Contents
Supervisory Organization and Security Role Mapping Data Validation ................................................................. 2
How to Prepare ......................................................................................................................................................... 2
Contact ................................................................................................................................................................. 2
Tasks to Complete ................................................................................................................................................ 3
What’s new in the Sup Org Tool? .......................................................................................................................... 3
Requesting New Sup Orgs .................................................................................................................................. 4
Contingent Workers ........................................................................................................................................... 4
Creating a Contingent Worker Through Early ID ............................................................................................... 4
Supervisory Organization Best Practices ............................................................................................................. 5
Instructions ........................................................................................................................................................... 7
FAQs ....................................................................................................................................................................... 14
Appendix ............................................................................................................................................................. 19
  Appendix 1 – Core Concepts: Supervisory Organizations and Security Roles in Workday ............................... 19
  Appendix 2 – HCM (Human Capital Management) Security Roles in Workday ............................................. 23
  Appendix 3: Using the Senior HR & FR Partner Security Roles ...................................................................... 25
  Appendix 4 – Inactive Positions in Position Management ............................................................................... 27
  Appendix 6 – Inherited Supervisory Organizations ......................................................................................... 27
  Appendix 7 – Highlevel Departmental Workflow ............................................................................................. 27
Supervisory Organization and Security Role Mapping Data Validation

The HR workstream of the IRP has continued to build UBC Supervisory Organizations (Sup Orgs) and assign HCM Security Roles in our Workday tenant using data from the validation activities completed by the UBC HR community in early 2020. The team is now building upon this data and working with the HR community once again to review and validate the Sup Orgs and Security Roles.

This document provides information the community will need to validate the Supervisory Organization data and to map Security Roles in preparation for the September 24 and October 28 deadlines.

How to Prepare

**Step #1:** Register and attend one Sup Org and Security Role Mapping Call-Ins August 5-10. Use the links below to register if you have not already done so:

<table>
<thead>
<tr>
<th>Session Date</th>
<th>Session Registration Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, August 5 – 10:00 – 11:00 am</td>
<td>IRP HCM - SupOrg Call-in #1</td>
</tr>
<tr>
<td>Thursday, August 6 – 10:00 – 11:00 am</td>
<td>IRP HCM - SupOrg Call-in #2</td>
</tr>
<tr>
<td>Monday, August 10 – 2:00 – 3:00 pm</td>
<td>IRP HCM - SupOrg Call-in #3</td>
</tr>
</tbody>
</table>

**Step #2:** Confirm you have the correct HRMS access to use Position Management. If you do not have access, please request access using this form: [http://www.hr.ubc.ca/information-systems/files/hrms_access_request_form.doc](http://www.hr.ubc.ca/information-systems/files/hrms_access_request_form.doc) and indicate ‘Sup Org Tool’ in the comments section.

**Step #3:** Once you are ready to review your Sup Org data, use the detailed instructions (including screenshots) below to complete your data validation and/or edits using the HRMS tool. For an overview of key concepts in Workday, please see Appendix 1.

Contact

For questions about this material or the data validation/mapping work overall please email irpsupport.hcm@ubc.ca
Tasks to Complete
Please review and/or update the information relating to your Sup Orgs and Security Role Mapping as follows and by midnight, September 24, 2020.

<table>
<thead>
<tr>
<th>Task</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Review &amp; Update HR Security Roles</strong></td>
<td>Review security roles assigned to employees in each of your Sup Orgs and make changes in the tool as required based on recent learnings from business process reviews and Train the Trainer courses.</td>
</tr>
</tbody>
</table>
| 2. **Review & Update Employee Sup Org Assignments** | Reassign existing employees as necessary  
For new employees – ensure each is assigned to the correct Sup Org, with the correct Manager and has the appropriate HR security role(s) |
| 3. **Review Vacant Positions & Assign to the Appropriate Sup Org** | All vacant positions will appear in the Sup Org Tool  
**Note:** Only positions that are assigned to Sup Orgs will be moved into Workday for November |
| 4. **Request New Sup Orgs (If Required)** | There is a new process for requesting changes to the structure of your Sup Orgs before go live. Requests for structural changes will now be done on a case by case basis and will require the ‘New Supervisory Organization’ form to be completed to initiate a request. Requests for changes will be accepted until August 23.  
New Sup Orgs are expected to be ready for your review on September 9 at which time you will be able to review the Sup Org and add employees. |
| 5. **Review & Add Contingent Worker Data** | Review each of your Sup Orgs to confirm all of your contingent workers are included, they are assigned to the correct Sup Orgs, and have the correct security roles. |

You will use HRMS to complete the tasks using the instructions below.

