certifications listed in the **Account Cert – Details** table on the right side of the screen to ensure all Account Certifications that need reassigned are listed.
6. Right-Click in the **Account Cert – Details** table.
7. Select **Download As…**

8. Select **Data**

9. Select **Export**.
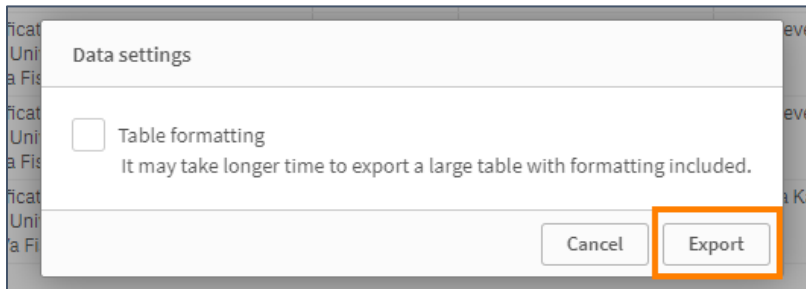
10. Select **Click here to download your data file.**

11. Find and Open the Excel file that was downloaded.
12. Select **Enable Editing** once it is available. It can take a minute for this option to be available.
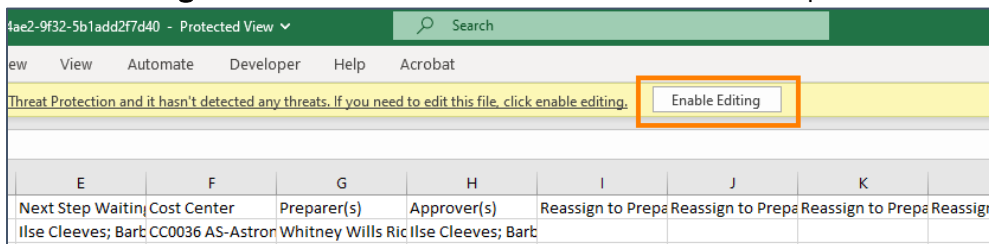
13. Select the top left corner square to highlight the entire Excel worksheet.
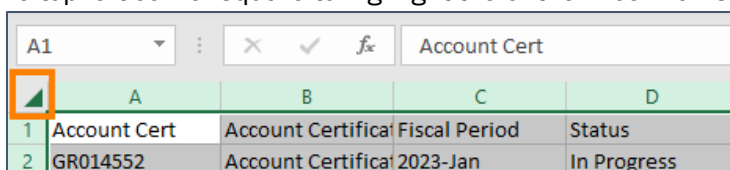
14. Double click on one of the column header lines (gray, faint line between two columns) to see the full column headers.

15. Scroll to the right where the unfilled columns are located.
16. Fill out appropriate columns to move Account Certifications:
    - Fill out columns I-K with the information of the new Preparer, if applicable.
    - Fill out columns L-N with the information of the new Approver, if applicable.

NOTE	Fill out only the columns for role(s) that need changed. • If reassigning the Preparer, only fill out columns I-K and leave L-N blank. • If reassigning the Approver, only fill out columns L-N and leave rows I-K blank. • If reassigning both Preparer and Approver, fill out all 6 columns, I-N.

NOTE	To find the information needed to fill out the columns, see the Find Employee Name, Position ID, and Cost Center section of the QRG. If requesting the same person be assigned to multiple Account Certifications, see the Excel Tips for copying data

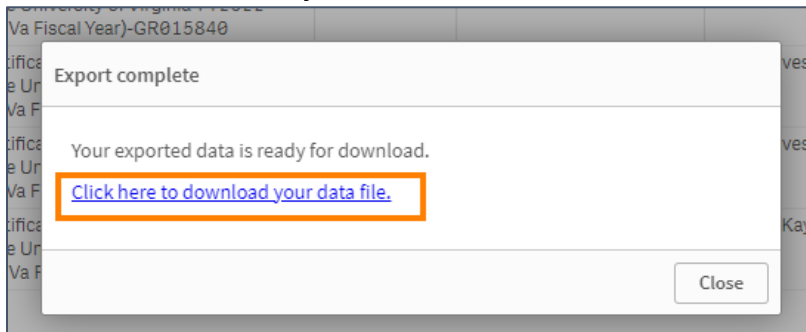| H	I	J	K	L	M	N
Approver(s)	Reassign to Preparer Name	Reassign to Preparer Worker ID	Reassign to Preparer Position ID	Reassign to Approver Name	Reassign to Approver Worker ID	Reassign to Approver Position ID
Ilse Cleeves; Barbara Kay Johnson	Zach Lee	600183807	P502370			
Ilse Cleeves; Barbara Kay Johnson	Zach Lee	600183807	P502370			
Ilse Cleeves; Barbara Kay Johnson	Zach Lee	600183807	P502370			
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Ilse Cleeves; Barbara Kay Johnson	Zach Lee	600183807	P502370			
Barbara Kay Johnson	Zach Lee	600183807	P502370			

