

INTEGRATED RENEWAL PROGRAM

Workday Wednesday

Self Service & Basic Workday Terminology

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Carri Lawrence, Okanagan Transformation Director

Lauren Hatchard, Change Management Analyst

Ashley Bloor, Subject Matter Expert

Erin Shannon, Business Lead, Student Records and Advising



TODAY'S OUTLINE



Workday at UBC



Self Service Demo
Common Workday Terminology



Upcoming Activities and Engagements



Discussion and Q&A



WHY WORKDAY?



A **new set of tools** to replace 25 year-old institutional systems which have reached end of life.



A **better user experience** for faculty, staff and students – anywhere, anytime.



Streamlining administrative processes to make our work **easier and faster**.



Real-time data and reporting for effective decision making and more transparency.

WHY WORKDAY?

Brock
University

UNIVERSITY OF
WATERLOO




workday®

UNIVERSITÉ
McGill

Langara.

Yale

LSU



THE OHIO STATE UNIVERSITY

ASU Arizona State
University

WHAT IS IN SCOPE?*

APRIL 2020



STUDENT

- Admissions (Undergraduate)
- Assessment Outcomes
- Curriculum Management (limited)
- Enrolment
- Graduation
- Learner Financial Management
- Learner Financial Support
- Learner Management
- Program Planning and Management
- Progression
- Registration
- Scheduling
- Transfer Credit



HUMAN RESOURCES

- Benefits
- Compensation
- Core HR Management (incl. Onboarding/Off-boarding)
- Payroll
- Talent Acquisition
- Workforce Management – Time & Attendance



FINANCE

- Budget Development (core to Workday)
- Capital and Asset Accounting
- Endowment Accounting (UBC Methodology)
- Forecasting (Workday Planning)
- Institutional Accounting
- Procure to Pay
- Research/Post Award Grants Administration
- Revenue Accounting
- Treasury and Cash Management
- Travel and Expense

*Scope areas listed have budget approval. This is a multi-year program and new functionality will be introduced to meet UBC's evolving needs in subsequent years.



SUPPORTING THE CHANGE: TRANSITION NETWORK



**Building strong
relationships
between units and
IRP**



**Support
localization of the
change**



**Leading and
facilitating the
transition within
home units**



**Share learnings,
practices &
resources across
units to support
transition**

WORKDAY DEMO: SELF SERVICE



WORKDAY TERMINOLOGY

TENANT

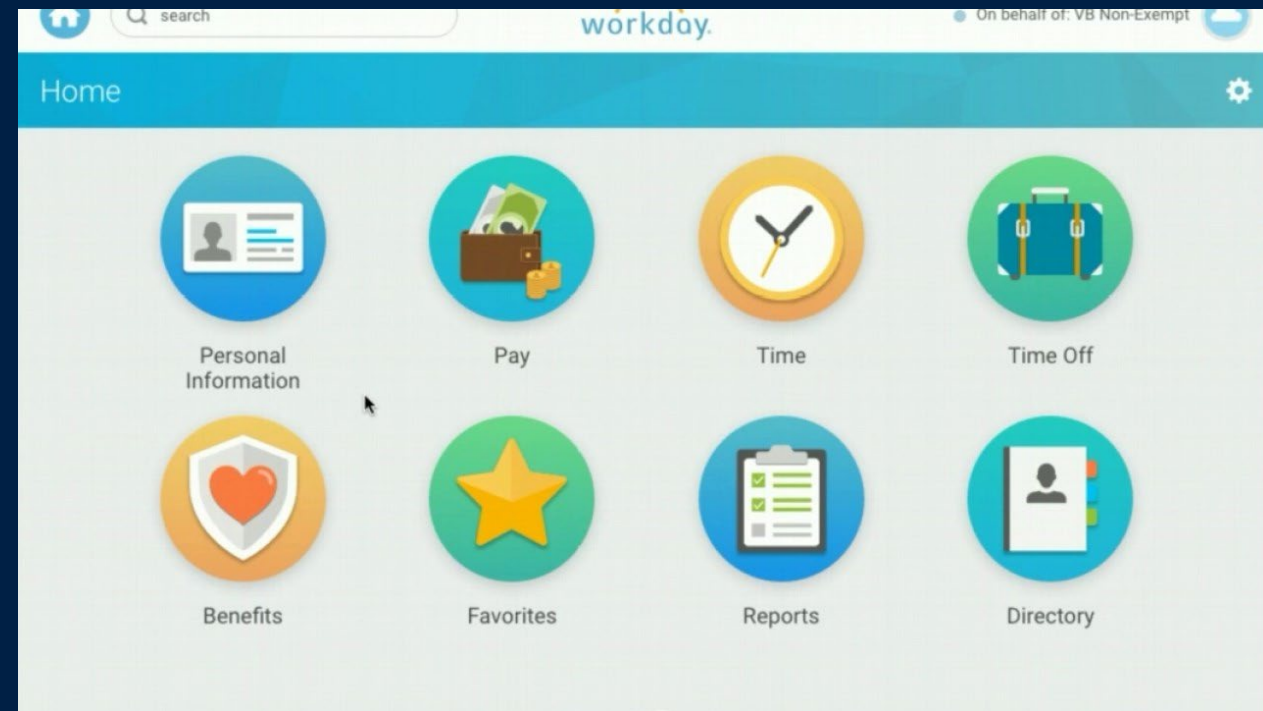
Workday's term for UBC's "instance " of Workday



