INTEGRATED RENEWAL PROGRAM

UBCO Security Role Session: New Process for Submitting Requests

March 16th, 2021

AGENDA

1 New Security Role Request Template and Process

2 Security Role Definitions

3 Contacting the ISC

4 Questions

SECURITY ROLE REQUEST TEMPLATE AND PROCESS – EXCEPT FOR GRANTS

INFORMATION REQUIRED BEFORE YOU START

*** The security roles shown in this deck are tied to **Positions** and not the Employee. If someone moves from one position to another there is no need to request changes to the Employee's access. Old access is automatically removed and new access given once they move to new Position. ***

- ✓ Type of change (add/remove)
- ✓ Employee name and ID
- ✓ Position ID and title
- ✓ Reason for request. These are provided in the template.
- ✓ Finance/HR role requested. These are provided in the template.
- ✓ Organization reference ID (Worktag ID, such as Cost Center, Program, Grant number etc.
- ✓ Supervisory Organization number and name.

*** All new Positions created receive "employee as self" functionality automatically. Anything other than this MUST be requested through this template for that Position!

HOW TO FIND WHICH SECURITY ROLES HAVE BEEN ASSIGNED

There are a few ways to go about this…

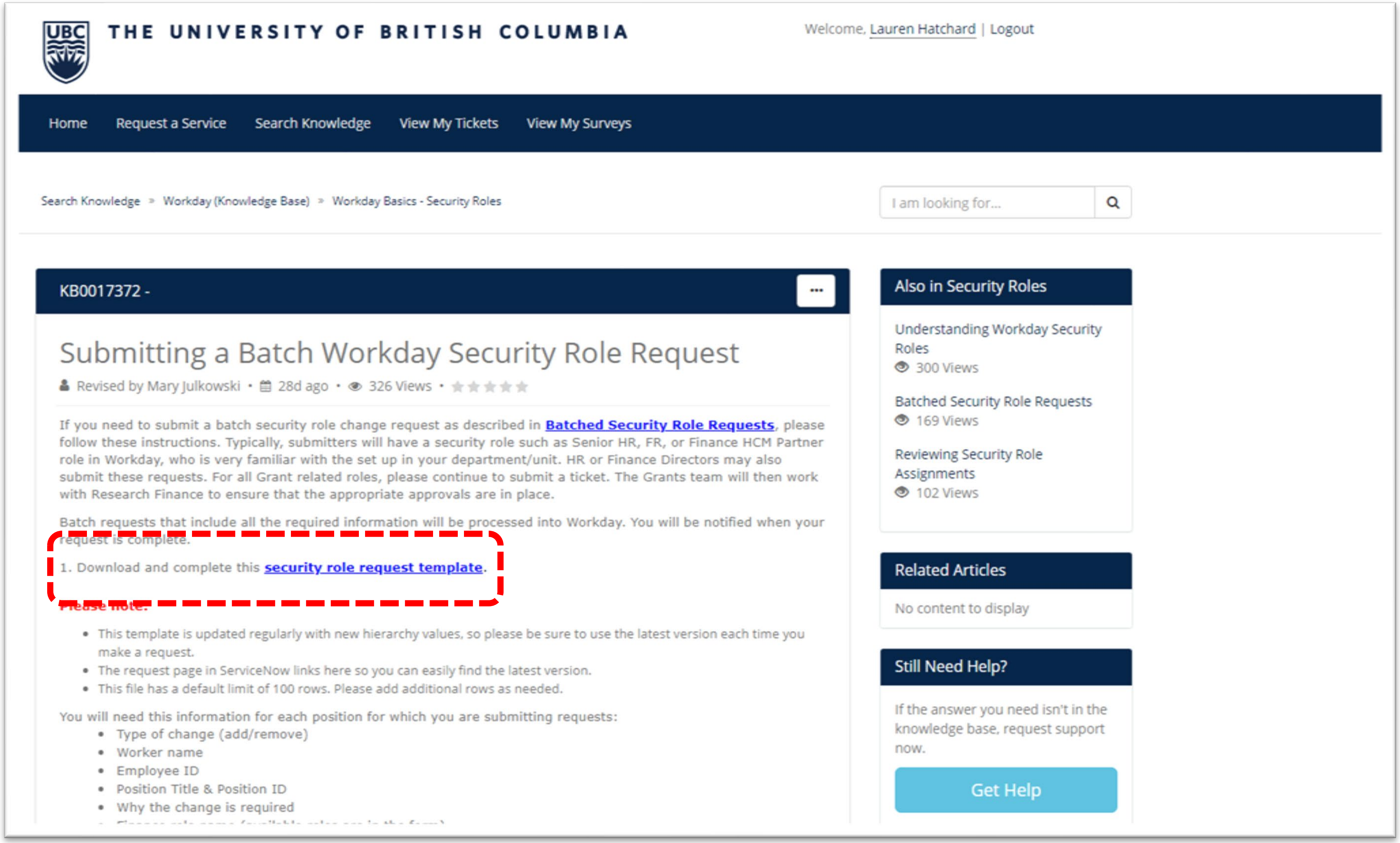
- ✓ Run the report **'Worker Role Assignments by Organization'**
  - ✓ Enter 'UBCO' in the first field, and then you can select whether you want to see all Cost Centers you have access to, Sup Orgs, etc.
  - ✓ This will show you who has been assigned which roles for each of these orgs.

