



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations
Okanagan Campus

Workday Wednesday: HR + Finance FAQs

September 29th, 2021



RESOURCES AVAILABLE

Requesting the Creation of a new Sup Org

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=f3980c491b41a89027278556cc4bcb96&table=kb_knowledge

Security Role Requests

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=89e1bfe01bfab41047cfff034bcb23&table=kb_knowledge

Create Receipt Task

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=224622df1b40e8d0b2eda8ecbc4bcb24&table=kb_knowledge

One Time Payment Presentation Materials

- <https://isc.ubc.ca/sites/default/files/One-time%20payment%20Final.pdf>

Payroll Accounting Adjustment Request Form

- <https://finance.ok.ubc.ca/reference/forms-2/>

AGENDA

1 | Finance FAQs

2 | HR FAQs

3 | Q+A





FINANCE FAQs

FINANCE FAQs



Q

Why is my invoice not paid?



A

Goods/Services need to be 'received' in Workday in order to complete the procurement process. The 'Create Receipt' task in Workday is equivalent to 'OK to Pay' prior to Workday.

FINANCE FAQs



Q

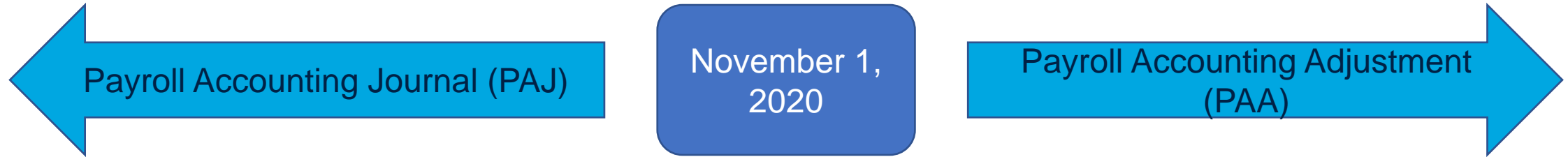
I've completed a Costing Allocation change, it's been fully approved, but I don't see any changes or updates on the ledger.



A

The Payroll Accounting Adjustment backlog is currently dating back to June transactions. We are looking into solutions to expedite these processes.

PAA VS. PAJ



- ✓ In Workday, retroactive adjustments to Costing Allocations (dated November 1, 2020 or later) will trigger Payroll Accounting Adjustment tasks to be completed by Payroll
- ✓ Payroll Accounting Journals should not be used for this purpose for periods after November 1, 2020 (as it can cause duplication of adjustment due to Payroll Accounting Adjustments being completed)
- ✓ Adjustments needed for before November 1, 2020 should be done via the [Payroll Accounting Journal request form](#)