WORKDAY TERMINOLOGY

EMPLOYEE SELF SERVICE

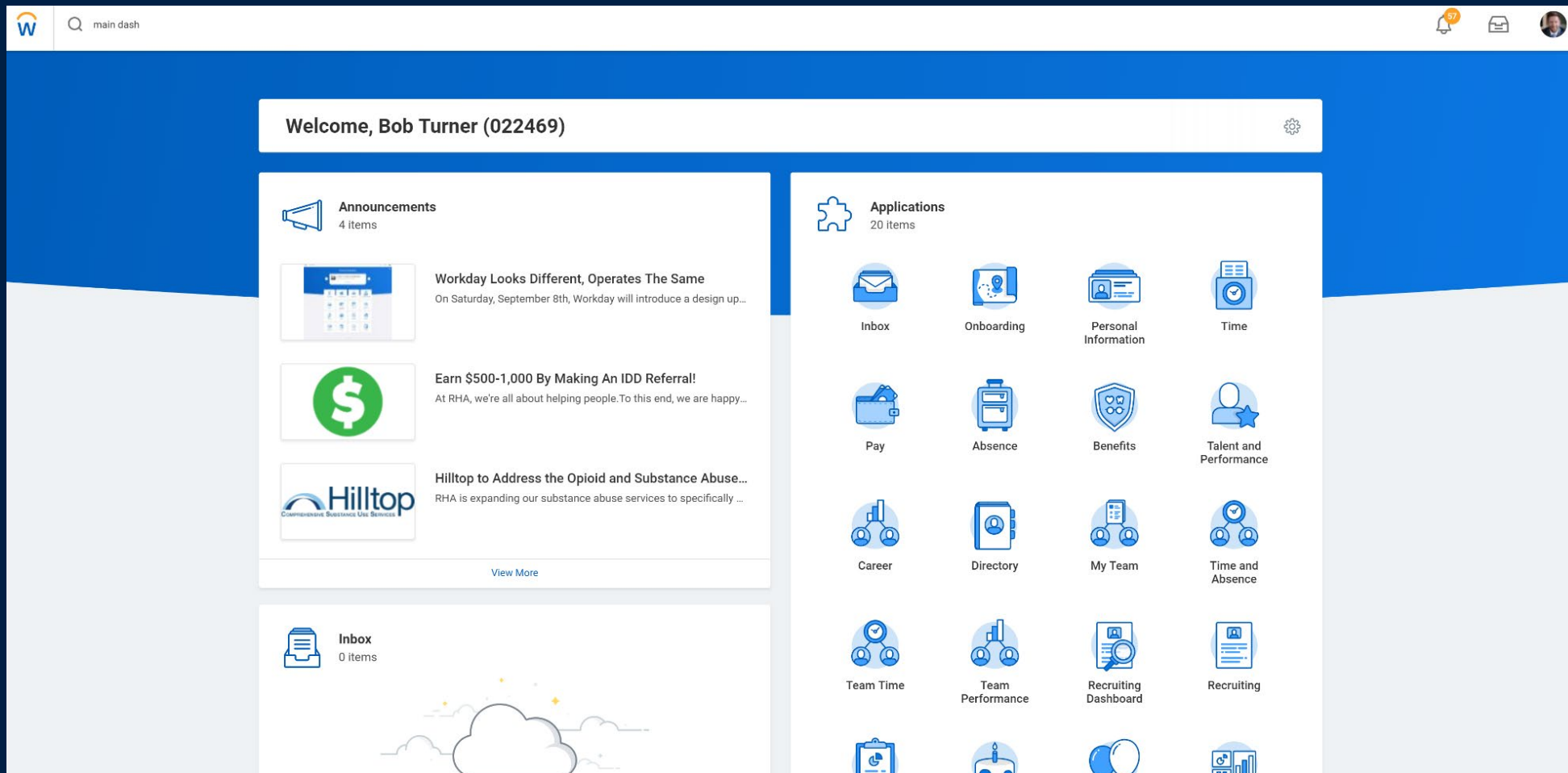
Shows personal information, benefits, emergency contacts, career information.



