

IRP - IN THE KNOW

UBCO's newsletter for the latest updates on IRP HR, Finance, and Student



WORKDAY TIP OF THE MONTH



These are the hours you did not use in the previous year that have carried over into the current year's balance. If you used all your vacation time in the previous year, this column will be 0.

How to: Understand your Vacation Balance

These are the vacation hours you've taken for the current year.

This is your total vacation balance minus the vacation hours you've already taken.

Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date
70	175	24.5

More information on vacation balances in Workday [can be found here](#). If your vacation balance is incorrect and requires an adjustment, please contact your Manager and [follow the steps listed here](#).

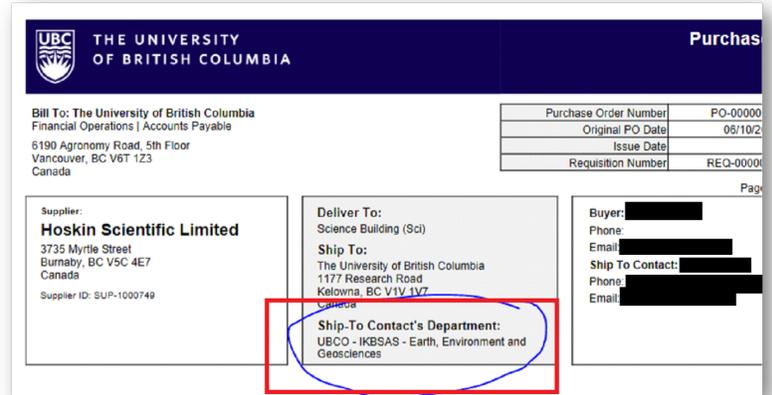
Ending Period Balance	Ending Period Balance Including Pending Events
220.5	220.5

These hours are your annual allotment based on your employment agreement. If you are a term employee, these hours will be prorated based on your term end date.

This is your total vacation balance minus the vacation hours you've already taken and any pending vacation requests.

POs WILL NOW SHOW DEPARTMENT NAME IN SHIPPING INFORMATION

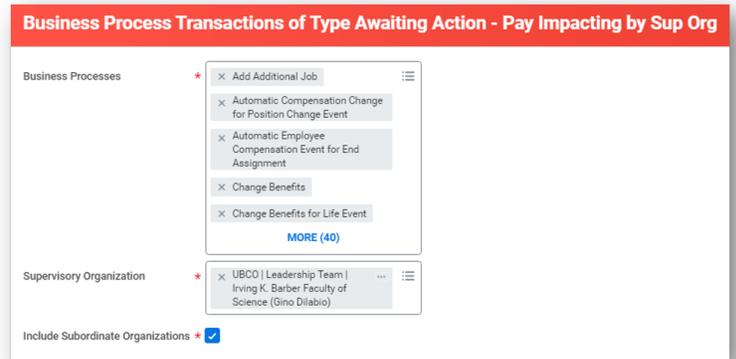
To assist the Central Receiving and Mail Services team in ensuring deliveries arrive to the correct recipients in a timely fashion, a new field has been added to POs in Workday. This field, titled 'Ship-To Contact's Department', is linked to the Ship-To Contact's department information as it's listed in Workday. This [follows the guidelines provided by Central Receiving](#) to include the department name when addressing all incoming mail. Please ensure the correct department is selected when creating these requisitions in order for the shipment to arrive at its intended destination!



HELPFUL REPORT: BUSINESS PROCESS TRANSACTIONS OF TYPE AWAITING ACTION - PAY IMPACTING BY SUP ORG

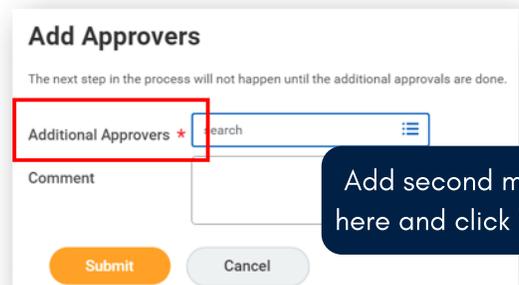
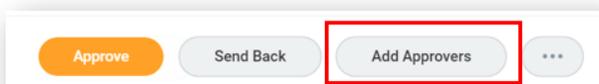
This report may be useful for those needing transparency on the status of various business processes within a Sup Org (and subordinate organizations) that impact employees' pay, such as compensation changes. The report shows the processes, who needs to take action, when it was initiated, and how long it's been in process.

HR Analysts can run this report for Sup Orgs to which they have access.



APPROVALS FOR EMPLOYEES WITH MULTIPLE POSITIONS

The business process approval workflow for employees with multiple positions in Workday is a known challenge. In Workday, one position is identified as the 'primary position'. This 'primary position' triggers the one-over-one reporting and approval relationship in Workday. This means one of the employee's managers will receive the lion's share of the approvals in Workday. It is currently not possible to divide these approvals based on worktags or type of business process. The only workaround is for the manager receiving an approval to 'Add Approver' to the process and add the second manager for it to be sent for their approval. This option is available for most business processes in Workday.



KNOWN ISSUE: LEAVE TIME NOT PAID OUT FOR HOURLY EMPLOYEES

There have been instances in Workday where **hourly** employees have entered paid absences, such as vacation or sick time, and have not been paid for these hours. The employee's absence bank will reduce when they submit the absence; however, the error in Workday occurs when they do not get paid for these hours. Any **hourly** employees with banked absences will need to complete a 'double entry' in order to avoid this error.