- ✓ Run the report **'Role Assignments for Worker Position'**
  - ✓ This report only shows the security roles assigned to an individual worker. Not the best option if you want to see multiple employees at once.

- ✓ Search for the Sup Org, Cost Center, etc. in Workday and click on the 'Roles' tab
  - ✓ This will show you all security roles assigned to this particular organization and who holds these roles.

NEW SECURITY ROLE REQUEST TEMPLATE

DO NOT USE THIS TEMPLATE FOR GRANT SECURITY ROLE REQUESTS



1. Go to isc.ubc.ca and search for ‘**Submitting a Batch Workday Security Role Request**’
2. Click the link to download the security role request template
3. Complete template and send to your Finance Manager for approval

COMPLETING THE SECURITY ROLE TEMPLATE

DO NOT USE THIS TEMPLATE FOR GRANT SECURITY ROLE REQUESTS

Finance Director = your Finance Manager. You will need to ensure your Finance Manager is aware of, and approves, all Finance role requests for your unit.

This template is updated regularly. Be sure to download the latest version at the link provided.

Finance roles must have approval from the Finance Director to be provisioned. HCM requests must be submitted by someone holding an HR security role in Workday. Columns A - F are mandatory.
For Finance roles, columns G-J must also be populated, and for HCM roles, columns K-M are required.

Faculty or Unit: ____________ (if more than one, list them all)

	Name	Approved?
Finance Director		
HR Submitter		N/A

Before you start, are you using a saved copy of this form? Please login to the self-service portal at https://ubc.service-now.com/selfservice.
Then get the latest copy here (copy and paste link for best results).

Add as many rows as required

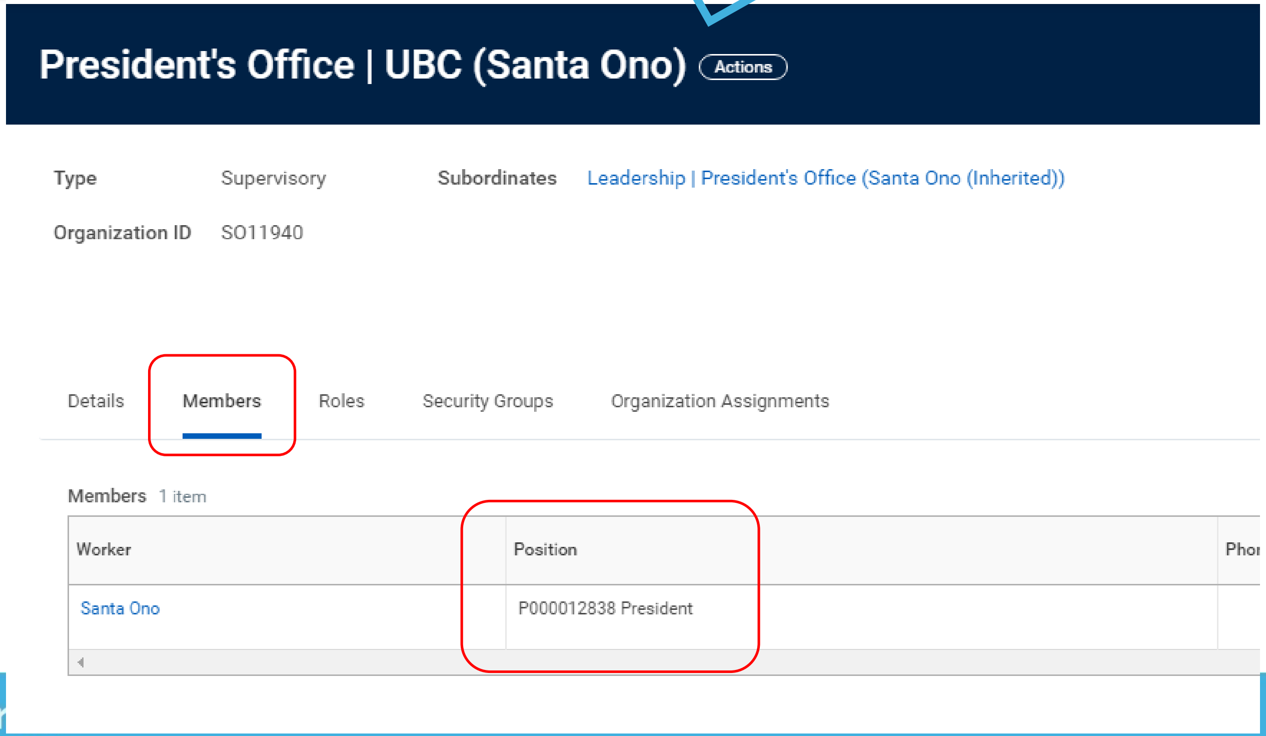
Position Details						Finance Secu	
Type of change	**Worker Name**	**Employee ID**	**Position**	**Position ID**	**Requirement for the role (If applicable)**	**Finance Role Name**	**Eligible Organization Type for Ro**
Are you adding or removing a role assignment? **Please pick from the drop-down menu.**	Provide the name of the Worker that this role should be assigned to.	What is the person's employee ID?	What is the position of the person being mapped against this role?	What is the position ID of the corresponding position?	Why is this change required?	Please pick from the drop-down menu. Review role definitions here.	Which level of the hierarchy does the role need to assigned to? **This cell automatically populates the required organization type based on the you have selected in column F.** Please refer to information and add the organization ID for the rol are assigning in column I.