WORKDAY TERMINOLOGY

WORKLET

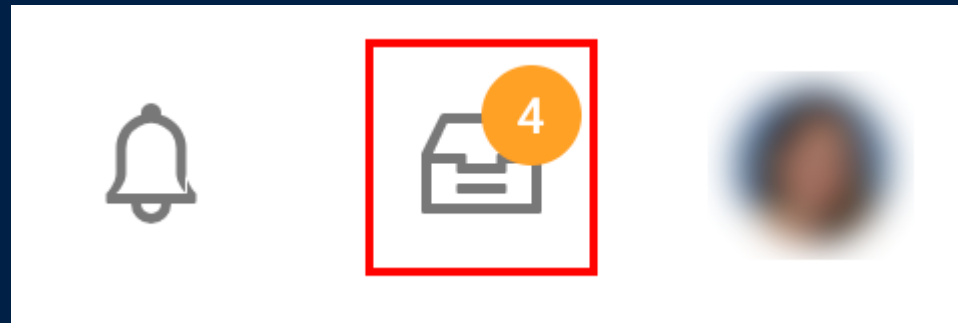
Found on your Workday Homepage that makes it easier to access information needed on a routine basis.



WORKDAY TERMINOLOGY

WORKDAY INBOX

A list of items that require you to take action on.



