## Workday for Managers – Frequently Asked Questions

UBC is implementing a new human resources and finance system called Workday. Workday will go live November 2, 2020. To help you prepare for go-live, below are a few Frequently Asked Questions with more information about Workday.

**Payroll:**

| Question | Answer |
|---|---|
| What is the difference between the Pay app and the Payroll app on the homepage? | The Pay app is for viewing personal pay slips. The Payroll app is related to the central payroll team. Keep in mind that different users will have different apps available on their home page based on security roles in Workday. |
| How do you get payroll access when required? | Individuals with the role Cost Center Financial Analyst will have access to payroll. This role is assigned at the Cost Center, so you are encouraged to speak with your department administration. Additionally, if you are supporting a PI on a grant, if you have signing authority on a grant, you will be able to see the specific employee against the ledger account. |
| In current state, we hire some employees on a per period basis, as opposed to a monthly/hourly salary. Can we still do this in Workday? | In Workday, you will need to hire the employee based on an hourly or salary rate. However, we have created a 'Magic Mathematical Tool' that will allow you to input the total period salary, dates of hire, and the calculator will math out the monthly salary rate. |

**Invoicing:**

| Question | Answer |
|---|---|
| Are invoices sent to funders for specific contracts/funding made available on Workday? | Yes, invoices will be available in Workday; invoicing will be centralized in Research Finance and will be sent from Workday, except for non-Canadian invoices that will be sent outside of WD. |
| With multiple cheques per deposit, can you delineate the different invoices, or is there only one space for invoice #? | Where the payment received is in relation to invoices, those invoices can be referenced in the memo field of the 'Cash Sale Event'. Eventually it is anticipated that 'invoicing departments' will be using the Customer Accounts functionality, rather that the Cash Sales functionality. |

**Travel & Expense Delegation**

| Question | Answer |
|---|---|
| Is delegation for travel and expenses available in Workday? | Yes, delegation to initiate expense reports and to approve expense reports is available. Users can set up their own delegates and these delegations can specify a start and end date. Once a delegater assigns a delegate to initiate expense reports, the delegate will be able to see the delegater's UBC credit card transactions and mobile expenses. |

**Uploading Expenses:**

| Question | Answer |
|---|---|
| How can we reconcile expenses charged on corporate credit card that belongs to personal expenses in Workday? | Corporate credit card transactions can be marked as a Personal Expense. Doing this will indicate that the amount needs to be recovered by UBC. Please be reminded that the corporate credit card should not be used for personal expenses. |

## What do I need to do to prepare?

- Ensure you know and adhere to go-live deadlines
- Complete applicable training in advance of go-live
  - Workday Basics: to learn how to navigate the Workday online environment (~45 minutes)
  - Workday for Managers: to learn about team management, review and the approvals process. (~60 minutes)
  - Workday Reporting Training: to learn about key reporting features in Workday (~45 minutes)
  - Workday HR 101 for Salaried Staff: to learn about onboarding, absence and benefits.(~90 minutes)
  - Finance 101 – Basic Expenses: to learn about Workday's Foundation Data Model and basic Travel and Expense Management.(~60 minutes)
  - Finance 201 – Complex Expenses & Cust. Accounts: to learn how to submit complex expense reports, including reconciling VISA card expenses, per diems and delegating quick expenses. (~90 minutes)
  - Finance 301 – Procurement, Receiving, & Supplier Invoices: to learn submitting purchase requisitions, purchase orders, change orders, requesting a supplier setup, invoice coding and reviewing and more. (~90 minutes)
  - Join relevant webinars in advance of go-live for additional topic-based support
- Encourage your teams to take the training and complete training before November 2
  - Workday Basics: to learn how to navigate the Workday online environment (~45 minutes)
  - Workday HR 101 for Student and Hourly Employees: to learn about key HR concepts in Workday (~60 minutes)
  - These courses include the following tasks (reference guides linked):
    - Entering time
    - Requesting an absence
    - Viewing and updating personal information
    - Updating emergency contact
    - Viewing and updating payment and tax elections
- Local HR administrators are able to extract a completion report for these courses to track completion rates and encourage participation.
  - Reports are available using a 908 query in HRMS:
    - Use code **WDB** for Workday Basics
    - Use code **HR101H** for Workday HR 101 for Hourly Staff
  - For more information, please email Workplace Learning at support.wpl@ubc.ca
- 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.

- Real-Time and Accessing Data
- Notifications
- Management (Funds) – Expense Reporting | Financial Reporting and Review
- Procurement
- Internal Sales
- Review & Approvals
- Recruitment
- Time Tracking | Requesting Absence
- Supervisory Organizations (SupOrg)

## 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.