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 ENGAGED IN SOCIAL SCIENCES AND HUMANITIES RESEARCH

16 July 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 SOCIAL SCIENCES AND HUMANITIES RESEARCH

• Allard School of Law
• Faculty of Arts
• Faculty of Education
• Sauder School of Business
INTRODUCTIONS

Dr. Andrew Szeri
Provost and Vice-President, Academic; 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

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.

Modern Systems + Reliable Data + More Efficient Processes + Well-supported people
WHERE ARE WE AT IN THE PROGRAM?

Release 1 HR and Finance Go-Live: Nov 2nd 2020

June – October 2020
Train the Trainer & Training Delivery
We are here!

July 2020
User Confirmation Review Sessions

8 Researchers Event
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.

MANAGING PEOPLE
Learn more about key changes and benefits from a Human Resources perspective.

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

SUPPLIER ACCOUNTS & PROCUREMENT
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00 – 10:10</td>
<td>Opening Remarks</td>
</tr>
<tr>
<td>10:20 – 10:35</td>
<td>Workday Key Concepts</td>
</tr>
<tr>
<td>10:35 – 10:45</td>
<td>Managing People</td>
</tr>
<tr>
<td>10:45 – 10:55</td>
<td>Q&amp;As - 10 min</td>
</tr>
<tr>
<td>10:55 – 11:00</td>
<td>Break - 5 min</td>
</tr>
<tr>
<td>11:00 – 11:20</td>
<td>Travel &amp; Expense Management, Supplier Accounts &amp; Procurement</td>
</tr>
<tr>
<td>11:20 – 11:30</td>
<td>Q&amp;As – 10 min</td>
</tr>
<tr>
<td>11:30 – 11:40</td>
<td>Research Grants Dashboard Demo – Tying It All Together</td>
</tr>
<tr>
<td>11:40 – 11:50</td>
<td>How You Will Be Supported</td>
</tr>
<tr>
<td>11:50 – 11:58</td>
<td>Q&amp;As - 8 min</td>
</tr>
<tr>
<td>11:58 – 12:00</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.
### GRANTS MANAGEMENT: KEY SECURITY ROLES

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Investigator</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 Manager “approver role”</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 Financial Analyst</td>
<td>Role given to recipient of grant for salary and fellowship awards.</td>
</tr>
<tr>
<td>Grant Recipient</td>
<td>Role assigned to the department head 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.

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

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

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 Research Grants Dashboard and approve business processes on mobile.
WORKDAY KEY CONCEPTS
LEISA BELANGER
WHY WORKDAY?

- An integrated solution for HR, Finance, and Student
- Intuitive interface for everyone, not just super users
- Cloud-based solution where VPN is not required
- Mobile devices ready
- Real-time information
- One integrated data set
- Privacy and data security
WHAT ARE BUSINESS PROCESSES IN WORKDAY?

OVERVIEW

Processes that follow a defined workflow, with automated handoffs facilitating actions and **approvals** required to complete tasks.
DELEGATING TASKS IN WORKDAY - OVERVIEW

• 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

• Delegation does not remove accountability for the original user

• Delegation does not transfer a persons’ security permissions to the appointed delegate, only security related to performing the delegated tasks

• Faculty/Administrative Units may adopt delegation practices to align with unit specific leadership perspectives
CORE ELEMENTS OF WORKDAY

Supervisory Organizations
Reporting Relationships between Managers and Employees

Finance FDM Elements
Cost Centers, Worktags, etc.

Academic Units
The Delivery of Education across UBC

Functional Units
HRMS Department Codes

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

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

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 Human Capital Management (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.
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
MANAGING PEOPLE

A Manager in Workday is defined as an individual who is responsible for decisions making in terms of hiring, performance management and termination within their team.

As a Manager, you will have real-time accessible data to see information about your team including:

- **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 such as sick and vacation in one view.
• **UBC Careers Site and Posted Job Requisitions**: Use the UBC Careers site through Workday to move candidates throughout recruitment process and views of all open positions for my team (optional for Faculty and Student Recruitment)

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

• **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 Delegation**: Ability to delegate tasks or specific business processes for a specific period of time when on vacation or out of the office or on an ongoing basis
## Compare Team

**Organization**: Department of MySpace (Morgan MySpace)

<table>
<thead>
<tr>
<th>More</th>
<th>23 items</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adam Wilson</th>
<th>Ali Admin</th>
<th>Allister Hamilton (On Leave)</th>
<th>Amy Carr</th>
<th>Ben Dennis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Job</td>
<td>CUPE 2950 Salaried - Administrative Support 5 (Gr9)</td>
<td>AAPS Salaried - Administration, Level B</td>
<td>CUPE 2950 Salaried - Administrative Support 5 (Gr9)</td>
<td>Associate Professor (tenure)</td>
<td>Associate Professor (tenure)</td>
</tr>
<tr>
<td>Years in Current Job</td>
<td>0.06</td>
<td>0.15</td>
<td>0.06</td>
<td>0.23</td>
<td>0.15</td>
</tr>
<tr>
<td>Years of Service</td>
<td>0.06</td>
<td>0.14</td>
<td>0.06</td>
<td>0.23</td>
<td>0.14</td>
</tr>
<tr>
<td>Hire Date</td>
<td>2020-06-01</td>
<td>2020-05-01</td>
<td>2020-06-01</td>
<td>2020-04-01</td>
<td>2020-05-01</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Base Pay</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Annualized Amount</td>
<td>$27,982.60</td>
<td>$41,552.21</td>
<td>$27,982.60</td>
<td>$120,000.00</td>
<td>0</td>
</tr>
<tr>
<td>Last Increase Amount</td>
<td>$2,331.88</td>
<td>$34.28</td>
<td>$2,331.88</td>
<td>$10,000.00</td>
<td>0</td>
</tr>
<tr>
<td>Last Increase Percent</td>
<td>0.00%</td>
<td>1.00%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Years Since Last Increase</td>
<td>0.06</td>
<td>-0.52</td>
<td>0.06</td>
<td>0.23</td>
<td>0.00%</td>
</tr>
<tr>
<td>Date of Last Increase</td>
<td>2020-06-01</td>
<td>2021-01-01</td>
<td>2020-06-01</td>
<td>2020-04-01</td>
<td>2020-05-01</td>
</tr>
</tbody>
</table>
‘TEAM ABSENCE CALENDAR’ WORKLET
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.**
BREAK
5 MINUTES
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>Future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense reports are prepared through an Excel, paper Qreq, or a Treq with receipts</td>
<td>All UBC employee expenses will be processed using the Workday Expense module (no more manual forms)</td>
</tr>
<tr>
<td>Different manual processes for Credit Card Reconciliations</td>
<td>Unified process for Expenses and Credit Card Reconciliation</td>
</tr>
<tr>
<td>Approval through paper signatures on the forms with limited visibility of status</td>
<td>Student reimbursements will be processed using Workday Expenses</td>
</tr>
<tr>
<td>Receipts are filed and stored for 7 years</td>
<td>Digital copy of receipt in Workday to be the original following approval</td>
</tr>
<tr>
<td>Manual paper based process to request credit card</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>
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

**Workday**

- 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….

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.**
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)

September
Refresher training offered

November Go-Live

Training is Live
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)
QUESTIONS & ANSWERS (10 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.**
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