Key Workday Information and Dates

Workday, which replaces HRMS and FMS, goes live November 2, 2020. PeopleSoft will no longer be available after this date.

This note summarizes key resources, changes and finance timelines to assist you with the transition to Workday.

Training

If you are a staff member who has grant PG signing authority, you should have been invited by IRP to training called "Workday Budget Owner" if not please contact your HR Manager.

If you are a PI with support staff you should take the 'self-serve' training outlined below. Faculty members will also receive an email offering the opportunity to receive in-person training; faculty who do not have support staff may wish to sign up for this additional training.

All staff and faculty should take:

- Workday Basics: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-wdb

All faculty and staff who manage people should take:

- Workday for Managers: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-wdm

All faculty and staff who need to:

- Submit an expense claim should take Workday Finance 101: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-fin101

- Reconcile credit card expenses, foreign currency expenses, international travel, per diems, and delegating expense reports should take Workday Finance 201: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-fin201

- Order supplies should take Workday Finance 301: https://wpl.ubc.ca/browse/irp-training/courses/wpl-irp-fin301

Quick Reference Guides / Job Aids

This link to quick reference guides (aka job aids) has instructions on how to complete specific functions in Workday. It will be helpful before and after go-live. https://blogs.ubc.ca/ubcworkdayjobaids/

Key Deadlines in Preparation for Workday

HR Deadlines

September 18

- Posting new faculty positions on UBC Careers - finalized postings should be sent to the HR team by this date

September 24

- Updates to PAT balances and vacation requests – employees and managers should enter directly in PAT by this date
- Changes to employee self-service (address and personal details on HRMS) - employees should make these changes directly in HRMS by this date

September 30
- Reappointment and appointment processing in HRMS (including terminations, FTE changes, promotions, etc.) - all paperwork including signed offer letters, reappointment forms, requested documents should be sent to the HR team by this date

October 23

- Posting for staff positions on UBC Careers (including M&P and tech staff requiring posting to reappoint) - approved JDs and posting information should be sent to the HR team by this date

October 28 – 12pm

- Timesheets for hourly pay period of Oct 15 - Oct 31 - please send directly to payroll for processing by this date/time

Finance Deadlines

https://irp.ubc.ca/resources/preparing

These dates are subject to change. Please check back to this website periodically.

October 9

- Deadline to submit

    o E-procurement requests for PO/Change Orders

    o PO invoices

    o Vendor creation/changes

    o New research PG creation

October 14

- Deadline to submit manual travel/entertainment expense claims, non-PO invoices (T/Q req), and manual JVs

October 16

- Deadline to submit OPT expense claims, and payments received for grants to research finance

October 22

- Deadline to approve OPT expense claims and non-PO invoices

October 23

- Deadline to submit cash or cheque deposits for processing

Key Changes

- Nomenclature for key items like PGs and Dept IDs will change. See the enclosed slide regarding new names for items.

- Chartfield numbers for all PGs other than research grants will change. You can find your new worktag number = PG number here:

  https://finance.ubc.ca/peoplesoft-chartfield-workday-fdm-worktags

- Requests for your approval of HR and financial transactions will be in your Workday inbox, not in your Outlook email inbox. You can configure your Workday settings to receive an email in your UBC email Outlook inbox when something comes into your Workday inbox. If you use a non-UBC email account, you will have to set up forwarding from your UBC account. (More details will follow on this)

- You can delegate a task (e.g., approve a specific employee expense) or a function (e.g., all employee expenses) or the entire contents of your Workday inbox.

- Credit card expenses will be reconciled within Workday.

- The concept of "PG signing authorities" does not exist within Workday. If there are multiple "Grant Managers", every Grant Manager will get the same notice to approve an HR or Finance transaction. Once we go live you may want to add or delete Grant Managers in order to meet your lab's needs.

- BCCA Faculty: do not delete your Fin Admin's as grant managers.

- After go live you can assign the Grant Financial Analyst role to support staff. This role will allow the individual to see the budget and actual expenses but not the payroll details. This is a view only role and does not allow approval.

- Vacation tracking and approval for all staff will now be through WorkDay.

- Hourly employees: hours are tracked within Workday. PIs or timekeepers need to approve the hours every two weeks for the employee to be paid. Hourly employees will be paid on the 15th and last day of the month. Approval of hours will be one week before the pay period.

FDM Elements Similar To Existing Chartfields

PeopleSoft		Workday
Business Unit	>	Company
Fund	>	Fund
Dept ID	>	Cost Center
Project/Grant (PG)	>	Program *or* Project *or* Gift *or* Grant *or* Gift Initiative
Program Code	>	Program *or* Activity
Account	>	Ledger Account + Revenue Category *or* Spend Category