COMPLETING THE SECURITY ROLE TEMPLATE

DO NOT USE THIS TEMPLATE FOR GRANT SECURITY ROLE REQUESTS

Add as many rows as required

Position Details					
Type of change	**Worker Name**	**Employee ID**	**Position**	**Position ID**	**Requirement for the role (If applicable)**
Are you adding or removing a role assignment? **Please pick from the drop-down menu.**	Provide the name of the Worker that this role should be assigned to.	What is the person's employee ID?	What is the position of the person being mapped against this role?	What is the position ID of the corresponding position?	Why is this change required?
EXAMPLE: Remove	John Smith	123456	Manager	P00123456	Reorganization
EXAMPLE: Add	Juanita Brava	123456	Manager	P00125698	Missing role blocking BPs



To find the Position ID, search for the employee in Workday and find their Sup Org. Click on 'Members'.

COMPLETING THE SECURITY ROLE TEMPLATE

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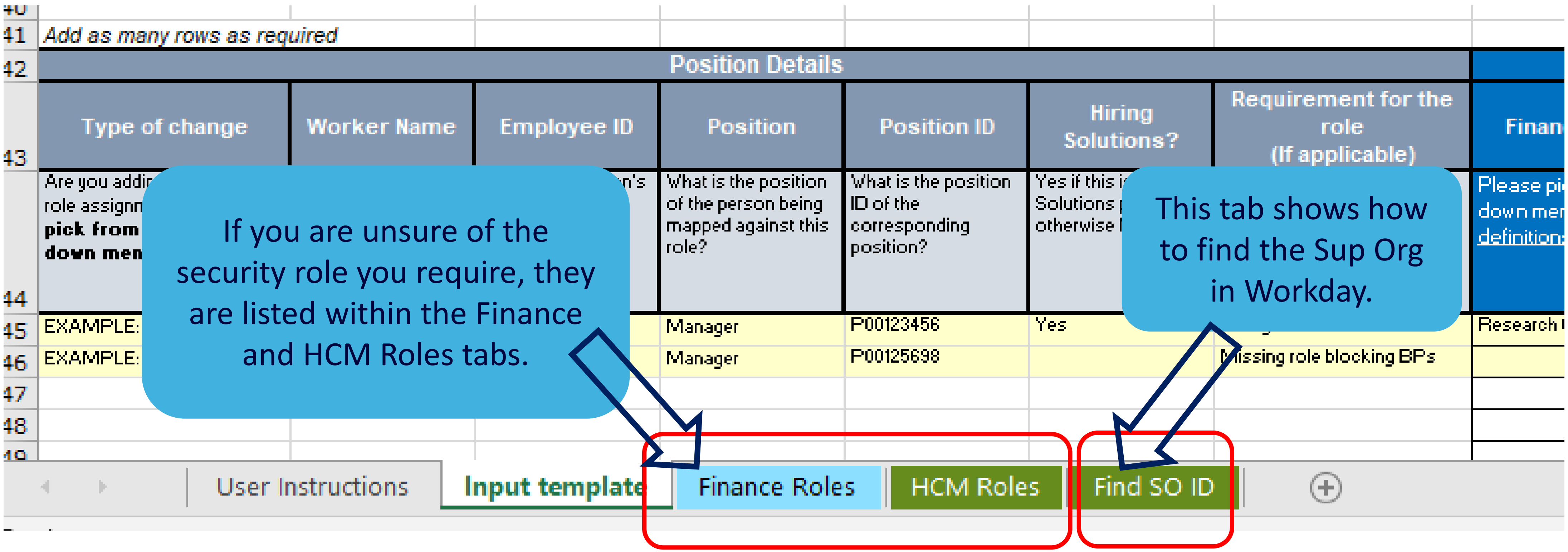
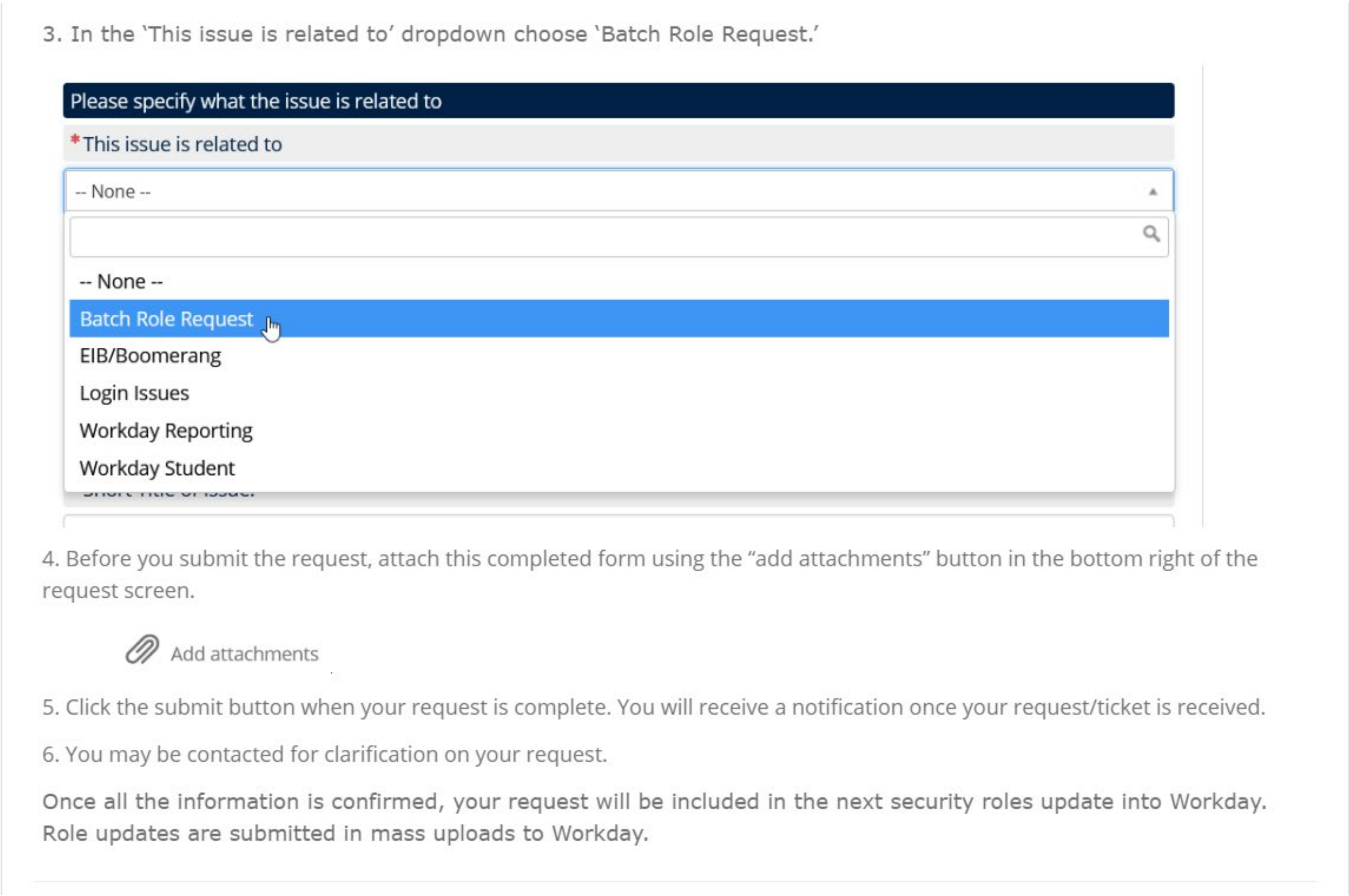