**What’s new in the Sup Org Tool?**
In this last round of validation, the HCM team has made minor changes to the Sup Org Tool. These include;

1) **Deleting Sup Orgs**
   You cannot remove a Sup Org from your view. This is to ensure Sup Orgs are not deleted. If you no longer need a Sup Org, please;  
   a. Reassign the employees to other Sup Orgs as appropriate;  
   b. Email [irpsupport.hcm@ubc.ca](mailto:irpsupport.hcm@ubc.ca) with the Sup Org Number and we will remove the Sup Org for you

2) **Secondments and Temp Promotions**
If an employee is on a **Secondment** or **Temp Promotion**, their temporary and ongoing positions will appear in the Sup Org tool and both will need to be assigned to the appropriate Sup Org.
   - Example: Those who are seconded to the IRP will be in an IRP Sup Org (temporary position) as well as a Sup Org within their home department (ongoing position)
Requesting New Sup Orgs

You will not be able to create new Sup Orgs directly in the HRMS Tool. If you require a new Sup Org to be created, this must be requested using the ‘Supervisory Organization for Workday’ Request Form. All requests must be received by the IRP team by August 23rd. The link to the request form is [http://www.hr.ubc.ca/wp-content/uploads/Supervisory-Org-Request.pdf](http://www.hr.ubc.ca/wp-content/uploads/Supervisory-Org-Request.pdf)

- Requests for changing the structure of any Sup Org(s) will be done on a case-by-case basis & require a completed form
- A ‘Manager’ Position in HRMS must exist and be included in this form for us to create a new Sup Org. The Manager Position must also be assigned to a Sup Org as an employee (ie their Manager’s Sup Org)
- New Sup Orgs will take about one week to create in HRMS and are all expected to be available in the Sup Org tool by Sept. 9

Contingent Workers

A contingent worker is a Non-UBC Employee who manages UBC funds and needs access to Workday to do so.

In current state, this could refer to:

- **Contractors**: Workers under contract who are not employees but have budget or people responsibilities and therefore need Workday Access
- **Non-Employee/Non-Contractors**: Workers performing transactions on behalf of UBC (e.g. individuals working for Health Authorities who help researchers with their administration of grants, individuals from the granting agencies that need access to grant information, Clinical Trial Research Offices, etc.)

**Workday Access**

In order for Contingent Workers to have access to Workday, they must:

- have an Early ID Assignment in HRMS and
- be assigned to a Sup Org within the HRMS Tool
- The IRP Finance team has been working with the community to identify some current Contingent Workers. These Contingent Workers have been added to the Sup Org Tool and you can assign them to the appropriate Sup Org.

**Finance/HR Security Roles**

- Contingent Workers may also require Finance and/or HR Security roles. While Contingent Workers cannot have the Manager Security role in Workday, if they are responsible for initiating or approving HCM Business Processes, they can be assigned HR Analyst, HR Partner or Timekeeper.
- The Finance Team will continue to work with the community to identify appropriate Finance Security roles for Contingent Workers.

Creating a Contingent Worker Through Early ID

To create a Contingent Worker in Workday, follow the below steps.-In HRMS, Under ‘Workforce Admin’, select ‘Early ID Assignment’. Leave the SIN blank and click ‘search’

1) Enter Birthdate, if known. If unknown, enter 01/01/1901 and click ‘search’
2) Scroll to the bottom of the screen and click on “Add New Employee ID”
3) Enter the contingent worker name, 999 999 999 for SIN and click on “Position is unpaid”
4) Fill in the rest of the info: Select NON for the employment group, OTHER for job family (only choice), and 800001 for the Title (only choice)
5) Click **Save** and receive an employee ID on the next screen
6) The emplid will be properly assigned and available in the HRMS tool to assign to Sup Orgs

Assign an employee ID to your new hire by filling in the boxes below and clicking on the 'Save' button. Your new employee ID will appear on the next screen. If you are unable to find an exact job title match, select the closest match. The correct job title will be assigned upon data entry of the appointment form.

```
Last name: Smith, John  e.g. Smith, John
First name: 
SIN: 999999999
Date of Birth: 1962/06/01
Position is unpaid: 
Campus: VCVR
VP/Faculty: MEDF
Department: SURG
Empl Grp: NON
Job Family: OTHER
Title: 800001
Email Address: aaa@bbb.ca
```

Supervisory Organization Best Practices
Throughout the last year the IRP HR team has been learning alongside our community about the UBC best practices to create streamlined workflows through our Sup Org & Security Role validation activities.