WORKDAY TERMINOLOGY

NOTIFICATIONS

FYIs ONLY



WORKDAY TERMINOLOGY

SECURITY ROLES

Determines what workers can do and see in Workday

Different security roles exist for HR, Finance and Student

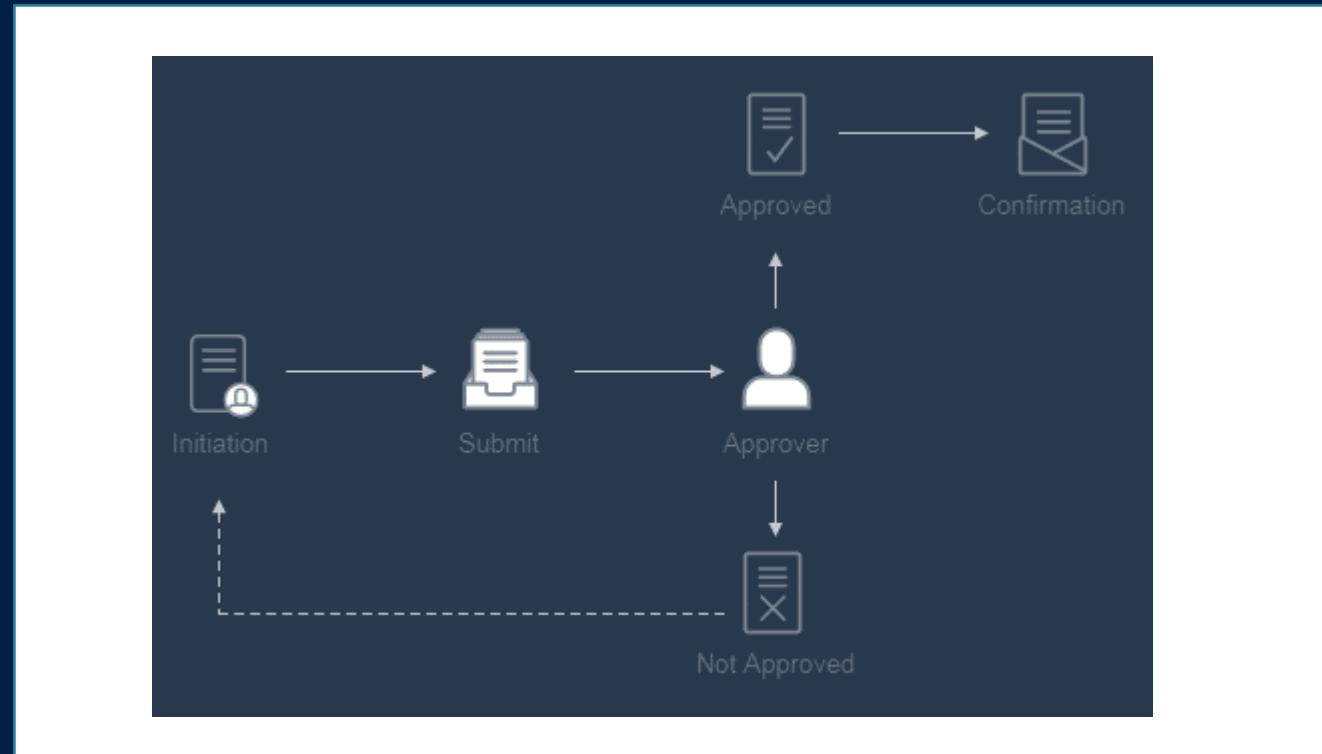
Examples: Cost Centre Manager, HR Manager, Finance Director, HR Analyst, Recruiter



WORKDAY TERMINOLOGY

BUSINESS PROCESS

Sequence of tasks to accomplish a business objective.



WORKDAY TERMINOLOGY

HCM OR HUMAN CAPITAL MANAGEMENT

Includes employee self service, payroll, benefits administration, and personnel administration.