How to Complete a Double Entry

1

Employee submits a normal 'time entry' to be paid for the hours in question

2

Employee submits an 'absence request' to deduct the same hours from their vacation/sick/medical dental bank

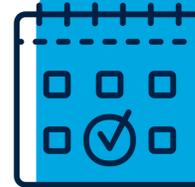
NEW COSTING ALLOCATIONS TRAINING COURSE

A new and updated 'Workday Costing Allocations' training course is now available. This new course provides information for anyone who needs to assign and maintain costing allocations for UBC employees. When payroll is calculated, the costing allocations are used to charge payroll costs to the appropriate program, grant, project, or gift. Staff with the following Workday security roles are recommended to take this course: HR Analyst, Finance HCM Partner, Finance Director, Manager, Cost Center Manager.

By the end, learners will be able to:

- Outline the purpose of costing allocations
- Define the different types of costing allocation and how they relate to one another
- Retrieve information on existing allocations for a position and/or worker
- Create new costing allocations for a position and/or worker
- Identify and correct mistakes in existing costing allocations

The training modules contain a variety of instructional content developed in line with community feedback, including text, diagrams, screenshots, and short, focused demo videos. [You can enroll in this course here.](#) If you need assistance accessing this course please email isc.trainingsupport@ubc.ca. If you have any questions regarding costing allocations, please contact Lauren or Carri.



Upcoming Costing Allocations Training sessions!

The UBCO Finance Managers and the IRP team will be hosting two Costing Allocations training sessions for HR Analysts at UBCO and other employees who want to learn more about Costing Allocation activities in Workday. These sessions will also include information on completing forms for adjusting entries.

Note: Both sessions will cover the same material. Please register for one session.

July 21st, 10:00 am - 12:00pm

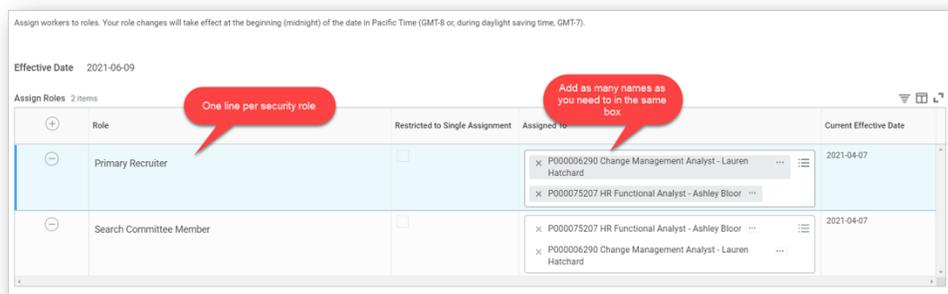
• [Register here](#)

August 26th, 1:00 - 3:00pm

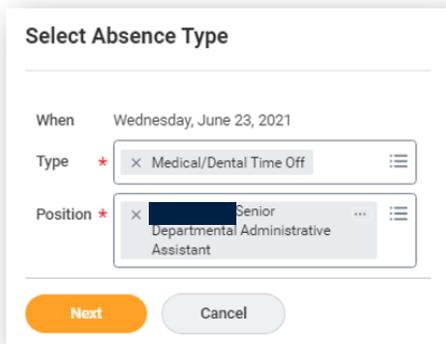
• [Register here](#)

HOW TO: ADD OTHERS TO YOUR JOB REQ

You can add as many Primary Recruiters and Search Committee Members to your Job Requisitions as you wish! The trick is to have one line per security role (i.e. Primary Recruiter) and add all applicable names into the same box, as shown in the image below.



BCGEU MEDICAL AND DENTAL APPT TIME IN WORKDAY



All regular and auxiliary employees have now had 15 hours added to their time off balance for 2021 for "Medical/Dental Time Off BCGEU OK".

Please remember to adjust the balance to reflect hours already used to date for this purpose. To do so please use the ["Maintain Accrual and Time Off Adjustments/Overrides" task. Instructions can be found here.](#)

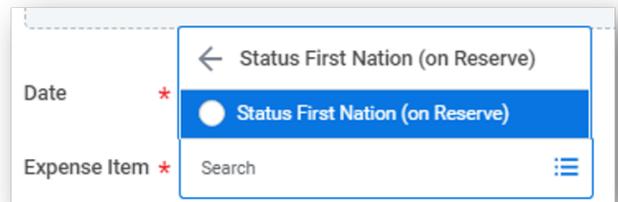
NEW SPEND CATEGORY: STATUS FIRST NATION (ON RESERVE)

A new spend category "Status First Nation (on Reserve)" was added in Workday. This new spend category should be used when making payments to status First Nations individuals who have provided services to the university while on reserve.

Spend category is relevant to business processes in the following areas:

- Expense Report
- Procurement (e.g., Purchase requisition)
- Supplier Invoice
- Accounting Journal

For information about how to perform these business processes in Workday, please search step-by-step instructions in the [Workday Knowledge Base](#).



FEATURE KNOWLEDGE BASE ARTICLE

The Supplier Self Registration process. For information and instructions on completing these actions in Workday, [visit the Knowledge Base article here](#). Additionally, it may also be helpful to review the [UBC Finance Supplier Setup page](#).

CONTACT THE INTEGRATED SERVICE CENTRE

If you need immediate Workday assistance, contact the ISC at (250) 807-8163. More contact information for the ISC Leadership Team is available at www.isc.ubc.ca/contact. **If you have an existing ISC ticket and require assistance, please contact Lauren.Hatchard@ubc.ca to further investigate the status of your ticket!**

Call the ISC

To speak directly to a service representative or if the query is urgent, the ISC can be reached at **250-807-8163**.

Hours of operation: Monday - Friday 8:00 a.m. - 5:00 p.m.