One Supervisory Organization per Manager
- We strongly recommend **creating one Sup Org per Manager, as opposed to creating multiple Sup Orgs for each functional area** (i.e. accounting, health and safety, administration) if the individuals all report to one Manager. One Sup Org will allow Manager’s to capture data for all the employees that report to them
- Supervisory Organizations ensures the Business Processes flow through a Management Hierarchy. Having **multiple Sup Orgs makes it more difficult to maintain** and does not enhance overall Workday functionality
- ‘Reporting’ within the Sup Org Structure limits the view to one Sup Org at a time in many reports. Having **multiple Sup Orgs negatively impacts the Manager’s ability to accurately compare and view all employees they manage**
- Through ‘Reporting’ in Workday, Managers can filter/group employee information within their Sup Org to **allow for a more granular view of their team and functional areas** based on FTE, Job Profile, Location, etc.
Naming Conventions

A supervisory organization will adopt the format below in its naming convention. Use of the "|" (pipe) symbol is permissible to separate the function name from the department name(s). Full names/words should be used, as opposed to abbreviations or symbols.

For Vancouver, the structure will be as follows:
Supervisory Organization Name | Manager’s position functional organization unit name | roll-up hierarchy for parent functional organizational units

For example:
Facilities and Technical Management | Department of Computer Science | Faculty of Science Research Assistants | Department of Mathematics | Faculty of Science

For Okanagan, the structure will be as follows:
UBCO | Supervisory Organization Name | Manager’s position functional organization unit name | roll-up hierarchy for parent functional organizational units

For example:
UBCO | Research Support | Department of Creative Studies | Faculty of Creative and Critical Studies

Use the Workday Delegations function to delegate approval authority

- Use the Workday Delegations function to delegate initiation or approval authority

- HCM security roles should not be assigned to individuals on Sup Orgs as a substitute for delegations

- Only individuals that are the Managers, or responsible for the initiation or approval of HCM Business Processes should be assigned HCM Security Roles on the Sup Orgs.

- Delegations allow another user to complete specified tasks on your behalf for a temporary or ongoing period of time

- You may delegate selected tasks in your Workday inbox, or specific tasks (initiate, review, and approve) within a business process
Instructions

Accessing the HRMS Tool

1. Login to HRMS through the link: [http://msp.ubc.ca](http://msp.ubc.ca)
2. Click on HRMS Live
3. Click on Position Management on the left hand navigation, then Manage Sup Orgs [1]
4. To view organizations associated to your department, search for your department by Department ID [2] or by Department Name [3] by choosing a filter method (e.g. contains) and enter the search string (e.g. arts).
   * You can also search for all departments by faculty by searching using the ‘Faculty’ fields.
5. Click on Search
Creating and Maintaining Organizations

The Organization View

- The **Maintain Sup Orgs** tab [1] is shown after selecting the department in the search page.
- The Header is where the Department and Faculty information [2] is shown.
- On the right side of the Header, the counts for the Department is shown [3]
  - Orgs – shows the number of organizations that is included in the view for the department
  
  *Note that this may include organizations that you did not create nor maintain*
- Empls – shows the total number of employees in the department
- Unass – shows the number of employees that have not been assigned to an organization

- **Organization Name** – there is where you enter update the name of the organization
- **Manager and Title** – this shows the manager of the organization based on the role assignment. The superior organization will be the organization the Manager is a member of.
- **Roles** – these are the assigned security roles for the organization; inherited roles are preceded by “[i] ...”
- **Employees** – this is the list of employees in the organization; the dept. they are currently in is also shown
- **Subordinate Organizations** – this is a horizontal tree structure of the organizations beneath up to 3 levels deep.

*Note - Sup Org IDs are required to be 5 digits and now start with a 1. For example: First Yr Programs was previously was ‘0001’, it will now be ‘10001’.

### Adding an Organization to your Department’s View

1. To add an existing organization to your department’s view, click on the [+] icon [1].
2. Enter the Organization ID [2].
3. If you do not remember the ID, you can search for it by click on the magnifying glass [2].
   * This will return all organizations that have been created. Use the search filter to find the right organization.
4. Click on Save.
5. After the ‘save’, the Roles and Employees grid will be populated.
Assigning Employees to Organizations

1. Click on the Assign Empl Orgs tab [1].
   This shows all the employees in your department and the organizations they are assigned to [2].
2. Employees that are not assigned to an org will have the Organization ID of ‘0’.
   * You may also change the assignment of employees already assigned to existing organizations
4. Click Save.
Adding a Matrix or Dotted Line Manager

1. Click on the Add Matrix Manager tab [1].
   This shows all the employees in your department and the matrix manager (if applicable) [2].