SUBMITTING SECURITY ROLE REQUEST

DO NOT USE THIS TEMPLATE FOR GRANT SECURITY ROLE REQUESTS


3. In the 'This issue is related to' dropdown choose 'Batch Role Request.'

Please specify what the issue is related to

*This issue is related to

-- None --

-- None --

Batch Role Request

EIB/Boomerang

Login Issues

Workday Reporting

Workday Student

4. Before you submit the request, attach this completed form using the "add attachments" button in the bottom right of the request screen.

Add attachments

5. Click the submit button when your request is complete. You will receive a notification once your request/ticket is received.

6. You may be contacted for clarification on your request.

Once all the information is confirmed, your request will be included in the next security roles update into Workday. Role updates are submitted in mass uploads to Workday.

4 Go to isc.ubc.ca and click '**Request a Service**' and **'Workday Access Help'**

5 In the 'This issue is related to' dropdown, select '**Batch Role Request**'

6 Attach your completed template and click Submit

SECURITY ROLE REQUEST TEMPLATE AND PROCESS – FOR GRANTS

GRANT SECURITY ROLES - NEW ROLE REQUEST TEMPLATE

UBCO will follow a different process to request Grant related roles. These include:

- Grant Manager
- Grant Financial Analyst
- Grant Financial Payroll Analyst

All requests for changes or additions/deletions to the above roles will need to be approved by the Principal Investigator. Documentation showing approval will be required to proceed with request.

The Research Finance Officer will then review and process security role request in Workday.

