

Workday for Faculty – Overview

UBC is implementing a new Human Resources and Finance system called Workday, with a vision of streamlining processes and creating a collaborative work environment for faculty, staff and students. Workday will go-live on November 2, 2020.

It is important to recognize that benefits won't be realized on Day 1, as it will take the community a while to become proficient in the new ways of working.

Here are the **top five changes** you will see with the new system, and how you prepare for Workday.

What are the Top 5 Changes with Workday?

1

DELEGATION

- Delegations are settings through the Workday system and can include tasks such as initiating an expense reimbursement.
- Faculty can **delegate specific tasks** (e.g. form completion to a staff member or task approval to a colleague) for a specific period of time, or for an undefined period. Check with your unit to see what delegation assistance is available.
- Delegation **does not transfer your responsibility** to the appointed delegate – it only allows someone to act on your behalf to perform the assigned task.

2

APPROVALS

- Physical signatures are now replaced with electronic signatures through Workday.
- Faculty has **transparency into past and outstanding approvals** / tasks within a defined workflow.
- There is also the ability to include in **additional workflow approvers to review tasks**.

3

NOTIFICATIONS

- Notifications for some business processes can be **delivered to your UBC Outlook email** inbox to offer real-time status updates with the options to forward.
- UBC email notifications can be forwarded to non-UBC emails to receive notifications and reminders to take action in Workday.

4

PROCUREMENT – Buying Goods and Services

- At go-live, **a catalogue of approved vendors will be available** in Workday through a “punch out” catalogue similar to an online shopping cart experience. Initially this will include the following vendors - Microserve, Staples and Staples Bulk Paper, VWR, Fisher Scientific, and Praxair. (Additional vendor catalogues will be brought on post-go-live in a priority manner).
- The eProcurement form will be replaced by a **purchase** requisition within Workday and electronically routed to the applicable approver(s).
- The recently introduced **Buyer role will be available** to support you when buying goods and services.
- Faculty members can initiate a purchase or get reimbursed from anywhere by **using a mobile device**.

5

GRANTS DASHBOARD

- The Grants Dashboard will **provide real-time, accessible information** including budget life to date, authorized start and end date, salaries life to date, expenses life to date, obligations, and commitments for grant and award portfolios.
- It is **integrated with RISE** and all other Finance and HR business processes.
- There is the ability to **group grants into sub-groups** to better manage funds per award.
Spend restrictions for real-time checking of eligibility of expenses based on sponsor requirements is enabled.

What's Not Changing?

- Faculty controls the delegation of tasks and duties. Faculty will continue to set permissions to assign tasks and duties.
- Notifications for key activities like approvals can be set up from Workday to be shared with a non-UBC email address.
- Administration, Finance and HR support is not changing.

What do I need to do to prepare?

- [Ensure you know and adhere to go-live deadlines](#)
- [Learn more](#) about the Grants Dashboard, Travel & Expense Management, Supplier Accounts & Procurement and Managing People
- Complete applicable training in advance of go-live
 - [Workday Basics](#): to learn how to navigate the Workday online environment (+ 40 mins)
 - [Workday for Faculty](#): to learn more about expenses, travel requirements and vacations (+1 hour)
 - [Workday for Managers](#): to learn about team management, review and the approvals process. (~60 minutes)
- Connect with your local IRP Transition Network Lead ([UBCV](#) | [UBCO](#)) to get the latest news about the transition to Workday and invite them to speak at a team meeting
- [Sign up](#) for the IRP newsletter and share IRP updates regularly with your teams
- [Attend](#) upcoming IRP Call Ins (or watch recordings) about preparing for go-live

Job Aids

Access and search all Job Aids [here](#).

- [Delegation](#) and [Expense Delegation](#)
- [Approvals](#)
- [Notifications](#)
- [Procurement](#)
- [Grants Dashboard](#)

What to Expect?

Before Go-Live

- All the latest information on the Integrated Renewal Program, including important dates, [FAQs](#) and other communications materials, is available to all on the [IRP website](#).

After Go-Live

- Additional support for questions, issues, and requests will be available through the [Integrated Service Centre \(ISC\)](#) post go-live. Once Workday launches, the current IT self-service portal will become UBC's self-service portal, providing access to Workday support.