2. You add a matrix manager by entering their Position number [2].
   If you do not know the Position number, click on the magnifying glass to pull up a list of positions.
   * Note that all active (including vacant) positions will be shown; use the search filters to narrow this down.
   - If the Matrix Position’s Name and Business Title [3] is blank, this means that the position is currently vacant.
   - If the employee has multiple matrix managers, please contact us and we will collect this data separately.

3. Click Save.
Assigning Security Roles to an Organization

1. Click on the Assign Secu Roles tab [1].
   This shows the employee positions, the security role, and for which organizations they are assigned to.

2. Org ID [2] – this is the organization where the position having the role is assigned to.
   If you do not remember the ID, you can search for it by click on the magnifying glass.
   * Note that only organizations in your view will be shown to limit the selection results.
   You will need to first add organizations to your department view in order to select them (next section).

3. Role Assignment [3] – this is the Workday security role that can be assigned to a position. Please see the Appendix for a description of the roles and responsibilities.

4. Position [4] – the security roles are set by position number. Click on the magnifying glass to show the positions.
   * Note that only positions in your department are allowed to be set here. To assign a position that belongs to a different department, navigate to the other department in the main search page.

5. To add new roles click on the [+] icon. To remove roles, click on the [-] icon. [5].

6. To update Position, Role Assignment, and/or Org ID you can simply change the values.

7. Click Save.
Program to Update Data in the Supervisory Org Tool (runs nightly)

Please note that on a nightly basis the HRMS tool will routinely update employee data as follows:

- Updates the list of workers in the 2\textsuperscript{nd} tab (Assign Empl Orgs).
  - Employees who are no longer in your department are removed from this list.
  - Employees who have been newly hired to your department are added to this list with an Org ID = 0 (unassigned).
- Updates the names and business titles of managers in the 3\textsuperscript{rd} (Add Matrix Manager) and 4\textsuperscript{th} tab (Assign Secu Roles)
  - This fills in the name and business title of the current incumbent in the Position as this can change. If the position is empty the name will show as ‘Vacant’; if the position is no longer active it will show ‘Inactive’
- Highlights any employees that may have a matrix relationship (3\textsuperscript{rd} tab - Add Matrix Manager)
  - If an employee has a joint appointment in another department, the Type column will show as ‘J’.
1) **Q: Are there standard naming conventions that I should follow?**
   A: Yes. Standard naming conventions have been set out as follows:
   - Use full names, including Department, Institute, School, Division
   - Sup Org names longer than 27 characters will only be fully visible if a user ‘hovers’ their mouse over the name, however your Sup Org name can up to 125 characters
   - Symbols are acceptable in Sup Org names only if they are part of the true name of the department. For example entrepreneurship@ubc
   - Use the ‘Pipe’ | symbol to separate the function name from the department name
   - **For Vancouver**, the structure will be as follows:
     Supervisory Organization Name | Manager’s position functional organization unit name | roll-up hierarchy for parent functional organizational units
   - **For Okanagan**, the structure will be as follows:
     UBCO | Supervisory Organization Name | Manager’s position functional organization unit name | roll-up hierarchy for parent functional organizational units
   - Keep in mind that your Sup Org name may be used on other documents such as offer letters

2) **Q: Can I have multiple Sup Orgs with the same name?**
   A: No. All Sup Org names must be unique. However, you may add a number sequence to the Sup Orgs to make them unique, if there are no other identifying factors. For example, Accounting Support 1 | Department of Psychology (Manager A) and Accounting Support 2 | Department of Psychology (Manager B).

3) **Q: Can I move employees from one Sup Org into another Sup Org?**
   A: Yes. If the employee is in the incorrect Sup Org, you can go into the ‘Assign Worker Org’ tab and update the Org ID number to the appropriate Sup Org. Once you click ‘Done’ and save the work, this will automatically update the employee’s Sup Org.

4) **Q: Can we delegate tasks to someone other than the manager?**
   A: Yes, tasks can be delegated within Workday. For the purposes of Sup Org Validation, we ask that you create the Sup Orgs and assign the Manager as per Workdays definition of Manager, as opposed to who will be carrying out administrative tasks. This will ensure the workflow processes are accurate going forward.