1. Go to UBCO Finance Operations and Strategies under Resources => Forms https://finance.ok.ubc.ca/reference/forms-2/

2. Click the link to download the security role request template

3. Send completed template to Grant PI to receive authorization

4. Email completed template and PI approval to ubco.researchfinance@ubc.ca for processing

COMMON SECURITY ROLES FACULTIES/UNITS CAN REQUEST

DEFINITIONS

SECURITY ROLES – ACTIONS

Actions that can be taken by various security roles:

Initiate: Start a business process

Review: Approve, Send Back or Edit a transaction

Approve: Approve or Send Back a transaction

View: View financial information for a specific worktag(s)

COMMON HR SECURITY ROLES – HR ANALYST – THE "DO'ER" ROLE

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday	Inheritance
Faculty/Unit Administrators	**HR Analyst**	Initiate HR BPs only View HR specific HR information NO APPROVALS	✓ Create position, job requisitions, and complete hire activities ✓ Create/change costing allocations for a position and/or worker ✓ View job details, compensation, time off balances, contact details ✓ Initiate absence requests, compensation changes, change job (transfer, FTE, etc.), termination ✓ Can 'add approver' for the Manager or HR Partner to approve if not already part of the approval process ✓ Act on BPs of employees in Supervisory Organizations they support ✓ Initiate student hires/job changes	✓ Initiate Human Resource BPs and see Employee data only for Sup Orgs / Subordinate Sup Orgs for which they have been given security. ✓ If access is given to all sup orgs below a sup org, this access will be inherited down until another person is assigned the HR Analyst security role. ✓ To avoid losing access to this, ISC must manually add that particular sup org to the users access.

COMMON HR SECURITY ROLES – MANAGER (APPROVER AND "DO'ER")

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday	Inheritance
Anyone who is a manager of a Sup Org will <u>automatically</u> get assigned the role 'Manager' (requests for new sup orgs is done through ServiceNow)	**Manager**	Initiate HR BPs View specific HR information Review and Approve for sup orgs they have been given security to	✓ Create, review, and approve positions and job requisitions (job postings) ✓ Create/change costing allocations for a position and/or worker ✓ Review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees ✓ Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.)	This role can initiate BPs and see employee data for the Sup Orgs they are assigned on as well as any Subordinate Sup Orgs. This role will approve BPs only for the Sup Orgs they support. Cannot initiate and approve the same BP

Important: New/existing employees moving into a Manager role of a Sup Org will need to go through the Security Role Request Template!

COMMON HR SECURITY ROLES – TIMEKEEPER

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday	Inheritance
Unionized Supervisors with responsibility for entering time/payroll hours	**Timekeeper**	Initiate HR BPs Review for sup orgs they have been given security to	✓ Can approve time entry related tasks when an employee enters their own time <u>on behalf</u> of the sup org manager ✓ Can initiate time entry related tasks on behalf of Employees for Sup Orgs which they support Time Tracking functions ✓ Manager will be required to 'Approve' time entries	This role can initiate the Time Enter BPs for the Sup Orgs they are assigned to. This role will approve BPs only for the Sup Orgs they support.

Important: Timekeeper is ***not an absence role!*** Timekeepers will not have access to review/initiate leave/absences/vacation for their Sup Org. HR Analysts and Managers have absence access for their Sup Org.

ACADEMIC FACULTY ANALYST

ADDING/UPDATING ACADEMIC APPOINTMENT

Academic Faculty Analyst can add an Academic Appointment to a faculty member.

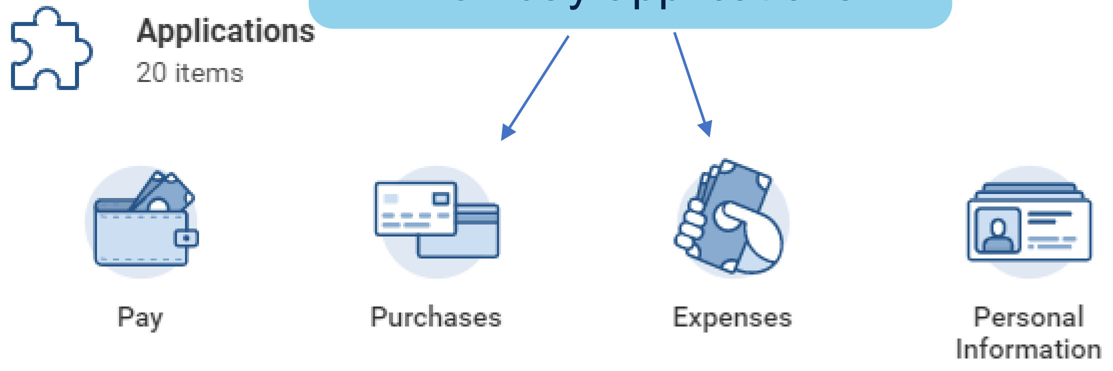
Academic Appointments enable greater visibility into a Faculty member's academic career. The sub-process will kick-off for any faculty profile that is engaged in teaching, or one that goes through a formal promotion process. Includes information such as tenure status, Academic Unit and rank.

Initiator (auto routes to the person who initiated the Hire BP)	**Review/Approve**
Academic Faculty Analyst	FR Executive

Important: The Academic Faculty Analyst security role allows the individual to see and manage Academic Appointments and Academic Units.

