



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations
Okanagan Campus

Workday Wednesday: Sup Org and Security Role Requests

October 6th, 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=89e1bfe01bfab41047cfffbf034bcb23&table=kb_knowledge

Supervisory Organizations Knowledge Base Article

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=2cb2985f1b243c109068c992604bcb68&table=kb_knowledge

Reviewing Security Role Assignments

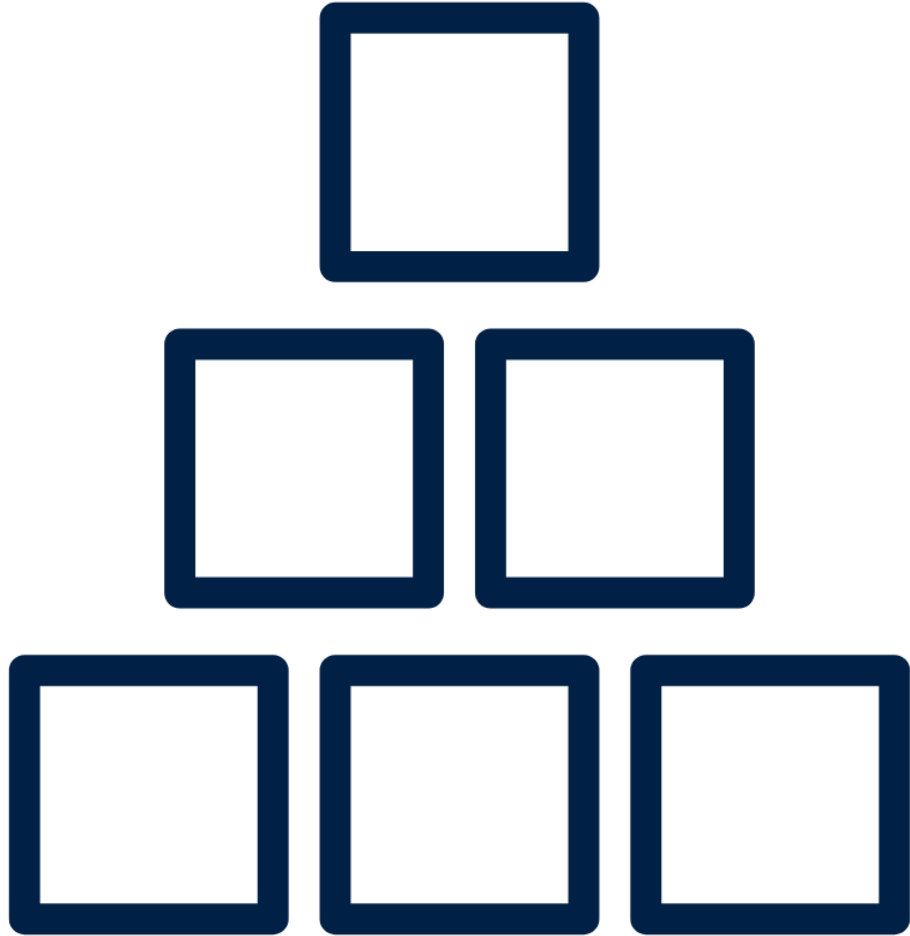
- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=243d265a1b863c500dbaec21b24bcb3e&table=kb_knowledge

Workday Tools (Chartfield Lookup, Reports Catalogue, Workday to PeopleSoft Translation Tool)

