Welcome to the IRP Researchers Event. We will begin shortly - please note:

- We have muted your audio and turned off your camera to ensure higher quality sound during the session. Please ensure your audio and camera remain off throughout the entire presentation.

- If you have a technical issue during the session, please use the chat feature.

- We will answer questions throughout the session as time allows.

⭐ To ask questions…
  - Click on the Q&A icon at the bottom of your screen in Zoom
  - Type in your questions and view questions from colleagues
  - Upvote your colleagues’ questions by pressing the “thumbs up” next to the question
INTEGRATED RENEWAL PROGRAM

RESEARCHERS EVENT
FACULTIES AND AFFILIATED INSTITUTES ENGAGED IN HEALTH RELATED RESEARCH

11 June 2020
LAND ACKNOWLEDGEMENT

UBCV is located on the traditional, ancestral, and unceded territory of the Musqueam people

UBCO is located on the traditional and ancestral territory of the Syilx Okanagan Nation
WHO HAS BEEN INVITED TO THIS WORKSHOP?

FACULTIES ENGAGED IN HEALTH RELATED RESEARCH

• Faculty of Medicine and Affiliated Institutes
• Faculty of Pharmaceutical Sciences
• Faculty of Dentistry
• School of Nursing, Faculty of Applied Science
• School of Kinesiology, Faculty of Education
INTRODUCTIONS

Dr. Ian Cavers
Associate Dean, Science
IRP Executive Sponsor

Allison Kim
IRP Finance Grants Lead

Leisa Belanger
IRP Finance Transformation Director

Patrick Kavanagh
IRP Finance Spend Functional Lead

Lani McGill
IRP HCM Business Lead

Jen Fullerton
IRP OCM Director
INTRODUCTIONS

Dean Kuusela
Associate Director, Research Services

Evelyn Miguel
Associate Director, Research Finance

Ashley Bloor
IRP HCM Subject Matter Expert, UBCO & Recruitment

Colette Hogg
IRP HCM Subject Matter Expert, Academic
WHY ARE WE UNDERTAKING THIS WORK?

Program Vision

The way we support learning and research, and how we work at UBC will be transformed, creating a cohesive, integrated, and enriched experience for students, staff, and faculty.
HOW DO I PREPARE?

**Be aware of what’s coming**
- Learning about IRP & Workday
- Being aware of the general timelines for the project
- Knowing where to go for more info

**Become familiar with what’s coming**
- Knowing what Workday looks like
- Understanding that change is coming
- Learn more about what’s changing

**Get Ready for Workday**
- Attend training and practice using Workday
- Train and teach others how to use Workday
- Get your units feeling ready and prepared to use Workday

**Go-live with Workday!**
- Attend additional training as needed post go-live
- Get support post go-live
RESEARCHER EVENT

3 RELEVANT WORKDAY TOPICS

RESEARCH GRANTS DASHBOARD
Learn more about the Research Grants Dashboard, a tool designed to support you with decision-making with the ability to view all your grants and key information in one place.

TRAVEL & EXPENSE MANAGEMENT
Learn more about submitting expense reports and ordering supplies in Workday.

SUPPLIER ACCOUNTS & PROCUREMENT
Learn more about key changes and benefits from a Human Resources perspective.

MANAGING PEOPLE
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:00 – 4:05</td>
<td>Opening Remarks</td>
</tr>
<tr>
<td>4:05 – 4:15</td>
<td>Research Grants Dashboard – Introduction</td>
</tr>
<tr>
<td>4:15 – 4:30</td>
<td>Workday Key Concepts</td>
</tr>
<tr>
<td>4:30 – 5:35</td>
<td>Q&amp;As - 5 min</td>
</tr>
<tr>
<td>4:35 – 4:55</td>
<td>Travel &amp; Expense Management, Supplier Accounts &amp; Procurement</td>
</tr>
<tr>
<td>4:55 – 5:00</td>
<td>Q&amp;As - 5 min</td>
</tr>
<tr>
<td>5:00 – 5:05</td>
<td>Break - 5 min</td>
</tr>
<tr>
<td>5:05 – 5:20</td>
<td>Managing People</td>
</tr>
<tr>
<td>5:20 – 5:25</td>
<td>Q&amp;As - 5 min</td>
</tr>
<tr>
<td>5:25 – 5:35</td>
<td>Research Grants Dashboard – Tying It All Together</td>
</tr>
<tr>
<td>5:35 – 5:45</td>
<td>How You Will Be Supported</td>
</tr>
<tr>
<td>5:45 – 5:55</td>
<td>Q&amp;As - 10 min</td>
</tr>
<tr>
<td>5:55 – 6:00</td>
<td>Closing Remarks</td>
</tr>
</tbody>
</table>
RESEARCH GRANTS DASHBOARD FOCUS GROUPS