INITIATORS OF FINANCE TRANSACTIONS

All employees have these Workday applications



All employees have access to initiate financial transactions such as:

- ✓ Purchase Requisitions/Orders
- ✓ Receive goods or services for which they created the purchase order
- ✓ Create supplier requests
- ✓ Create expense reports

You do not need a special finance security role to perform these functions

FINANCE SECURITY ROLES – COST CENTER RECEIVER

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Administrative support	**Cost Center Receiver**	Initiate & View	✓ Can receive goods and services in Workday on behalf of other requestors in their unit ✓ Goods and services must be received in Workday before payment can be made to supplier ✓ View PO information, invoices paid on a PO, create change orders (only for the cost center they have security to)

Important: The creator of the purchase requisition is automatically assigned this role in Workday for that specific purchase order.

FINANCE APPROVER ROLES - “BUDGET OWNER”

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Budget Owners (Deans, Dept. Heads, Managers/Directors)	**Cost Center Manager**	View, Review & Approve – ability to view ALL financial information with the Cost Center and related Worktags below that Cost Center, including payroll	✓ Run and view financial information for specific Cost Center and all related Worktags below the Cost Center (i.e. Program, Grant, Gift, Project) i.e. Ledger Summary - distributed Payroll Summary – Distributed Over/Under Reports (with drill in functionality to payroll information) ✓ Approval authority for financial transaction (business processes) for specific Cost Center **AND** Worktags below the Cost Center that do not have a manager assigned
Typical UBC Position	**Security Role in Workday**	**Can they initiate, action, and/or review?**	**Examples of what they can do in Workday**
Any position responsible for a budget	**Program Manager, Project Manager, Gift Manager, Grant Manager, Gift Initiative Manager**	View, Review & Approve - ability to view ALL financial information with the Cost Center and related Worktags below that Cost Center, including payroll	✓ Run and view financial information for the specific Worktag (i.e. Program, Grant, Gift, Project) i.e. Ledger Summary - distributed Payroll Summary – Distributed Over/Under Reports (with drill in functionality to payroll information)

FINANCE APPROVER ROLE – FINANCE HCM PARTNER

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Senior Manager within unit	**Finance HCM Partner**	Review and Approve	Finance approval for HR specific business processes, such as: ✓ Job requisition ✓ Hire ✓ Add job/change job Provides an additional layer of approvals

Important: Approval by Finance HCM Partner ***is required for***: Faculty Tenure/TenureTrack/Term Appointments, Staff, Executive

Finance HCM Partner Approval ***is not required for***: Clinical Faculty (unpaid only), Post Docs, and Research Associates, Student Workers

FINANCE “VIEW ONLY” SECURITY ROLES

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Faculty/Unit Administrators	**Cost Center Financial Analyst**	View only role – without view access to payroll details (for ***cost centers*** they have been given security to)	Run and view financial information for Cost Center and all related worktags below the Cost Center i.e. Ledger Summary - distributed Over/Under Report (no drill in functionality to payroll information)
Faculty/Unit Administrators	**Cost Center Financial Payroll Analyst**	View only role – with view access to Payroll details (for ***cost centers*** they have been given security to)	Run and view financial information for Cost Center and all related worktags below the Cost Center i.e. Ledger Summary - Distributed Payroll Summary – Distributed Over/Under Report (with drill in functionality to payroll information)
Faculty support staff, lab assistants	**Grant Financial Analyst**	View access to Grant transactional information – No access to drill into payroll information	Run and view financial information for specific Grant i.e. Grant Ledger Summary
Faculty support staff, lab assistants	**Grant Financial Payroll Analyst**	View access to Grant ledger information – with view access to payroll details	Run and view financial information for specific Grant i.e. Grant Ledger Summary Payroll Summary – Distributed
Faculty/Unit Administrators	**Program Financial Analyst**	View only role – without access to payroll details (for ***Programs*** they have been given security to)	Run and view financial information for assigned Program. i.e. Ledger Summary - distributed Over/Under Report (no drill in functionality to payroll information)
Administrators/Finance Manager/Director	**Finance HCM Analyst**	View only access to HR data (needed to perform financial planning/analysis)	Data includes: ✓ Legal Name ✓ Employee ID ✓ Current status (ongoing, term, leave of absences, etc.) ✓ Position details (Start Date and End Dates, rank- i.e. Professor) ✓ Position history (Start and End Date for prior positions) ✓ FTE ✓ Compensation (salary and benefits) ✓ Compensation history ✓ Costing Allocations ✓ Position ID and Position Status

Assigned at the ***Cost Center*** level. Not assignable for lower worktags (i.e. Program, Grant)

