

Workday for Manager Overview

UBC is implementing a new human resources and finance system called Workday, with a vision of streamlining processes and creating a collaborative work environment for faculty, staff and students. Workday will go-live on November 2, 2020.

After go-live, managers who have direct reports will automatically be assigned a 'Manager' security role in Workday. This role gives them responsibility for making decisions on hiring, performance and termination for their team as well as one-over-one approval on some financial transactions.

IMPORTANT NOTICE: ⚠

Starting in November, students and hourly staff will be paid on the 15th and last day of each month, in alignment with how salaried staff are paid at UBC today. [Ensure you know and adhere to go-live deadlines.](#)

Here are the **top five changes** you will see with the new system, and how you prepare for Workday.

What are the Top 5 Changes with Workday?

1

APPROVALS

- Managers who currently approve transactions (e.g., vacation, hourly timesheets, and expense reports) will now **review** and **approve online**. This offers **transparency** into past and outstanding approvals.
- It is important to **take timely action** to complete review and approvals.

2

NOTIFICATIONS

- On the Workday home page, the Workday inbox will display items to be actioned and completed.
- Users can adjust their Workday settings to **receive a notification in their UBC email (FASmail) account** letting them know an action is required of them in Workday. However, you will need to log in to Workday to view the task details and take action in a timely manner.

3

MANAGEMENT | PEOPLE AND FUNDS

- Managers can see **the employees who report to them** (Supervisory Organization – SupOrg) in an org chart view, as well as their job history and job details etc.
- Managers can use the [Foundation Data Model \(FDM\) Crosswalk tool](#) to **cross-reference current DeptID** with the **new cost centres**, as well as any speedcharts and P/G codes.
- Managers will be responsible for:
 - **People management:** Supervising direct reports (leave, time submission, etc.)
 - **Fund management:** Overseeing revenues and expenses (compensations, etc.)
- An employee can be assigned to a matrix organization, which has two SupOrg Managers. This gives each manager the ability to view the employee's work history.
- For approvals, the SupOrg Manager is the first approver, and then Workday automatically routes the request to the Matrix Manager. Both managers will need to approve to complete the approval process.

4

STAFF ONBOARDING | ROLE-BASED ACCESS

- The onboarding process will now be done online in Workday; for example, entering personal data, enrolling in Benefits/Pensions (as applicable), adding banking information. Any departmental specific onboarding is still done outside of Workday.
- UBC-mandated training is part of the Workday onboarding process.
- When people are hired into positions, they gain the access and approval rights attached to that position automatically.

5

DELEGATION

- Managers may delegate tasks **for a specific period of time** while out of the office temporarily. It is possible for Managers to delegate a task for an **indefinite period of time** in rare cases as needed.
- Delegation does not transfer your accountability to the appointed delegate—it only allows someone to act on your behalf to perform the assigned task.

What's Not Changing?

- Department specific training will still be done as it is today, outside of Workday (e.g., lab safety).
- Your responsibilities as a manager of people and funds are not changing.
- Workday is a tool to store information, but you will need to continue having offline conversations with your direct report/s (for instance, agreeing on a return date in the event of a Leave of Absence or work delegation).
- Your responsibilities for the effective utilization of funds, adherence to UBC policies and use of core applications integrated with Workday (e.g., Hyperion) will remain the same.

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.