Integrated Renewal Program Go-Live Checklist

THE UNIVERSITY OF BRITISH COLUMBIA

Welcome to Workday!

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Welcome to Workday!

Welcome Message

We are pleased to announce that UBC is now live with Workday for HR and Finance, replacing systems that were 25 years old or more. This marks a major milestone in UBC's journey representing a big step forward in supporting our learning, research and working environments. By modernizing and simplifying processes and bringing them into an integrated system, we will spend less time on paperwork and provide you with the tools you need to continue to be a leader in teaching, learning, research and growth.

What to do on Day 1

Get Started

- ❒ Read this go-live checklist
- ❒ Complete the checklist in this document using linked resources
- ❒ Login to Workday
- ❒ Check your Workday Inbox
- ❒ Familiarize yourself with Workday. Use these quick reference guides or review training to make the most of Workday!

Critical First-Week Items

- ❒ **Hourly employees** (including student employees): submit your timesheets directly in Workday by **November 6**.
- ❒ **Managers/Leaders of hourly employees**: approve time sheets when the approval appears in your Workday inbox. You will need to approve the first timesheets by **November 9**.

Important to keep in mind

- Keep your personal information secure
- Workday is protected by strong website encryption to keep your information safe. Please do your part to keep personal information secure.
- If you have concerns about a Workday message you receive via email, don't open suspicious messages or click on any links; instead forward the message as an attachment to security@ubc.ca.

Actions for the first week of Go-Live

Use the following actions to get started with Workday in your first week. Read through all tables that apply to you.

Faculty and Staff

Actions	Task	Resources
Sign into Workday	Click here to login to Workday. To login to Workday, an active Campus Wide Login (CWL) account is required. You may be required to use an enhanced CWL. If you can't sign into Workday, contact the UBC Self-Service Portal. For more information access the ISC contact details below. **TIP**: Bookmark the Workday link in your browser(s) to make it easily accessible. Workday is accessible via all modern internet browsers.	Click here to access the IRP website. Enhanced CWL set up
Download the Workday Mobile App (Optional)	• Download the Workday app (available on Apple or Android). • Login using your CWL and password. • You will be automatically prompted to set up an authentication method (i.e., FaceID or a PIN). • Your PIN must be at least 5 digits long. • After 3 PIN failures, your account will be locked – contact the ISC to gain access. **TIP**: Contact your Transition Network (TN) Lead (UBCV | UBCO) if you need support.	For more information click: How to Install Workday App on your Mobile Phone
Check your personal information and make updates as required	Review your personal profile and update if required, including: • Emergency contacts • Address and phone numbers (including a cellphone number will enable us to send you text message alerts in the event of an emergency) • Direct deposit details • Personal information (e.g. marital status) • Social Insurance Number • Tax information • Benefits (View)	Click **Personal Information** on your Workday home page. **More help?** Check out the Personal Information "How do I…?" cheat sheet.

Faculty and Staff

Actions	Task	Resources
Check your personal information and make updates as required (continued)	Please note absence balances will be updated in Workday in the first week after Go-Live. Check back **after November 9** to complete the actions below. **What to do on November 9?** **Staff** • Review your vacation balances in Workday (as well as sick and banked overtime, if applicable). • Submit any new vacation requests in Workday (includes previously planned vacation after November 15 that was not transferred into Workday). **Note**: Historical time for M&P staff has not been loaded into Workday. It will continue to be manually tracked in units. **Faculty** • Faculty members will not use vacation balances in Workday, so no vacation plan or balance will be visible. • No action is required for this task as there are no items for faculty to validate in Workday. • Sick leaves can be entered into Workday, but there is no accrual or balance - you will be able to see when you took a sick day. • For longer sick leaves, enter details into Workday to track time off.	 Click **Absence** on your Workday home page. **After November 9**, if you don't see a balance you were expecting in Workday, check in with your manager | supervisor.
Boost your skills through training	If you haven't already done so, check out the training resources available. This will help you navigate and understand what you need to know. Click Workplace Learning to see the available training based on your role. Post go-live, support sessions will be available. Check out the Office Hours (Q&A and Ad hoc training as required) and additional webinars.	**Questions?** Visit the UBC Self-Service Portal

Faculty and Staff

Actions	Task	Resources
Update notification preferences	By default, email notifications from Workday will be sent to your primary email address. This email is also visible to all users (similar to the UBC Directory), please do not change this email to a personal email address. **Note**: These email notifications do not have a link to Workday. You will need to login to Workday to action any tasks. **Tip:** If you do not want to receive these notifications, go to Workday to turn them off. For help, attend Office Hours, check out the cheat sheet or contact your Transition Network Lead (UBCV | UBCO).	**More help?** Check out the "How do I… Turn Off my Notifications?" cheat sheet".
Complete Inbox Tasks	Check your Workday inbox and action any items. For help, attend Office Hours, check out the cheat sheet or contact your Transition Network Lead (UBCV | UBCO).	