Assigned for specific Grants

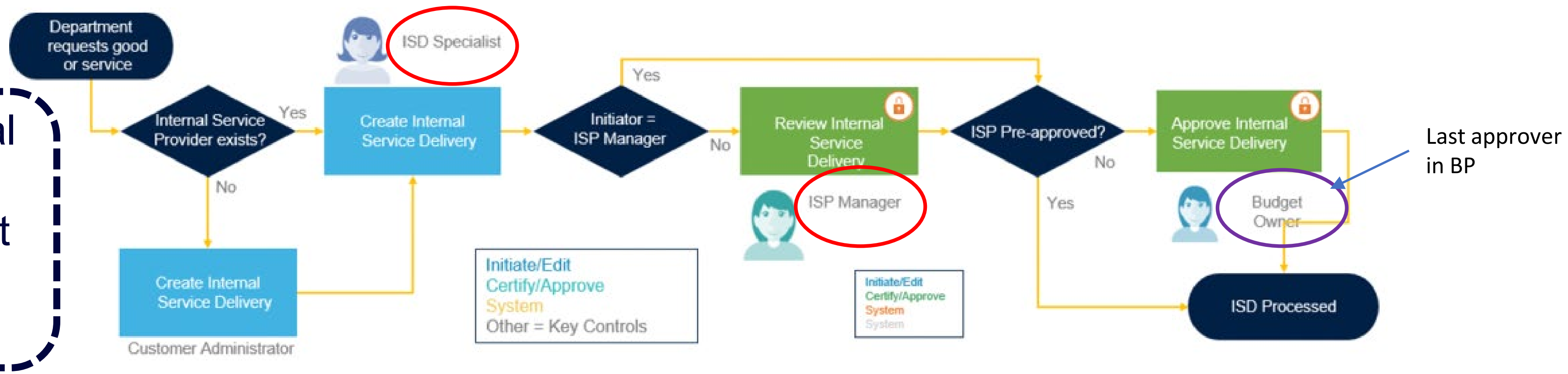
Assigned at the ***Program*** level

If HR security role is already assigned, user likely does not need this security role

FINANCE SECURITY ROLES FOR INTERNAL SERVICES

(SALE OF A GOOD OR SERVICE BETWEEN TWO UNITS WITHIN THE UNIVERSITY)

Important: The Internal Sale transaction is initiated by the unit that is ***providing the service***.



Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Administrative position	**ISD Specialist (Internal Service Delivery Data Entry Specialist)** Resides in the unit providing the service	Initiate	Create Internal Service Delivery transactions for sales between UBC units
Manager	**ISP Manager (Internal Service Provider Manager)**	Approve	Approves Internal Service transaction (this is NOT the budget owner)

FINANCE SECURITY ROLE– STUDENT EXPENSE REPORT INITIATOR

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Graduate/Undergraduate Program Assistants **Administrative Assistants**	**Student Expense Report Initiator**	Initiate	Initiate expense reports in the Workday Expenses module for student expense reimbursements

Important: This role is not assigned to a worktag (i.e. Cost Center, Sup Org). This role is assigned to 'UBC' to allow those with this role to process expense reports for any UBC student.