WORKDAY TERMINOLOGY

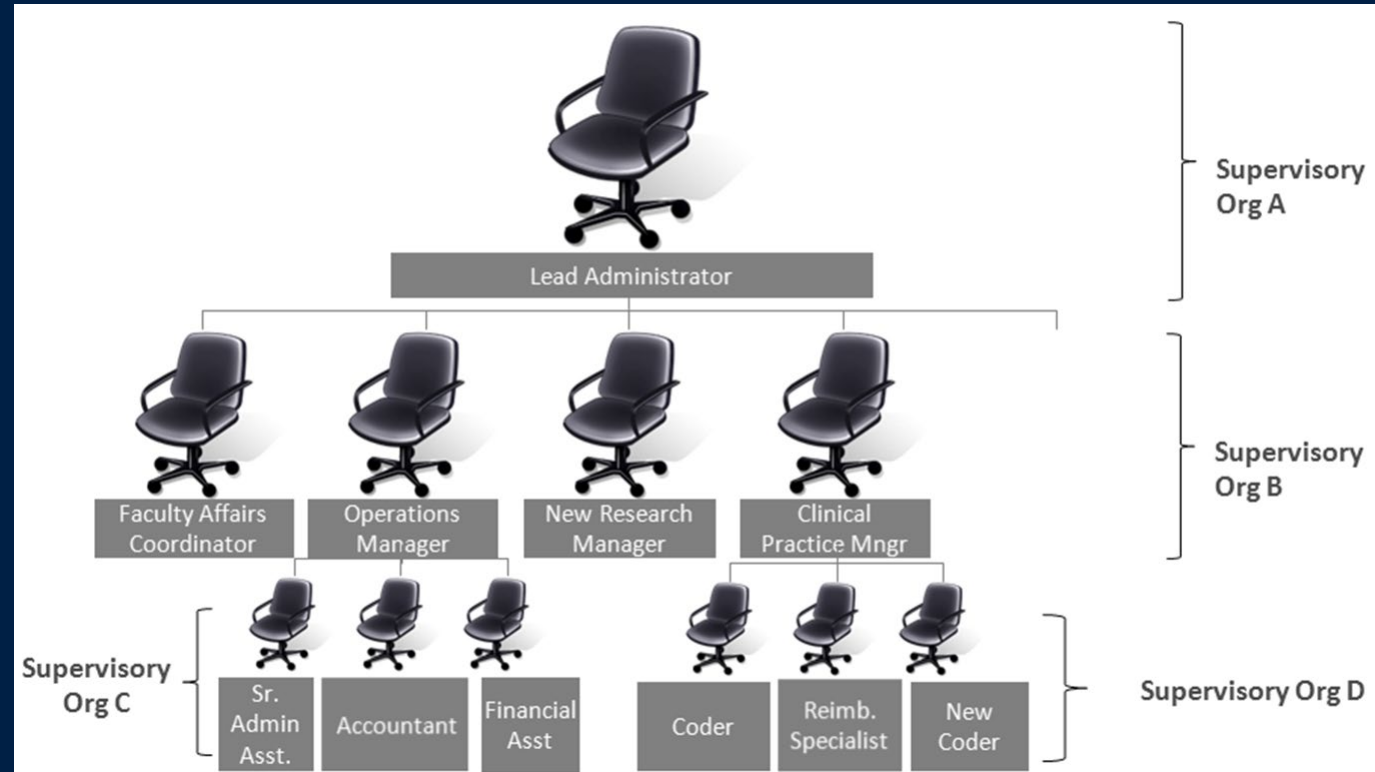
SUPERVISORY ORGANIZATION

Groups employees reporting to the same manager into the same supervisory organization.

Are NOT used to manage financial responsibilities

All employees are hired into Supervisory orgs

UBC has 100's of these.



WORKDAY TERMINOLOGY

ACADEMIC UNIT

Offers and maintains programs/pathways and administers and maintains courses

They can recruit prospective students, admit students, offer program of study or courses, or administer financial aid.

They are used to manage academic appointments
Academics have both an academic appointment in an academic unit and a position/job in a supervisory org



WORKDAY TERMINOLOGY

CANDIDATE HOME

External applicants can choose to set up an account with an ID and password in order to search for jobs, apply and track them.



WORKDAY TERMINOLOGY

JOB REQUISITION

The page that contains details of a job posting.



WORKDAY TERMINOLOGY

FDM OR FOUNDATIONAL DATA MODEL

- Is the backbone for finance transactions;
- Design of the FDM is core to generating cleaner data
- Impacts the entire Workday platform as HR, Finance and Student share the same components