5) **Q: How do we handle employees who report to multiple managers?**
   A: This can be managed through a Matrix Organization. A Matrix Organization is a type of Supervisory Organization used to group worker(s) who report to more than one Manager. These can be created in situations when an employee has two Managers who they report to; for example - one related to their functional department (e.g. dean’s office, Faculty of Arts) and also reports to another manager related to their role (e.g. central Human Resources). A Matrix Org will allow both Managers to initiate, and/or approve, and/or view employee information (vacation and sick balance, hours worked, etc.) and job changes (salary increase, FTE changes, etc.).
Please note, for the purpose of the Supervisory Organization validation, we will not be setting up Matrix Orgs or multiple managers at this time. There will be time in the coming months to do so. For now, we are only validating the structure itself.

6) Q: How do we handle multiple managers managing one Sup Org?
A: In Workday, there will no longer be pooled positions. Each manager, and employee, will have their own unique position number. For the purposes of validating Sup Orgs in this instance, you will notice that only one of the manager’s names appears as the manager of the Sup Org they manage if the managers are in a current pooled position. You do not need to add in the other manager’s names, however ensure the position number for the Manager(s) are correct. Once the Sup Org name and Manager position number is validated, the HCM team will be able to add in all the appropriate managers with their new unique position number.

7) Q: Who should student employees report to?
A: We recommend the Manager(s) for CUPE 2278 employees (TAs) are those faculty members who are an instructor of record for the course assigned to the specific TAs.

You will notice that the sample Sup Org name for groups of GRA/GAA/UAA have *Research| (grant/lab) | Department* as their naming convention. This is because these student roles are intended to support Research and therefore their Manager should be the PI/Person overseeing the Research. As a refresher, below are the guidelines for these students.

<table>
<thead>
<tr>
<th>Student Type</th>
<th>Typical Duties</th>
<th>When it is appropriate to hire</th>
</tr>
</thead>
</table>
| Undergraduate Academic Assistant (UAA) and Graduate Academic Assistant (GAA) | Performs work:  
• Not academic in nature  
• Not performed by a TA  
• Not directly related to students’ field of study  
E.g. Performing research for a faculty member that is not of direct benefit to student’s academic field of study. | Hire a UAA/GAA for work related to the faculty’s area of research. |
Graduate Research Assistant (GRA) conducts research integral to the student’s graduate requirements. Hire a GRA when the student’s project relates to the faculty’s research area to help subsidize their degree.

If you have UAA/GAA/GRAs in your departments who are not supporting research, please put them in their appropriate non-research related Sup Org and we will follow up with you on whether or not we need to review their student job classification.

For more information on student appointments, please visit the Hiring a Student Worker website http://www.hr.ubc.ca/administrators/student-workers/hiring-a-student-worker/.

8. **Q:** Who should Post Docs and RA’s report to?

   **A:** As the PI is the Manager of Post Docs and RAs, they should be assigned to the PI’s Sup Org. This will ensure all approvals, within Workday that require Manager approval will flow to the PI. This ensures the PI is approving Business Processes such as (but not limited to), Hires, Extensions, Job Changes, Terminations, but also Financial approvals such as Travel Reimbursements, and Expense Reimbursements which require a one-over-one supervisory approval. This also ensures the PI has insight into the employment data of their RA’s and Post Docs.

   However, to ensure the Department Head is still included in the approval process, as they are required to be in the approval process per UBC Policy, we have added a new configuration to Workday to a ‘Manager’s Manager’ approval.

   This will ensure that after the PI approves within Workday, an additional approval is routed to the PI’s Manager – in most cases, the Department Head for their approval (or the Dean for those units that do not have Department Heads).

   In order for this configuration rule in Workday to work as intended, all Post Docs/RA’s need to be in the Sup Org of their PI and the PI needs to be in the Sup Org of the Head (or Dean). Sup Org Hierarchy would look like: PostDoc/RA -> PI -> Head.

9. **Q:** Will the changes made in HRMS for the data validation exercise, impact the live HRMS?

   **A:** No, any updates you make in the Manage Sup Org pages will not impact any employee information throughout the rest of HRMS. However, as new employees are hired, or current employees change jobs, the new/changed employees will appear in the Manager Sup Org pages without Sup Org information. They will appear in the holding Sup Org and this will allow you an opportunity to update their Sup Org information. Similarly, if an employee leaves the university, they will be removed from the Manage Sup Org page. The employee information will be updated in the Manage Sup Org page on a regular basis.

10. **Q:** Will the Transition Network be involved in the data validation and mapping exercises?

    **A:** Transition Network members may be involved if they support HR. Their corresponding Senior HR Director may contact them directly to help with the exercises for their department.
11. Q: I see an organization that does not belong to my department. Why is this?
   (a) In the example below, while viewing the organizations assigned to ‘Athletics and Recreation’ (ATHL) [1], the organization ‘Recruitment and Awards | International Student Initiative’ [2] was brought in because the employee was assigned to ‘Intern’ Student Initiative (ISTI)’ when the Supervisory Orgs were originally created back in Sept. 2018 or someone wished to see the workers from ISTI [3] and added an organization in ISTI under ATHL.
   
