June 3 Workday Wednesday Q&A

General

Q: Will the slides be sent out to our emails?
A: Slides will be posted on the IRP UBC website under Events and Demos.

Q: Will the recording of this session be available to us later?
A: Yes it will be posted on the IRP UBC website under Events and Demos.

Q: How do we sign up for the newsletter? Missed the instructions.
A: You can sign up for the newsletter here.

Training

Q: Which security roles will receive training as train the trainer?
A: HR Partner/Analyst Roles, Cost Center Manager, Program Manager, Gift Manager, Gift Initiative Manager, Internal Service Delivery, Data Entry Specialist, Grant Manager, Principal Investigator, Admin Principal Investigator. We will also cover the Employee-as-Self and Manager-as-Self roles for all trainers.

Q: Is the training restricted to your role?
A: Generally the way that Workday functions is it will assign you a security role to your position, which will allow you to access the different areas of Workday. The training is tied and related to your security role capabilities in Workday. However, we know that as you move through UBC you'll be assigned different roles. The training will be available to anyone who is being assigned a certain security role. If you are anticipating moving to a new role, there's the ability to take the relevant training.

Q: Given the current COVID-19 situation, will the training be done in person on campus or remotely?
A: Because of COVID-19, we're anticipating that before go-live we will be doing completely remote training. The current plan is for training to be delivered remotely via Zoom. You'll still be in smaller cohorts and will be able to access the Training Sandbox, which is essentially a Workday Sandbox where you'll be able to go in as a fake user and practice, especially for complex roles like the HR Partner or administrative roles.

Q: So we can only start training in July? How do we become a trainer?
A: We've been working with our Community Engagement Partners and Transition Network leads and captains to identify trainers for the Train the Trainer program. If you believe you should have been invited to these sessions, please identify your transition lead or captain and reach out to them. If you are unsure who the transition lead or captain is for your unit, please contact Mike Nichols.

Q: Do we have to sign up for training courses or will we be invited to sessions?
A: That is dependant on your role. UBC just launched wpl.ubc.ca, which is an initiative to centralize and place all training available for UBC employees in a single searchable site. That site will be used to sign up for general Workday training for faculty, managers and employees. However, the more specialized central roles (e.g. Financial Operations, Payroll, central HR), will be scheduled sessions with invites sent out.

Q: If you are not HR but do payroll will you get training in payroll?
A: Yes if you are part of UBC Payroll team, you will receive specialized training for the Payroll Partner and Payroll Representative roles.

Q: Could we upload training sessions and have it saved in our secured SharePoint?
A: We will be uploading everything to Canvas in terms of training materials, which will be accessible via wpl.ubc.ca.

Q: Is this live now?
A: The Sandbox site will be available and accessible via the courses we will launch after July 20 for employees and managers.

HR

Q: Where would you find a T4 slip?
A: The T4 slips will be in your employee profile.

Q: Will pension information be included under the Benefits icon?
A: Pension information will be accessible in your employee profile.

Q: Does a faculty member do this for their tech staff?
A: Any tech staff that work for a faculty member, so long as they are UBC staff, will also have access to their employee dashboard. Faculty, for the most part, will be using the delegation feature to delegate some of those administrative roles to their admin staff. There will be faculty members who need to hire people like TAs, which would be a collaboration with their admin staff and the HR Partner.

Q: Is tuition waivers being added to Workday too?
A: Yes, there will be an integration in Workday. There is an integration for professional development to access and sign up for courses. Workday will keep track of the amount you have assigned in a waiver.

Q: Will job applications, currently in the portal, move to Workday?
A: Employees can view and apply to job postings when they log into their Workday profile. External candidates will still refer to our careers website where they can apply to jobs and create a candidate profile in Workday.

Q: Will there be a section for job applications to make sure that your application is flagged as internal?
A: Employees can view and apply to job postings when they log into their Workday profile. External candidates will still refer to our careers website where they can apply to jobs and create a candidate profile in Workday.

Q: Absence: Can staff make changes to their absence request?
A: Yes you can make changes but not once approved.

Q: What happens if you're a manager and on vacation. Where do the staff requests go then?
A: You will need to delegate some of your tasks out to whoever is responsible for you while you are away. The requests would then go to that responsible person.

Q: Does that mean the current PAT system we use for vacation will be replaced by Workday once it goes live?
A: Yes that is correct, PAT will be replaced by Workday since Workday will accommodate all absences, both short term time off and long term leave of absence.

Q: As an employee, can you see other team members' vacation schedules (to ensure no overlaps)?
A: As of right now, the manager has the ability to see their team’s schedule. We’ll have to take this back to the functional team to see if there’s a way that members can see other members’ vacation time.

Q: How do the employees find out that their manager has approved their vacation?
A: This will show in your Workday inbox under the action item's processes as an approval.

Q: How will Workday transfer over vacation balances etc.?
A: The IRP team will transfer PAT balances to Workday.