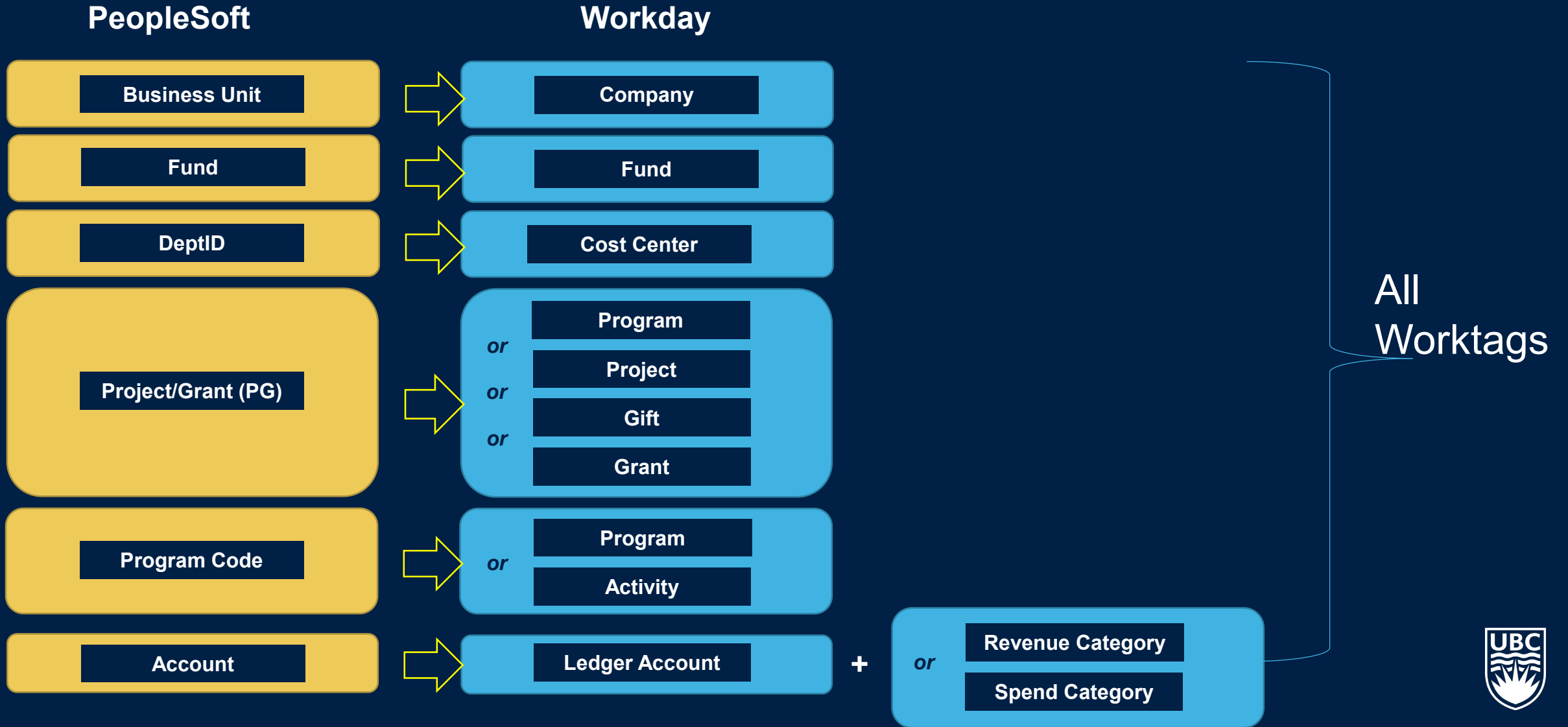
WORKDAY TERMINOLOGY

WORKTAGS

- Classifies transactions for financial, operations or external reporting; They are like Hashtags used in Social Media; Ex. Grant, Program, Supervisory Organization, supplier, employee



WORKDAY TERMINOLOGY - WORKTAGS



RELATED WORKTAGS

Primary/Driver Worktag	Related Worktag		
	Cost Center	Fund	Function
Gift	X	X	X
Grant	X	X	X
Project	X	X	X
Program	X	X	X
Cost Center		X	X

- The primary/driver worktag will work in a similar way to SpeedCharts.
- Related worktags will automatically populate based on the primary/driver worktag... the last one entered overrides all previous entries.



WORKDAY TERMINOLOGY

SPEND CATEGORY

Worktag used to categorize “SPEND” activities in Workday. Will replace FMS expense account codes and help drive tax rules. Ex. Office Supplies, Meals,.

REVENUE CATEGORY

Worktag used to categorize “REVENUE” activities in Workday. Will replace FMS revenue account codes. Ex. Tuition Fees, Events and Admission revenue.