SECURITY ROLES HELD BY CENTRAL HR AND FINANCE ONLY

DEFINITIONS

HR SECURITY ROLES – **HELD BY CENTRAL HR**

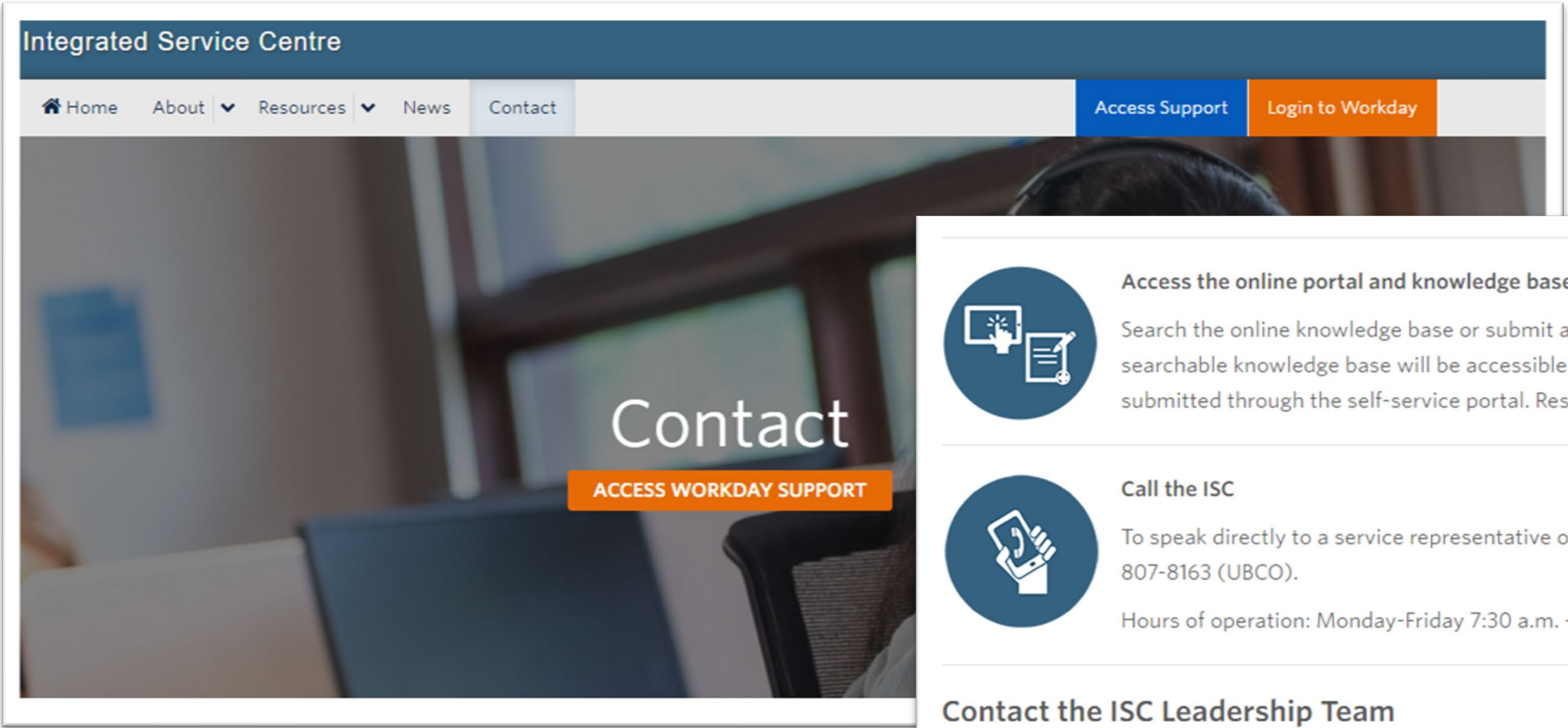
Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
UBCO Central HR Advisors and Associates	**Central HR Partner**	Initiate, Review and Approve	✓ Create, review, and approve positions and job requisitions (job postings), move workers ✓ Initiate, review, and approve hires, job changes, re-hires, add additional jobs, and terminations for employees ✓ Input, review, and approve long-term and/or temporary compensation changes, job data changes (e.g. FTE, employment dates, etc.) ✓ Act on BPs of employees in Supervisory Organizations they support
	FR Executive	Review and Approve	✓ Review and approve term faculty job requisitions, add academic appointment, faculty compensation changes, faculty one-time payments, faculty change job, and create position for academic hires.
	HR Executive	Review and Approve	✓ Review and approve Staff/Student HCM related tasks ✓ Full Workday access
	PD Partner	Review and Approve	✓ Review and approve BCGEU PD Fund requests
	Compensation Partner	Review and Approve	✓ Review and approve HCM business processes related to job classification and compensation ✓ Can 'add approver' to HR Executive if further review/approval is required ✓ Full Workday access

FINANCE SECURITY ROLES- **HELD BY CENTRAL FINANCE**

Typical UBC Position	Security Role in Workday	Can they initiate, action, and/or review?	Examples of what they can do in Workday
Central Finance Manager	**Cost Center Accountant**	Initiate	✓ Request new worktags ✓ Request a change to an existing worktag ✓ Perform accounting adjustments ✓ Perform Accounting Journals
Central Finance Manager	**Finance Director**	Review and Approve	✓ Approves all accounting adjustments and journal entries greater than $15,000 ✓ Is an FYI to someone responsible for forecasting and budgeting ✓ Does not replace a budget approval where needed
Central Procurement Staff	**Buyer**	Initiate, Review and Approve	
Central Accounts Payable staff	**Expense Partner**	Review and Approve	✓ Reviews and approves Expense report transactions for UBCO campus
Central Finance Staff	**Department Asset Tracking Specialist**		✓ Registers the equipment (asset) ✓ Initiate a disposal of an asset or transfer between units

CONTACTING THE ISC

CONTACTING THE INTEGRATED SERVICE CENTRE (ISC)



Access the online portal and knowledge base

Search the online knowledge base or submit and track a ticket via UBC's Self-Service Portal. Our comprehensive self-service, searchable knowledge base will be accessible 24/7. If the answer is not found in the knowledge base, a service ticket can be submitted through the self-service portal. Resolution time will vary depending on complexity of query.

Call the ISC

To speak directly to a service representative or if the query is urgent, the ISC can be reached at 604-822-8200 (UBCV) or 250-807-8163 (UBCO).

Hours of operation: Monday-Friday 7:30 a.m. - 5:00 p.m.

Contact the ISC Leadership Team

Harjot Guram, Senior Director, ISC. Email: harjot.guram@ubc.ca, Phone: 604-822-8700

Laleh Mosadegh, Director, Digital Delivery Solutions. Email: laleh.mosadegh@ubc.ca

David Truong, Senior Manager, Application Sustainment. Email: david.truong@ubc.ca Phone: 604-822-2836

Deirdre Brown, Senior Manger, Change Management and Communications. Email: deirdre.brown@ubc.ca Phone: 604-822-4441

Alice Shin, Senior Manager, Service Centre. Email: alice.shin@ubc.ca Phone: 604-827-0841

Lani McGill, Manager, HR Product. Email: lani.mcgill@ubc.ca

Leisa Belanger, Manager, Finance Product. Email: leisa.belanger@ubc.ca

Visit www.isc.ubc.ca to submit a ticket or find additional ISC contact information.