20 Attendees

14 Faculties represented

9 significant improvements to the dashboard based on feedback received from Principal Investigators
RESEARCH GRANTS DASHBOARD - INTRODUCTION
ALLISON KIM
RISe will remain for pre-award administration while Workday will be used for post-award administration. Through the Grants Dashboard, you will be able to see an integrated view of HR & Finance information (ex. expense reports, procurement or goods and services, and employee life cycle) to help you with decision-making.
<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Investigator</td>
<td>Principal investigator (primary researcher) for grant. Allows view access to Grants Dashboard.</td>
</tr>
<tr>
<td>Grant Manager “approver role”</td>
<td>Role given to PI in general for “approval authority”. In cases of salary awards, Grant Managers are assigned to one-over-one as such PI may not have “approval authority”</td>
</tr>
<tr>
<td>Grant Financial Analyst</td>
<td>Role given to provide “view only” access to individual grant. Typically this role should be assigned at the lab level for access to ledger balances without payroll detail</td>
</tr>
<tr>
<td>Grant Recipient</td>
<td>Role given to recipient of grant for salary and fellowship awards.</td>
</tr>
<tr>
<td>Administrative Principal Investigator</td>
<td>Role assigned to the department head for salary and fellowship awards.</td>
</tr>
</tbody>
</table>
Workday’s search functionality enhances user experience – can search by PI last name, year of application, sponsor, and Speedchart.

Users can see the award contracted start and end date, along with the pre-authorized spend date and the authorized spend to date in one view in Workday.

Users are able log into Workday to dynamically see award information (e.g., budget information, funding remaining).

Users can see all expired grants and expiring grants in one view.

Additional grant-related reports are being created to help with your decision making.

Users can see Research Grants Dashboard and approve business processes on mobile.

Users can see positions being paid from grants (i.e., Position, Past Allocation, Current Allocation, Future Allocation, etc.) with warnings as the position and grant end date draws near.
Users can see award contract amount and invoiced amount from the university on the Billing page.

This report is under development to show unpaid invoices by sponsor.

Line Billing Notes will show who is initiating billing for contract awards (ex. for clinical trials).
CORE ELEMENTS OF WORKDAY

- Supervisory Organizations
  Reporting Relationships between Managers and Employees

- Finance FDM Elements
  Cost Centers, Worktags, etc.

- Functional Units
  HRMS Department Codes

- Academic Units
  The Delivery of Education across UBC

Workday at UBC
In Workday, we will be using Foundational Data Model elements similar to existing Chartfields to tag (or allocate) items for accounting and financial reporting purposes.

Updated Cost Centre Hierarchy aligned with Supervisory Organization (Sup Org)

Updated Chartfield language, known as FDM elements, with meaningful descriptors for reporting and analytics

FDM NAMING CONVENTION FOR GRANTS

Example:

HHJW GR008356 UBCURRF 2005 Foster
HKGP GR008406 NSERC 2015 Foster
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.

• If there is a dual report, they will also be in a **Matrix Organization** with the additional manager assigned as a matrix manager.
QUESTIONS & ANSWERS (5 MIN)

To ask questions….