Finance

Q: What will become of the QReq randomizer?
A: The QReq and TReq forms will no longer be used when Workday is implemented.

Q: Can you change the tax percentage under expenses? The bookstore has a cheaper tax rate for departmental purchases.
A: 'Internal Service Delivery' (ISD) functionality in Workday cannot calculate taxes. If a department has to calculate mandatory taxes, it has to be brought in with the taxes and then the taxes can be redistributed with an accounting journal to the appropriate liability ledger accounts.

Q: Does this mean we don't have to submit original receipts any more? Just a scan or photo in pdf?
A: UBC is working on putting processes in place that will allow us to deem the digital copy as the original. The confirmation of this will be communicated as part of training and roll-out. However, notwithstanding this decision, originals should be retained by initiators until the expense is fully approved; as there could be instances where the initial digital copy is illegible and warrants another picture or scan. Digital copies will be retained either in Workday or an integrated document management system to meet our audit requirements.

Q: Can you add multiple receipts to the expense report?
A: Yes you can add multiple expense items to an expense report

Q: Will paying a vendor look similar to submitting an expense claim?
A: The expense report process will only be used for UBC employees and students. Payments to other groups, including UBC visitors, will be handled through Workday's supplier accounts functionality.

Additional information on Workday's supplier accounts module was provided in the July Finance call-in session. Please refer to the IRP Finance resources website for recording and presentation material.

Q: If you put in an expense report, is the system smart enough to match your CWL to the right Cost Centre and all of those values or do you need to contact your finance department to ask for all of the values?
A: If a program, grant, project, or gift is not specified, the charge will need to be directly applied to a cost center. The default worktags for a worker are derived from the employee position in Workday HCM.

Q: You mentioned an expenses demo on June 17. Where would I sign up for this? I looked at the training section on the IRP website but can't find it.
A: The FIN/HR call-in schedule for 2020 can be found here. The schedule is on both Finance and HR resource pages under the toolkit.

Q: For the expenses example. What would happen with the original receipts? Do we need to be keep/send them somewhere?
A: We are working to have all policies and procedures in place so that Workday's digital copy will be considered the original copy. That being said, it is best practice as an expense claimant to hold on to your receipts before the claim is processed to ensure the digital copy is accepted and that there is nothing covering important information in the picture, etc.

Q: Can expense and leave approvals be delegated to another UBC staff, i.e. administrator?
A: You can delegate an approval if you're away for a period of time (e.g. vacation). In Workday, if an approver wants to delegate this permanently, we would re-assign the security role to the new approver and not perform a delegation.

Q: If a receipt has items with different tax implication, how can it be entered in the expense module?
A: These can be entered on the same expense report - they would need to be itemized or entered as different lines on the expense report using different expense items which will drive the different tax applicability in Workday.

Workday General

Q: What is a worklet?
A: A worklet is another name for an application or app in Workday.

Q: How are Security Roles assigned (e.g. based on your current FMS security assigned)?
A: Security roles will be assigned, in some cases, based on your supervisory organization structure. They will also be based on current roles as well. There is no direct match between Workday and HRMS as the two systems are very different. In some cases they may overlap, such as with a manager role, but in other cases we rely on Workday's architecture in terms of role assignment. Some people may have multiple security roles assigned to them, but it really depends on the position and what needs to be accessed.

Q: Would Workday be available as an app?
A: Yes, Workday is available as an app.

Q: When you receive mail in your Workday inbox, will you be notified by email as well? How do you know you have mail?
A: You will not be notified via email when there are items in your Workday inbox. The Workday inbox is for actions you will need to take in processes that are occurring in Workday.

Q: When there is a message in the Workday Inbox, will a notification be sent to our UBC email addresses?
A: Currently, there is no notification set up to the UBC email. The idea of using Workday is you check your Workday inbox because the items there are action items that you can directly action, which wouldn't work if it was in Outlook.

Q: Inbox - if it's not connected to Outlook, does this mean we have to check this Workday inbox for requests constantly throughout the day?
A: Workday is meant to separate your Workday actions and your Outbox inbox, which is meant for UBC communication. You'll have the opportunity to use the Workday mobile app if you would like Workday notifications on-the-go. Your Workday inbox is where you initiate a process in Workday and see the outcome (e.g. approvals, etc.).

Q: Will the server hosting the cloud be located in Canada or the US?
A: UBC's Workday tenant will be hosted in Canada at an Amazon Web Services facility.

Q: Where is workday.com data stored? Is it guaranteed Canadian data residency or is our data stored in the US or somewhere else?
A: Data must be stored in Canada. Workday is being hosted on Amazon Web Services in Montreal.

Q: Is Amazon's service, while held in Canada, strictly only kept in Canada given that Amazon is owned in the USA? Is there any chance that our info will also get out of our country?
A: Workday and UBC are working under strict FIPPA guidelines for data sovereignty requirements. The same process is in place for Canvas Learning Management system used by faculty and students across the university. Canvas is also hosted in a similar fashion and adheres to strict FIPPA guidelines.