   (b) This can also happen if you added an organization by mistake to your department.

<table>
<thead>
<tr>
<th>Dept ID</th>
<th>Department Name</th>
<th>Fac/VP</th>
<th>Faculty/VP Unit Name</th>
<th>Orgs</th>
<th>Emps</th>
<th>Unass</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATHL</td>
<td>Athletics and Recreation</td>
<td>VPSS</td>
<td>VP Students</td>
<td>45</td>
<td>452</td>
<td>154</td>
</tr>
</tbody>
</table>

12. Q: Can an employee report to two Managers in Workday?
   A: Yes, this can be done through a Matrix Sup Org. However, it’s important to note that in Workday the assigned Manager(s) will have the ability to perform hiring, performance management and terminations for that employee’s position. As a result, please determine if that employee should truly report to two Managers in Workday.

13. Q: If we make changes to Sup Orgs, will this carry through when the tool runs its routine nightly updates or will we need to re-enter our changes?
   A: The nightly updates will not remove your changes and you will not need to re-enter them into the tool.
Security Roles

14. Q: Can someone have more than one Security Role?
   A: Yes, depending on your responsibilities, you can have more than one Security Role. Within the 'Manage Sup Org' tool, you will need to add a separate line for each of their security roles.

15. Q: Can a Supervisory Org have more than one person assigned to the same Security Role?
   A: Yes, however, if you have multiple people with the same Security Role within the same Sup Org, each person will be routed the approval. However, only one of them will need to approve the task. For instance, if you have two individuals with the HR Partner Security role, any time there is a BP that requires HR Partner approval for that Sup Org(s), both individuals will be routed the task to approve. Once one of them approves the task, it will disappear from the other person’s Workday inbox.

16. Q: What happens to the Security Role when a position becomes vacant?
   A: You can assign the Security Role to another employee either ongoing or in the interim as you recruit for the replacement. When the position is filled again, roles based security will be assigned to the new employee in that position. If the Security Role is unassigned, it is inherited from the superior Supervisory Organization.

17. Q: Can an HR Partner initiate and approve a new hire, or is there a segregation of duties between initiators and approvers?
   a) For staff and faculty hires, there is not the ability to self-approve (i.e. you cannot initiate and approve your own tasks). If the HR Partner initiates the process, then the Manager must approve. If the Manager initiates, the HR Partner must approve.
   b) For student hires, there is the ability for Manager/HR Partners to self-approve.

18. Q: Can someone self-approve their own tasks if they are assigned a Security Role that has both initiation and approve abilities?
   A: For certain business processes, such as an HR Partner initiating and approving a student hire as shown in question 16, you may self-approve. For select business processes, an additional approval will be required by either your Manager or the appropriate approver to ensure proper business controls are in place.

19. Q: If there is an HR Partner assigned to a higher level Sup Org, do we need to assign HR Partners to lower level Sup Orgs?
   A: The HR Partner at the higher Sup Org will be inherited by the lower level Sup Orgs that fall beneath it, and will be able to carry out the HR Partner security role tasks with those Sup Orgs (refer to Appendix 6 for a visual on inherited Sup Orgs). You can also assign HR Partners to lower level Sup Orgs to override this.

20. Q: What do we do if we have Supervisors in pooled positions?
   A: Pooled positions will not exist in Workday. The IRP HR team has separated pooled positions in HRMS into individual positions within Workday.

21. Q: Do we need to have HR Partner, SN HR Partner and SN FR Partner Security role assigned on our hierarchy?
   A: Yes, because of inheriting roles, you will need to assign the SN HR and SN FR (Faculties only) either at the Dean’s Office or Main Office Level, at the Department level, or at both the Dean’s/Main office and the Departments (refer to Appendix 3). If the HR Partner and SN HR Partner are the same person, they will need to be assigned both roles.
Appendix

Appendix 1 – Core Concepts: Supervisory Organizations and Security Roles in Workday

1.1 Supervisory Organizations

- Supervisory Organizations are the foundation of Workday HCM
- A Supervisory Organization is a logical grouping of employees who report to the same Manager
- Each Manager is associated with a Supervisory Organization that contains the workers and the positions they manage.