FINANCE FAQs



Q

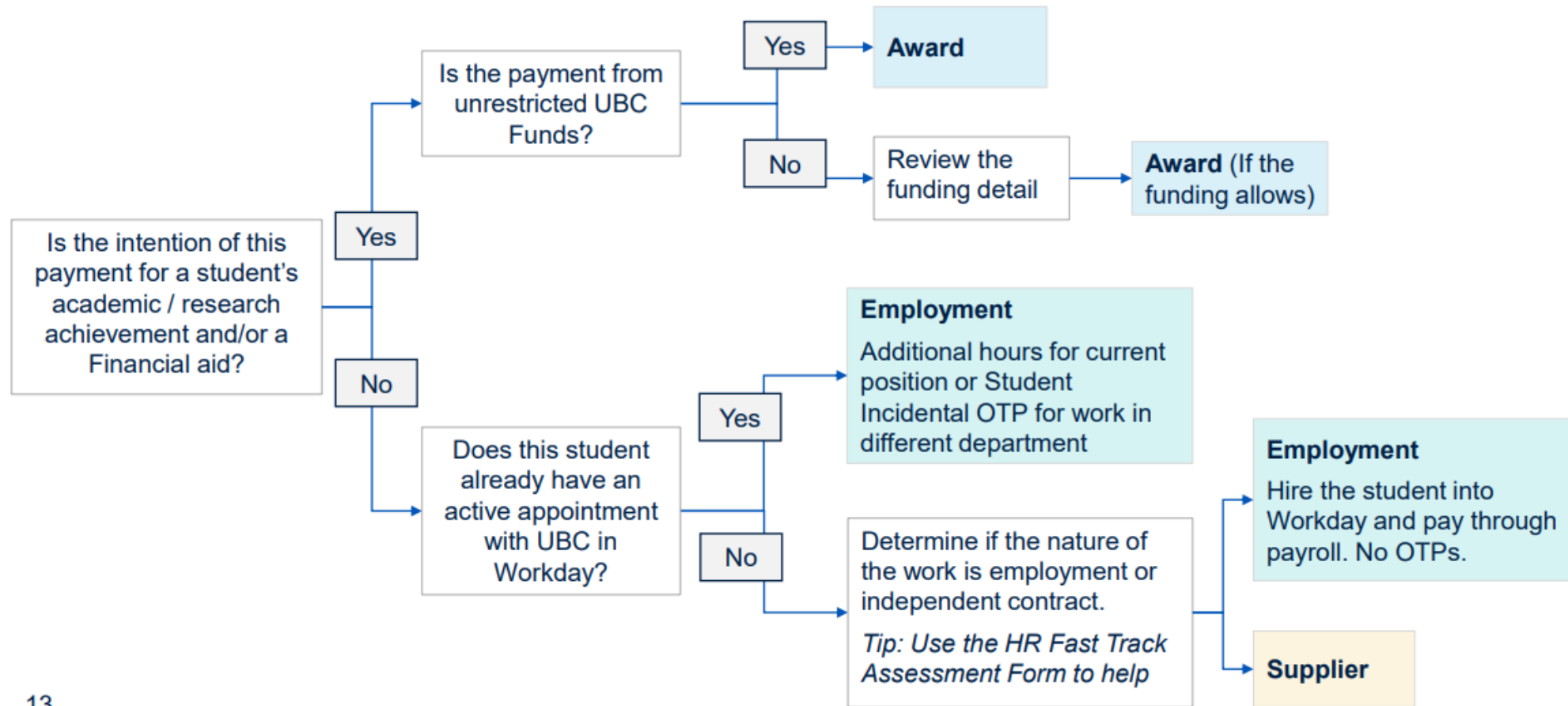
How do I know whether a One Time Payment should be used for a student?



A

There is a decision-making process in place for Student One Time Payments [available here on slide 13.](#)

High Level Decision Making Process for OTP



FINANCE FAQs



Q

How do I request the creation of a new worktag, such as a Program or Project?



A

Please contact your Finance Manager to discuss these options.



YOUR FINANCE QUESTIONS



HR FAQs

HR FAQs



Q

What is a Functional Unit Hierarchy and how do I change it if it's incorrect?



A

An employee's Functional Unit Hierarchy (FUH) is equivalent to the HRMS Dept ID. It should be your department. An FUH should never be 'UBC – Okanagan' or the highest node of your faculty/department if lower ones exist. To change a FUH, the HR Analyst or Manager will need to complete both a **Change Job** business process for the employee and a **Edit Position Restrictions** business process for the position. If you have any questions, please contact Lauren.

HR FAQs



Q

Can we update an employee's delegates if they've already started their absence?



A

The best practice is to have delegates organized and set up prior to your absence. If business processes are being held up as a result of an employee being away, [a ticket will need to be submitted to the ISC](#) in order to have this completed on the back-end.

HR FAQs



Q

I can't find the Sup Org which I need to hire an employee into.



A

There are two possibilities – either you do not have HR Analyst security access for this Sup Org, [which can be requested](#). Or, the Sup Org does not exist and [needs to be created](#). Our next [Workday Wednesday \(October 6th\)](#) will cover both of these topics.



YOUR HR QUESTIONS



Next Workday Wednesday: October 6th, 10:00 – 11:00am

Topic: Security Role and Sup Org Changes/Requests

[Registration link](#)

