Key Workday Information and Dates

September 4, 2020

Workday, which replaces HRMS and FMS, goes live November 2, 2020. PeopleSoft will no longer be available after this date.

This note summarizes key resources, changes and finance timelines to assist you with the transition to Workday. **Note: there will be further deadlines for appointments, reappointments, and earning distribution changes.**

Training

If you are a staff member who has grant PG signing authority, you should have been invited by IRP to training called "Workday Budget Owner" if not please contact your Director of Administration.

If you are a PI with support staff you should take the 'self-serve' training outlined below. Faculty members will also receive an email offering the opportunity to receive in-person training; faculty who do not have support staff may wish to sign up for this additional training.

All staff and faculty should take:

- Workday Basics: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-wdb

All faculty and staff who manage people should take:

- Workday for Managers: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-wdm

All faculty and staff who need to:

- Submit an expense claim should take Workday Finance 101: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-fin101

- Reconcile credit card expenses, foreign currency expenses, international travel, per diems, and delegating expense reports should take Workday Finance 201: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-fin201

- Order supplies should take Workday Finance 301: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-fin301

Quick Reference Guides / Job Aids

This link to quick reference guides (aka job aids) has instructions on how to complete specific functions in Workday. It will be helpful before and after go-live. https://blogs.ubc.ca/ubcworkdayjobaids/

Key Deadlines in Preparation for Workday

(HR Deadlines will be sent under separate cover)

Finance Deadlines

These dates are subject to change. Please check back to this website periodically.
https://irp.ubc.ca/resources/preparing

October 9

- Deadline to submit
  - E-procurement requests for PO/Change Orders
  - PO invoices
  - Vendor creation/changes
  - New research PG creation

October 14

- Deadline to submit manual travel/entertainment expense claims, non-PO invoices (T/Q req), and manual JVs

October 16

- Deadline to submit OPT expense claims, and payments received for grants to research finance

October 22

- Deadline to approve OPT expense claims and non-PO invoices

October 23

- Deadline to submit cash or cheque deposits for processing

Key Changes

- Nomenclature for key items like PGs and Dept IDs will change. See the enclosed slide regarding new names for items.

- Chartfield numbers for all PGs other than research grants will change. You can find your new worktag number = PG number here:
  https://finance.ubc.ca/peoplesoft-chartfield-workday-fdm-worktags

- Requests for your approval of HR and financial transactions will be in your Workday inbox, not in your Outlook email inbox. You can configure your Workday settings to receive an email in your UBC email Outlook inbox when something comes into your Workday inbox. If you use a non-UBC email account, you will have to set up forwarding from your UBC account. (More details will follow on this)

- You can delegate a task (e.g., approve a specific employee expense) or a function (e.g., all employee expenses) or the entire contents of your Workday inbox.

- Credit card expenses will be reconciled within Workday.

- The concept of “PG signing authorities” does not exist within Workday. If there are multiple “Grant Managers”, every Grant Manager will get the same notice to approve an HR or Finance transaction. Once we go live you may want to add or delete Grant Managers in order to meet your lab’s needs.

- BCCA Faculty**: do not** delete your Fin Admin’s as grant managers.

- After go live you can assign the Grant Financial Analyst role to support staff. This role will allow the individual to see the budget and actual expenses but not the payroll details. This is a view only role and does not allow approval.

- Hourly employees: hours are tracked within Workday. PIs or timekeepers need to approve the hours every two weeks for the employee to be paid. Hourly employees will be paid on the 15th and last day of the month. Approval of hours will be one week before the pay period.