17. Save the Excel Workbook.
18. Send an email to AskFinance@virginia.edu.
    - Type the Subject line: Reassign account certifications - WD support queue
    - Attach the Excel Workbook
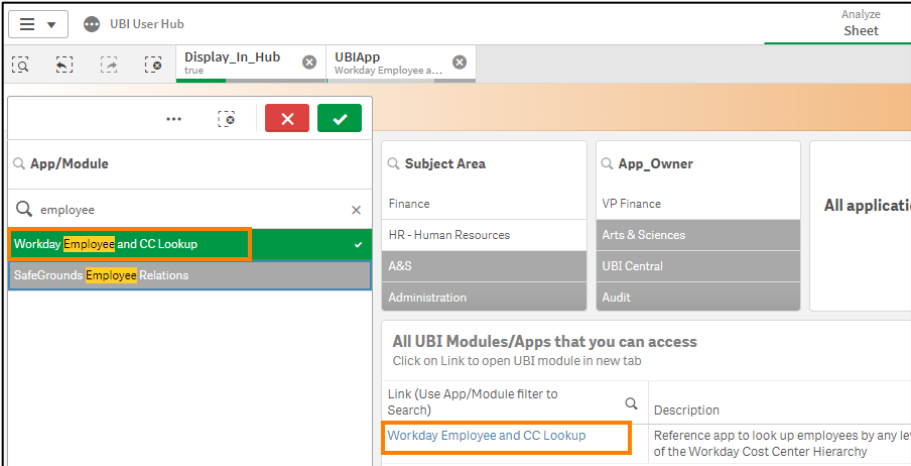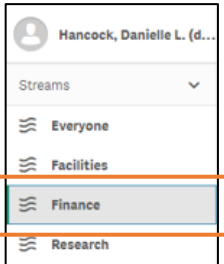
CAUTION	This procedure will only move the Account Certifications that have already been created. This will NOT assign the Account Certification role for future months. You must complete a Workday System Access Request to ensure Account Certifications will be sent to the appropriate person in the future.

Procedure: Find Employee Name, Position ID, and Cost Center

1. Do one of the following to gain access to UBI.

To access by the...	Do this...
UBI User Hub (centralized hub that provides access to *all* the modules you have access to regardless of platform)	• Go to this link: https://ubihub.admin.virginia.edu/ *If link doesn't work – copy & paste into browser. • Search for "employee" in the **App/Module** field. • Select **Workday Employee and CC Lookup** • Select the **Workday Employee and CC Lookup** link under *Link*.
UBI Analytics Hub (provides access to the streams and apps you have access to on the UBI Analytics platform)	• Go to: https://qsenseprod.admin.virginia.edu/hub/ *If link doesn't work – copy & paste into browser. • Select **Finance** under *Streams*. • Click the **Workday Employee and CC Lookup** thumbnail (top part).

2. Select the <u>top</u> of the **Employee List** sheet thumbnail.
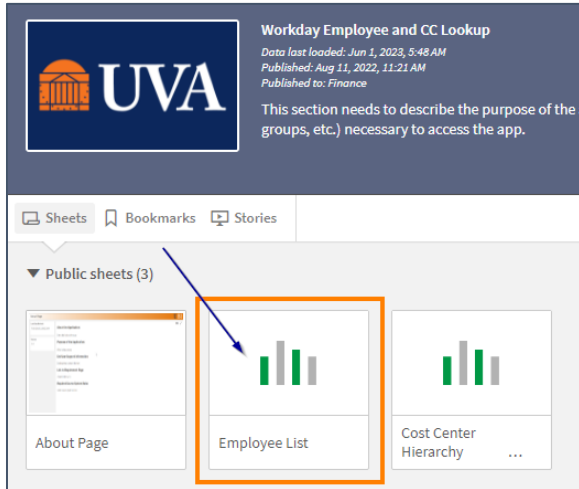
3. Select the magnifying glass in column header.
4. Type the information.
5. Select the appropriate option.
6. Select the green check mark.
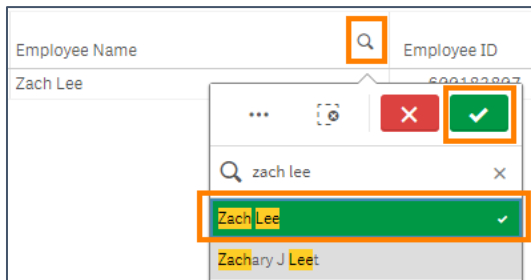
7. Repeat filtering as many columns as necessary to find the employee.
   - Select as many as needed such as:
     - Primary VP/MBU Level
     - Cost Center
     - Active
     - Computing ID
     - Last Name
     - First Name

Once the employee information is found:

8. Right-Click in the cell that has the information needed. Select **Copy Cell Value**. Do this in each of the following columns:
   - Employee Name
   - Employee ID
   - Primary Position ID

9. Paste the information into the appropriate column in the Excel Workbook created in Request Account Certification Reassignment procedure.

- For Preparer reassignment paste into Columns I-K
- For Approver reassignment paste into Columns L-N

				Local	Analyze Sheet ∨	Narrate Storytelling

Employee List

Active	Employee Name	Employee ID	Comp... ID	Primary Position ID	Job Title
Y	Rohan Parikh	163906186	rp2qn	P508162	Temp C
Y	Donna C Harris	464352799	dch	P500183	Temp C
Y	Caitlin Jack	154972412	uvt9vy	P501974	Temp D
Y	Susan Camille Pyzynski	538391688	jbh6hg	P501494	Temp G
Y	Emily Ann Parnell	255947874	eap2wq	P503005	Summer Enrichment Program Ir
Y	Cheryl Adams	129399514	cwa3f	P466598	Medical Education Programs Ad MEP48
Y	Deborah S Barry	683945927	dsb9u	P140460	Associate Professor of Medicine
Y	Catherine P Bowers	761620569	clp7a	P151536	Medical Education Programs Ad MEP48

> **NOTE**
> If requesting the same person be assigned to multiple Account Certifications, see the Excel Tips for copying data below.

Excel Tips: Copying Data into Different Cells

If requesting the same person be assigned to multiple Account Certifications, copy the information from the **Workday Employee and CC Lookup UBI module** in the first row & use this tip to copy the information down to all applicable Account Certifications.

With the Employee Name, Employee ID, and Primary Position already copied into the Excel workbook (see Find Employee Name, Position ID, and Cost Center procedure):

	F	G	H	I	J	K	L	M	N
1	Center	Preparer(s)	Approver(s)	Reassign to Preparer Name	Reassign to Preparer Worker ID	Reassign to Preparer Position ID	Reassign to Approver Name	Reassign to Approver Worker ID	Reassign to Approver Position ID
2	36 AS-Astronomy (ASTR)	Whitney Wills Richardson	Ilse Cleeves; Barbara Kay Johnson	Zach Lee	600183807	P502370			
3	36 AS-Astronomy (ASTR)	Whitney Wills Richardson	Ilse Cleeves; Barbara Kay Johnson						
4	36 AS-Astronomy (ASTR)	Whitney Wills Richardson	Ilse Cleeves; Barbara Kay Johnson						
5	36 AS-Astronomy (ASTR)	Whitney Wills Richardson	Ilse Cleeves; Barbara Kay Johnson						
6	36 AS-Astronomy (ASTR)	Whitney Wills Richardson	Ilse Cleeves; Barbara Kay Johnson						
7	36 AS-Astronomy (ASTR)	Whitney Wills Richardson	Barbara Kay Johnson						

1. Click in the filled cell. There should be a green box around the cell.
2. Hover over the small square in the bottom right corner of the cell. The cursor turns into a plus sign.

3. Double-Click on the small square where you see the plus sign. It should copy all the information down the column.

If the numbers of the Employee ID or Primary Position ID are listed as a series instead of copying the same number:

4. Click on the **Auto Fill Options** box in the bottom right corner of the filled columns.

5. Select Copy Cells.