Click on the Q&A icon at the bottom of your screen in Zoom to open the Q&A box and type in your questions and view questions from colleagues. You can up vote your colleagues questions by pressing the “thumbs up” next to the question. **We will be answering the most upvoted questions in this Q&A session.**
TRAVEL & EXPENSE MANAGEMENT
+
SUPPLIER ACCOUNTS & PROCUREMENT

PATRICK KAVANAGH
**Workday Expense module**
- Intuitive web-based application
- Real-time online review and approval

**Mobile Readiness**
- Native iOS and Android Apps
- Capture receipts directly into Workday

**UBC VISA Card/P Card Reconciliation**
- Reconciled through expenses
- Expense Reports will be able to pull in UBC VISA Card and P Card transactions for reconciliation
WHAT’S CHANGING – EXPENSES

<table>
<thead>
<tr>
<th>Today</th>
<th>All UBC employee expenses will be processed using the Workday Expense module (no more manual forms)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Unified process for Expenses and Credit Card Reconciliation</td>
</tr>
<tr>
<td></td>
<td>Student reimbursements will be processed using Workday Expenses</td>
</tr>
<tr>
<td></td>
<td>Digital copy of receipt in Workday to be the original following approval</td>
</tr>
<tr>
<td></td>
<td>Approval processes to be standardized and streamlined</td>
</tr>
<tr>
<td></td>
<td>Expense policy / guidelines to be incorporated into Workday where appropriate</td>
</tr>
</tbody>
</table>

- Expense reports are prepared through an Excel, paper Qreq, or a Treq with receipts
- Different manual processes for Credit Card Reconciliations
- Approval through paper signatures on the forms with limited visibility of status
- Receipts are filed and stored for 7 years
- Manual paper based process to request credit card
**WORKDAY SUPPLIER ACCOUNTS & PROCUREMENT**

**Supplier Set-up**
- Request Supplier Set-up (internal)
- Request Supplier Set-up (external)

**Procurement**
- Create Purchase Requisition
- Issue Purchase Order & Change Order
- Receive Goods & Services

**Supplier Invoices**
- Match PO Invoice
- Approve non-PO Invoice

**Online Catalogues**
- ✓ Create and submit requisitions for goods and services with a consumer-like experience
- ✓ ‘Punchout’ to supplier websites from Workday

**Supplier Enablement**
- ✓ Enable suppliers to self-register and maintain their own data, like address and banking details
- ✓ Electronic Invoicing
## WHAT’S CHANGING – PROCUREMENT & INVOICES

### Today

- Invoices sent directly to faculties/admin units
- Invoices printed, reviewed by requestors and approvers to confirm receipt of goods or services – “OK To Pay”
- Q-Req completed, invoice scanned and sent to Accounts Payable or entered in OPT
- No visibility of Invoice in the system until it has been entered in PeopleSoft

### Shift to receipt of invoices from supplier via electronic interface (no paper or pdf)

- Enter confirmation of receipt or goods/services in Workday for POs
- ‘Three-way match’ of PO to Receipt to Invoice – no need for requestor to review invoice (unless exception)
- Non-PO invoices routed to requestors in Workday for coding – then approved
- Communications to suppliers to send invoices to FinOps Accounts Payable
- Workday request for non-invoice payment requests received in faculty/unit
WORKDAY EXPENSES & PROCUREMENT: DEMO
PATRICK KAVANAGH
To ask questions….

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BREAK
5 MINUTES
MANAGING PEOPLE
LANI MCGILL
WHAT’S CHANGING – HR OVERVIEW

Today

- **Paper & Manual Processing**
  - Use of multiple systems to find, use and update data

Online initiation & approvals

- Reduced use of paper timesheets for hourly employees
- Online Offer Letters & Esignatures for staff and student hires
- Online Onboarding processes

Real time accessible data

- Faculty members can view tenure start dates & status
- Payroll, absence, time entry & the employment lifecycle all in one system
- Clear views UBC reporting structures & ‘team views’ for Managers
With Workday…

- **My Team Views**: See job details, length of service and base pay of all team members to better forecast new hire salaries to ensure equity among the team.

- **Academic Appointments**: View tenure start dates, status and more through Academic Appointments for your team.

- **Team Absence Calendar**: Ability to see team time off calendar with all leave options to better plan time off schedules (Faculty sick and vacation are not tracked in Workday).

- **My Team’s Time Off Balances**: Ability to see all team’s time off balances (broken down into each category) in one view.
MANAGING PEOPLE CONTINUED

With Workday…

• **UBC Careers Site and Posted Job Requisitions**: Option to use the UBC Careers site through Workday to move candidates throughout recruitment process and views of all open positions for my team.