1.2 Definition of a Manager in Workday

- In Workday, a Manager is the person responsible for making decisions around hiring, managing and terminating employees in their Supervisory Organization.
- Unionized Supervisors are not considered to be managers in Workday based on this Workday definition.
- In some instances, the Manager is also the person responsible for financial approval.

1.3 Supervisory Organizations – UBC Example

- Supervisory Organizations may include a variety of workers who have different titles, locations, departments or cost centers. As long as all the workers report to the same Manager (e.g. the person responsible for managing their performance), they may all exist within one Supervisory Organization.

For example, a faculty member at UBC may be the Manager of a salaried staff member in Vancouver, a student worker in the Okanagan, and an hourly staff member in the Okanagan. As these employees all report to the same Manager, they would be in the same Supervisory Organization.
1.4 Supervisory Organization - Academic

- We have recommended that faculty members who are Instructors of Record, be considered the Manager of the union employee group *Teaching Assistants*.
- For other student employees, a Manager can be either a faculty member or administrative staff person.
- You can have multiple employment groups (e.g. CUPE 2950, M&P, Non-Union Technicians) within one Sup Org, as long as they all report to the same manager.

1.5 Supervisory Organization – Service Unit

- You can have multiple employment groups (e.g. CUPE 2950, M&P, Non-Union Technicians) within one Sup Org, as long as they all report to the same Manager.
1.6 Matrix Supervisory Organizations

- A **Matrix** organization is a type of Supervisory Organization used to group worker(s) who report to more than one Manager.
- These can be created in situations when an employee has two Managers who they report to, for example, one related to their functional department (e.g. Faculty of Medicine) and also reports to another Manager related to their role (e.g. Development Alumni and Engagement).
- Matrix Organizations will allow both Managers to initiate, and/or approve, and/or view employee information (vacation and sick balance, hours worked, etc.) and job changes (salary increase, FTE changes, etc.).

1.7 Workday Business Processes (BPs) and Security Roles

- Every procedure – or ‘business process’ – in Workday follows a defined workflow, with automated handoffs facilitating actions and approvals needed to complete the work.
- These business processes (BPs) are built based on **security roles**.
- You can think of security roles as a set of permissions which govern what individuals and groups can see and do in Workday, as well as what they can initiate and/or approve.
1.8 Security Roles – Types of Roles

- **Standard Workers**: Roles which apply to the majority of the worker population (e.g. Employee as self, Retiree as self)
- **Role-Based Security**: Roles that are assigned to a position. The roles stay with the position and are automatically assigned to the person occupying the position. For HCM, examples include Manager, HR Partner, HR Analyst, among others. These roles have the ability to initiate/approve business processes within their Supervisory Organizations, or Supervisory Organizations they support.
- **User-Based Security**: Roles that are assigned to a specific user. The roles are not attached to a position and must be assigned to the individual occupying the position. For HCM examples of these are assigned to an individual(s) at the central HR Level and include HR Administrator, Benefits Administrator, Compensation Administrator and Payroll Administrator, among others. These roles have the ability to make changes in the backend of the Workday system.

1.9 Role Based Security

- Access to Workday functionality is dependent on assigned security roles that pertain to specific business processes and data. **Role-based** security roles are assigned to positions.
## Appendix 2 – HCM (Human Capital Management) Security Roles in Workday

The following Workday Security Roles can be assigned by the UBC HR Community. For an example of how a workflow may occur using the following security roles, refer to Appendix 7.