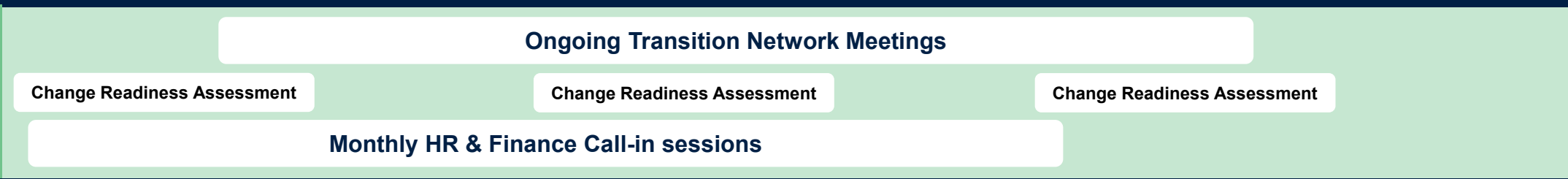


UPCOMING ACTIVITIES AND ENGAGEMENTS

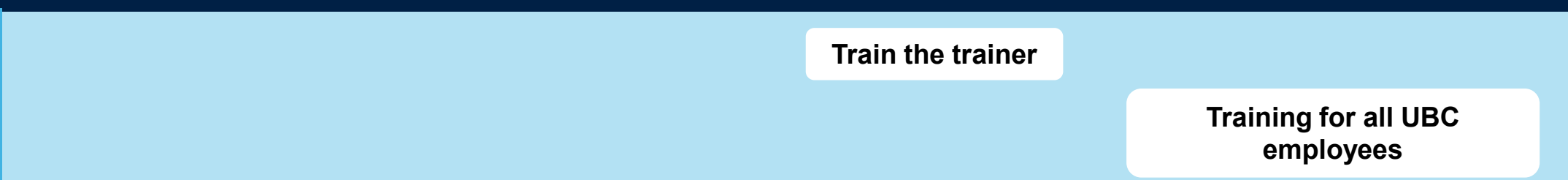
HR/FIN
Go Live



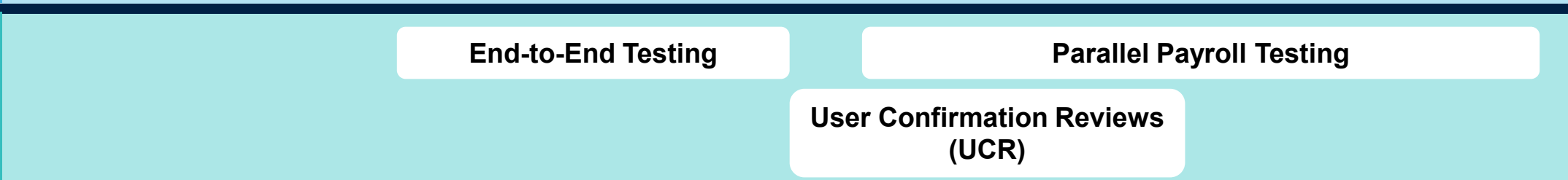
Adoption & Sustainment



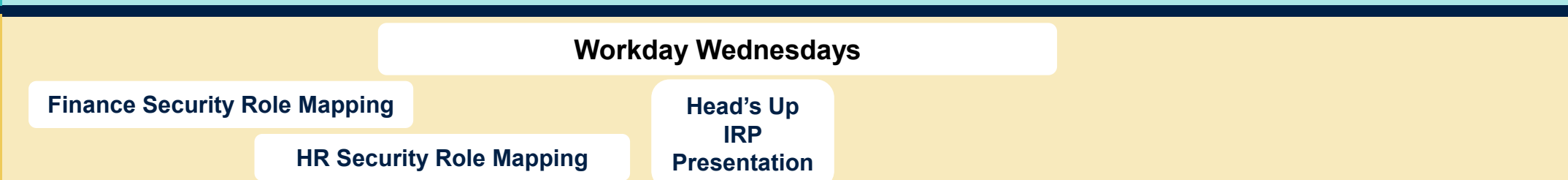
Training



Testing



Additional Activities



Timelines on this slide are subject to change.

DISCUSSION AND Q&A



Next Workday Wednesday: [Open Demo and Q&A](#)
Wednesday, July 31 | COM 201 | 12:00 – 1:00pm



IRP OKANAGAN TEAM

Want to **request** an IRP presentation for your unit? Have **questions**?

Get in touch with us!

Materials available from UBC Okanagan IRP website:

<https://finance-operations.ok.ubc.ca/irp-okanagan/>

Carri Lawrence | carri.lawrence@ubc.ca

Lauren Hatchard | lauren.hatchard@ubc.ca

Ashley Bloor | ashley.bloor@ubc.ca

Erin Shannon | erin.shannon@ubc.ca