• **Faculty Recruitment Search Committees (Manager of Faculty only)**: Ability to use Workday committees to track committee meetings, decisions, and minutes.

• **Online Approval Workflow with Notifications and Inbox Management**: Clear view of past and outstanding approvals / tasks with a defined workflow and ability to forward notifications to Outlook.

• **Task Reassignment and Delegation**: Ability to reassign or delegate tasks or specific business processes for a specific period of time when on vacation or out of the office.
‘MY TEAM’ WORKLET

My Team

Actions
- Transfer, Promote or Change Job
- Terminate
- Create Job Requisition
- Edit Job Requisition
- Add Job
- End Additional Job
- Create Position
- Place Worker on Leave
- Return Worker from Leave

View
- My Org Chart
- Active Employees - Indexed
- Timeline
- Headcount
- Organization Directory
- My Leadership Roles
- Organization
- Organizations I Belong To
- Org Charts
- Compare Team

Less (4)
QUESTIONS & ANSWERS (5 MIN)

To ask questions....

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RESEARCH GRANTS DASHBOARD - DEMO
ALLISON KIM
HOW YOU WILL BE SUPPORTED
JEN FULLERTON
HIGH LEVEL TRAINING MILESTONES

- **June 22 – July 17**
  - Train-the-Trainer

- **July 20**
  - Training delivery begins (self-serve & webinar)

- **November**
  - Go-Live

**Training is Live**

- **September**
  - Refresher training offered
TRAINING DELIVERY METHODS

Online Step by Step Guides
via UBC's Canvas Catalog

Online Training Videos
via UBC's Canvas Catalog

Webinar training

Hands-on training for heavy users

Training delivery method will vary based on the complexity of learning required by different stakeholders
TRAINING TOPICS

1. Workday Basics
   Key concepts & basic navigation

2. Workday for Faculty, Staff & Student Employees
   Learning applicable to ALL faculty / staff / student employees in UBCV/O

3. Workday for Managers
   Learning applicable to ALL Managers

4. Finance & HR Super User Training
   Learning applicable to Central and Distributed HR & Finance Roles

Finance Training Curriculum
- Accounting & Workday Financials 101
- Supplier Accounts & Procurement / Travel & Expenses
- Research Post-Award Grant Admissions
- Financial Reporting & Institutional Accounting
- Banking & Settlement
- Capital & Asset Accounting
- Customer Accounts & Revenue Accounting
- Project Accounting
- Taxes

HR Training Curriculum
- Create Position
- Recruitment
- Hire
- Change Job
- Academic Appointments
- Onboarding
- Benefits
- Compensation
- Payroll
- Absence
- Time Tracking
- Termination
- Workplace Learning
- Reporting
- PD Fund
TRAINING SUPPORT MODEL

HR & FIN SMEs
Functional experts who will support Trainers

IRP Trainers
Comprised of Transition Network members, the IRP training team, and distributed volunteers across campuses

Train the end user community via webinar training

Transition Network Members
Comprised of individuals across various faculties and units

Provide key local support for faculties and units, cascade key messaging, and gather feedback

Workday Learning Rovers
Comprised of FT Coop Students providing hands on Workday support prior and post go-live

Provide hands on key local support for faculties and units when required. Distributed across campus.

Faculties and Units (UBCV & UBCO)

HR & Finance Central Units

Researchers Event
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Want to learn more?

Visit [http://www.irp.ubc.ca/](http://www.irp.ubc.ca/) to learn more about the program, latest news and Workday videos.

Subscribe to the IRP Newsletter at [https://irp.ubc.ca/news/newsletter.html](https://irp.ubc.ca/news/newsletter.html)

Watch a 2-minute video of Professor Ono sharing his vision for the Integrated Renewal Program, “The Workday Implementation Journey Starts Now” (News section).

Watch a 2-minute video of Professor Deborah Buszard in “Growing Together: IRP and UBCO” (News section).

Visit [www.Workday.com](http://www.Workday.com) to learn more about its commitment to higher education. Visit Workday’s [YouTube](https://www.youtube.com) channel.
The Integrated Renewal Program would love to hear from you! If you have any questions or comments please get in touch.

WEBSITE irp.ubc.ca

CONTACT US VIA SERVICE NOW https://irp.ubc.ca/contact