<table>
<thead>
<tr>
<th>Typical UBC Position (Individuals with current HRMS access)</th>
<th>Security Role in Workday</th>
<th>Can they initiate, action, and/or review?</th>
<th>Examples of what they can do in Workday</th>
</tr>
</thead>
</table>
| Job Families within M&P                                     | HR Partner               | Initiate, Review and Approve             | • Create, review, and approve positions and job requisitions (job postings)  
• Initiate, review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees  
• Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.)  
• Act on business processes (BPs) of employees in Supervisory Organizations they support |
| UBCO Administrators                                         | HR Analyst               | Initiate Can review and/or approve some BPs, such as student hires | • View job details, compensation, time off balances, contact details  
• Initiate absence requests, compensation changes, change job (transfer, FTE, etc.), termination  
• Can ‘add approver’ to Manager or HR Partner if further review/approval is required  
• Act on BPs of employees in Supervisory Organizations they support |
| UBCV: Job Families within CUPE 2950 HR and Admin            | HR Analyst               | Initiate Can review and/or approve some BPs, such as student hires | • View job details, compensation, time off balances, contact details  
• Initiate absence requests, compensation changes, change job (transfer, FTE, etc.), termination  
• Can ‘add approver’ to Manager or HR Partner if further review/approval is required  
• Act on BPs of employees in Supervisory Organizations they support |
| UBCV: Some M&P Level A HR & Admin                           | SR HR Partner            | Approve                                  | • Secondary approver for staff and student HR business processes within their assigned Sup Org including:  
• Create position, recruitment, hire, change job, compensation changes and terminations |
| UBC Vancouver Campus – Senior HR professionals within Departments who support staff & students and Central HR Advisors/Managers who work in embedded units | SR FR Partner            | Approve                                  | • Secondary approver for faculty/academic HR business processes within their assigned Sup Org including:  
• Create position, recruitment, hire, change job, compensation changes and terminations  
• Initiate, end and update Academic Appointment |
| **Anyone who is a manager of a Sup Org will automatically get assigned the role ‘Manager’** | **Manager** | **Initiate, Review and Approve** | • Create, review, and approve positions and job requisitions (job postings)  
• Initiate, review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees  
• Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.)  
• Act on BPs of employees in Supervisory Organizations they manage |
| --- | --- | --- | --- |
| **Unionized Supervisors with responsibility for entering time/payroll hours** | **Timekeeper** | **Initiate and Review** | • Initiate, Review time entry related tasks for Supervisory Organizations which they support  
• Manager will be required to ‘Approve’ time entries |

The following Workday Security Roles will be assigned by the IRP HCM team (departments do not need to assign these roles) and will not appear in the HRMS tool:

- HR Executive (Central HR Advisors, Manager, Associates, Coordinators, Leadership)
- FR Executive (Central FR Manager, Sn Manager, Assistant Manager, Admin Assistant)
- Central HR Partner (Central HR Admin Assistant (Vancouver) and HR Associates (Okanagan))
- Compensation Partner (Central Compensation)
- Benefits Partner (Central Payroll - Payroll and Benefits Team Lead)
- Absence Partner (Central Benefits – Disability Claims Associate)
- Retiree Partner (Retirement and Survivor Benefits (RSB) Associate)
- Payroll Partner (Payroll Representative)
- Pension Partner (Pension Administrator and Manager)
- Talent Partner (Central HR Roles that support the administrative function of PD programs)
- WorkLearn Office Partner (WorkLearn Office team who are involved in HR BPs)
- Academic Faculty Analyst (The IRP will assign this role to each individuals who have been assigned the Manager, HR Analyst, HR Partner, SN HR Partner or SN FR Partner Security Roles in an Academic Unit)
Appendix 3: Using the Senior HR & FR Partner Security Roles

3.1 The Senior HR & FR Partner Security Roles – Vancouver Campus Only

- The SR HR Partner provides additional approval for staff and student HR business processes
- The Senior FR Partner provides additional approval for faculty HR business processes
- After a SR HR Partner or SR FR Partner provides their approval in Workday, the final approval will route to central HR where applicable

When assigning these roles, keep in mind...

- The SN FR Partner Security roles are only used in Faculties
- It is recommended that the SR FR Partner Security Role be assigned to someone in the Dean’s Office who currently reviews Faculty information prior to the Dean. However, if assigning the SR FR Partner security role at the Department level, the individual assigned that role should have expert knowledge on all Faculty related policies and procedures, including knowing when the Dean is required to sign off on business processes. This role is responsible for adding the Dean as an approver where applicable
- If someone is assigned both the HR Partner and SN HR/FR Partner roles, they only need to approve once
- The SR HR Partner or Senior FR Partner can be assigned in 3 ways: at the Dean’s/Main office, at the departmental level, or at both the Dean’s/Main office and at the departmental level:

3.2 SR HR/FR Partner at the Dean’s/Main Office
3.3 SR HR/FR Partner at the Department level

The HR Partners will initiate and/or approve HR BP's, and the SR HR/FR Partner will be the additional department approver within the Sup Orgs they support.

3.3 SR HR/FR Partner at the Dean’s/Main Office and at the Departmental level

The HR Partners will initiate and/or approve HR BP's, and the SR HR/FR Partner will be the additional department approver within the Sup Orgs they support.
Appendix 4 – Inactive Positions in Position Management

- Only vacant positions that have been assigned to Sup Orgs will be moved into Workday in November.

- Review your vacant positions in Position Management and assign them to Sup Orgs as appropriate. If you do not intend to fill vacant positions going forward, we recommend you 'inactivate' the position directly in position management.

Appendix 6 – Inherited Supervisory Organizations

Appendix 7 – Highlevel Departmental Workflow

- The following **HR security roles** are involved in the department when initiating and approving HR business processes within the Sup Orgs they support: