Workday Transition: Changes to Common Tasks and Key Resources

Centre for Heart Lung Innovation

Key Resources

- **Online Training:** https://wpl.ubc.ca/browse/irp-training/
- **Job Aids for Specific Tasks:** https://blogs.ubc.ca/ubcworkdayjobaids/
- **Searchable Q&A:** https://blogs.ubc.ca/ubcirpqas/
- **Toolkit for Staff, Managers and Faculty*:** www.irp.ubc.ca/resources/toolkits
- **Translation Tool for Account Nomenclature*:** https://finance.ubc.ca/preparing-workday/private/peoplesoft-chartfield-workday-fdm-worktags

**You may get a Stale Request page after the initial click on these links. If this happens, copy and paste the link into your browser and consider adding as a bookmark.*

Key Support

- **UBC Integrated Support Centre (ISC):** 1-604-822-8200 or https://isc.ubc.ca/
- **Faculty of Medicine Workday Learning Rovers:** ubcenrl-ml-cep4rovers@mail.ubc.ca or View Schedule
- **UBC Workday Training Events:** View Schedule
- **Centre Support:**
  - *Finance and General:* tracy.yang@hli.ubc.ca
  - *HR:* Chris.robinson@hli.ubc.ca or Kelly.ceron@hli.ubc.ca

Key Changes for Managers and Administrators

PRIOR to November 2, 2020	AFTER November 2, 2020	Job Aid Reference
Approvals via paper forms for HR and Finance processes	Items needing approval will appear in the approver's Workday inbox. Can approve from mobile phone with Workday App.	FIN101-10 Expense Reporting: Manager/Budget Owners – Review and Approval of Expense Report HR Review and Approvals WDB006 – Workday Basics – How to Install Workday App on your Mobile Phone
Multiple signatories on accounts in case of absences or delegation of HR approvals via HRMS for away period	In Workday, you can delegate entire inbox to others or delegate a specific task to someone else for a period of time or as ongoing. Note: delegations cannot be set up through the mobile phone app.	FIN100-02 Expense Reporting: Expense Delegation and Initiating as a Delegate HR116-01 Tasks: Delegation
Qreqs and Treqs for expense reimbursements	Delegation can be set up to direct any expense claims to Finance. Otherwise, Workday's search bar, type "Create Expense Report" or use the	FIN101-13 Expense Reporting: Workday Mobile – Enter Expense (Quick Expense)

	expense icon on the homepage. The expense report will be routed to the Cost Centre Manager for approval.	FIN101-14 Expense Reporting: Workday Mobile – Create Expense Report FIN100-02 Expense Reporting: Expense Delegation and Initiating as a Delegate
Pcards and monthly reconciliation through Centre Suite	Existing Pcards will be converted to UBC Visa Cards and travel will be allowed on these cards if requested and approved. Reconciliation will be done in Workday by Creating an Expense Report which can now be done when a transaction has been processed rather than on a monthly basis.	FIN101-02 Expense Reporting: Create Expense Report – VISA Reconciliation
Resident or student reimbursement from a UBC account via Qreq	Only users with the Student Expense Report Initiator security role have access to Create Expense Report for Non-Worker task in Workday. The same users will also have access to the UBC Student Web Form which can be used to request for the transfer of student data from SIS to Workday. If you need access and don't have it, please contact tracy.yang@hli.ubc.ca	FIN101-05 Expense Reporting: Create Expense Report – Student/Non-Worker Expense
Managing vendor information for payments in FMS Vendor Centre	Vendors will now be called Suppliers and their information will be managed in Workday.	FIN102-01 Create Supplier Accounts: View/Find Suppliers FIN102-02 Create Supplier Accounts: Internal – Create Supplier Setup
Paying an invoice without a Purchase Order by Qreq and saving paper copies for 7 years.	Invoices are to be submitted to sukh.kaur@hli.ubc.ca. Sukh will enter the invoices in Workday and route it for approval. Invoices must comply with standards including name and department. Paper back-up are no longer required.	Invoice Receipt and Triage Invoice Standards
Purchasing **supplies** less than $3,500 – various ways	In Workday, specifically for supplies *as opposed to other goods and services*, the supplier account is already set up for specific Suppliers (Staples, Fisher Scientific, etc) in a	FIN102-13 Create Purchase Requisition: Submit Purchase Requisition – Catalogue Info on Catalogues

	"Catalogue". The Supplier submits an invoice to Accounts Payable (**ubc.invoices@ubc.ca)** with your contact information. To purchase from non-Catalogue Suppliers, you follow other payment methods (PO, Visa card, request invoice, personal reimbursement)	FIN102-14 Create Purchase Requisition: Submit Purchase Requisition – Non-Catalogue
Purchases greater than $3,500 – SharePoint form PO request process	Please direct PO request to sukh.kaur@hli.ubc.ca. Sukh will create a purchase requisition in Workday and that will initiate the process for a purchase order to be created.	FIN102-17 Create Purchase Requisition: Request for Quote Process
JVs to transfer internal funds from one account into another	A request is submitted by Sukh through a SharePoint site. A FOM financial specialist will enter the information info Workday and route it for approvals.	Journal Voucher Request Site *Live Nov 2*
Create an invoice through the Invoice Request excel form and emailing to Accounts Receivable	Only users with the Department Billing Requestor security role have access to Create Customer Invoice in Workday. Once the request has been submitted, it routes to Accounts Receivable to review and send an invoice to the customer. This is an internal financial process. Please contact Tracy.yang@hli.ubc.ca if you have an request	FIN107-07 Customer Invoice: Create Customer Invoice
Professional development expenses through paper claims process	In Workday's search bar, type "Create Expense Report" or use the expense icon on the homepage. Or the task can be delegated to sukh.kaur@hli.ubc.ca with appropriate information provided	FIN101-06 Expense Reporting: Create Expense Report – Professional Development (PD Fund)
Personal information updates, viewing benefits and compensation history, accessing T4 via Self-Service Portal	In Workday, employees can now update personal information, make changes to benefits, and access employment records.	Onboarding Benefits
Staff absences in PAT or excel tracker	In Workday, vacation, medical leave, and sick leave will be requested by the employee and	HR110-01 Absence: Request Time Off

	the manager is notified via Outlook to log into Workday and approve it. Managers can also enter their staff's absences.	Managing Team Absences Demo Video
Approving hourly employees hours on a paper form	In Workday, employees enter their hours and managers will get a notification via Outlook to log into Workday and approve it.	HR111-05 Time Tracking: Time Entry Approval HR111-02 Time Tracking: Enter Time (Hourly Staff) HR111-03 Time Tracking: Managers Entering Time
Reports via FMS nQuery or HRMS Reports	In Workday, type in the name of the report in the search bar. There is also a grants dashboard.	List of Common Reports in Workday HR114-01 Reporting: Reporting Basics HR114-02 Reporting: Advanced Reporting FIN103-04 Research Grants Dashboard: Generate and View Forms
Employee onboarding (tax forms, workplace learning, offer letter) via email and paper	For staff and students, the agreement (offer letter and reappointment) will be generated in Workday and the employee needs to login and accept the terms and conditions in Workday. General onboarding such as required UBC courses and the completion of tax forms will be done in Workday. For faculty, including research associates and fellows offer letters will continue to be done outside of Workday and the agreement will be uploaded to Workday by HR.	HR112-02 Workplace Learning: Required UBC courses HR106-06 Provincial Tax Elections HR106-07 Federal Tax Elections HR107-03 Benefits: Enroll in Benefits and Pension (New Hire)