People Managers and Budget Managers

Actions	Task	Resources
Approve Hourly Employees Time Sheets	If hourly employees report to you, it is important you approve their hours to meet payment deadlines – employees will not be paid if this deadline is not met! The first approval date deadline is **November 9**. This means employees need to submit their first Workday timesheet by **November 6**. Please ensure your employees adhere to this deadline. Approval is required bi-weekly. We recommend you talk to your employees to ask to submit their time weekly.	 Click **Processes Awaiting Me** on your Workday home page.
Set up Delegations (Optional)	If you want to delegate tasks (e.g., reconcile expenses, create expense reports, or approve purchases) you will need to set up delegations in Workday. If you need support, check out the cheat sheet, attend an Office Hour session, or contact your Transition Network Lead (UBCV | UBCO).	**More help?** Check out these cheat sheets: • "How do I… Delegate Approval of Expenses?" cheat sheet. • "How do I… Delegate Creating an Expense Report?" cheat sheet. • "How do I… Delegate Inbox Tasks?" cheat sheet. • "How Do I… Delegate the Initiation of a Business Process?" cheat sheet.
Review your SupOrg (Organizational Chart)	Review your Organizational Chart (Sup Org) and ensure it is correct. If your SupOrg (Org Chart) requires an update, contact with your local HR representative for further information. Additional information is available in Frequently Asked Questions located here. For security role questions, go to your HR | Finance Director for more information.	 Click **My Team** on your Workday home page. **More help?** Check out the "How do I… View my Org Chart?" cheat sheet.

Additional information

Probation period: Tracking of probation period for staff currently on a probation period has not been loaded into Workday. For these in-flight cases continue to track these as you do today.

From November 2 onwards, new hires and transfers **with probation periods will be tracked in Workday.**

Hourly Staff (including student employees)

Actions	Task	Resource
Enter your hours in Workday	**Ensure** you enter your time by **Friday, November 6** so you are paid accurately! **New Payroll Dates** • The first payday in November will be November 6 for the October 15-31 pay period. • Beginning November 15, you will now be paid of the 15th and last day of every month. • There will be *no interruption* in pay – unless you do not enter your time by November 6.	 Click **Time** on your Workday homepage.

Where do I go for support?

The Integrated Service Centre (ISC)

The Integrated Service Centre (ISC) will be your point of contact for Workday related Finance, and HR queries, with some exceptions. Continue to direct confidential or sensitive HR queries to HR. If you are a departmental administrator supporting HR or Finance tasks, continue to work directly with your existing contact in HR or Finance. Continue to contact the IT Service Centre's you do today for IT support outside of Workday.

For additional guidance and common examples of how to access support, review the **ISC Support Cheat Sheet.**

The ISC team can assist you with:
- Using Workday, understanding Workday functionality, or understanding Workday errors
- Completing Finance or HR tasks
- Referring you to other support teams as appropriate

Workday enhancements and improvement requests can be shared with the ISC via submission of a ticket through the UBC Self-Service Portal at: https://ubc.service-now.com/selfservice

How do I get help?

Step 1: Access the ISC online portal and knowledge base
Search the online knowledge base or submit and track a ticket via the UBC Self-Service Portal.

This comprehensive, self-service, searchable knowledge base is accessible 24/7. If you can't find an answer to your question in the knowledge base, submit a ticket through the self-service portal. They will respond to you within 1-2 business days. Resolution time will vary depending upon the complexity of your query.

Step 2: Connect with a Learning Rover
Connect virtually via the Learning Rover Office Hours or reach out to your Transition Network Lead (UBCV | UBCO). Learning Rovers are co-op students hired to help the UBC community use Workday. They will be able to help you with basic Workday tasks.

Step 3: Call the ISC
If you prefer to talk directly to a service representative or your query is urgent, call the ISC:
- Vancouver | (604) 822-8200
- Okanagan | (250) 807-8163

ISC hours of operation are Monday - Friday, 7:30 am - 5:00 pm.

Routine Maintenance and Outage Times

Downtime periods will be posted on a weekly basis via Workday this Week on the Self-Service portal.

During the first few weeks after go-live, UBC will have weekly releases on Tuesday and Thursday evenings. These are scheduled to minimize impact on operations. A full release calendar will be available shortly and can be found in the Workday Knowledge Base.

Additional Resources

Note: Many of the links below require a CWL login.

Helpful Links

Training

Hypercare Office Hours, Training and Events Calendar

Workplace learning

Searchable FAQs

Support

ISC Self-Service Portal and Knowledge Base

UBC IT

Contact a Learning Rover through your Transition Network Lead (UBCV | UBCO)