- <https://finance.ubc.ca/tools>

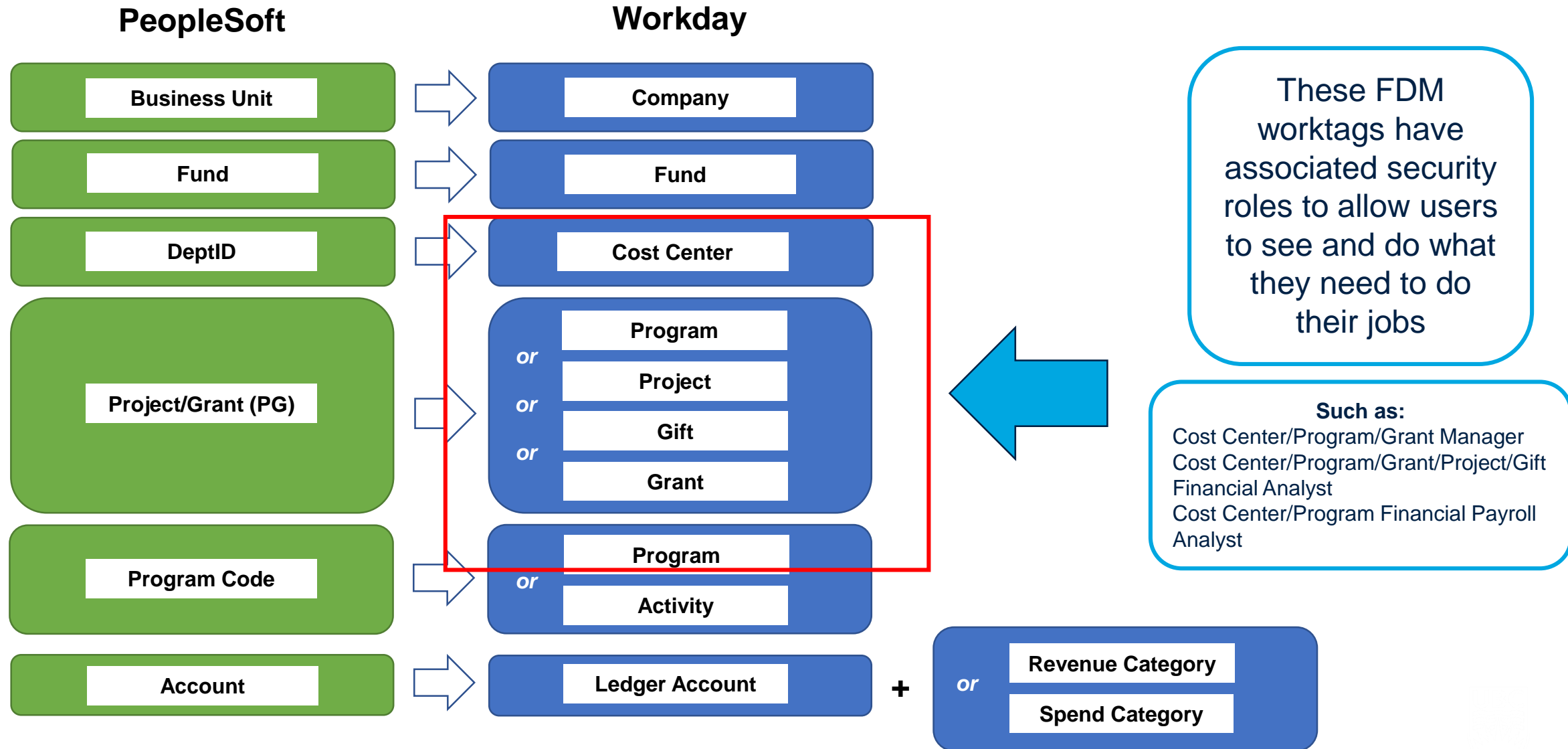
AGENDA

- 1 | Workday Structure and Definitions
- 2 | Navigating Sup Orgs
- 3 | Requesting New Sup Orgs
- 4 | Submitting Security Role Requests
- 5 | Common Scenarios



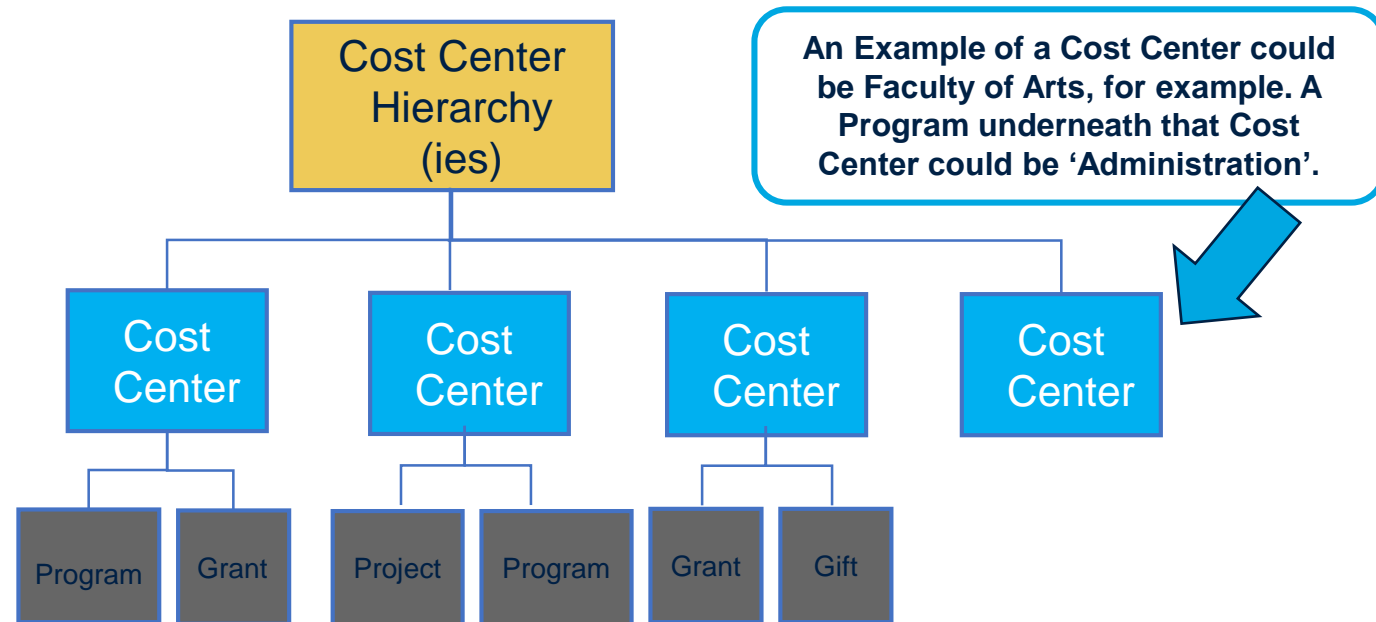
WORKDAY STRUCTURE AND DEFINITIONS

WORKDAY FINANCE ELEMENTS VS. FMS CHARTFIELDS



FINANCIAL STRUCTURE – COST CENTER HIERARCHY

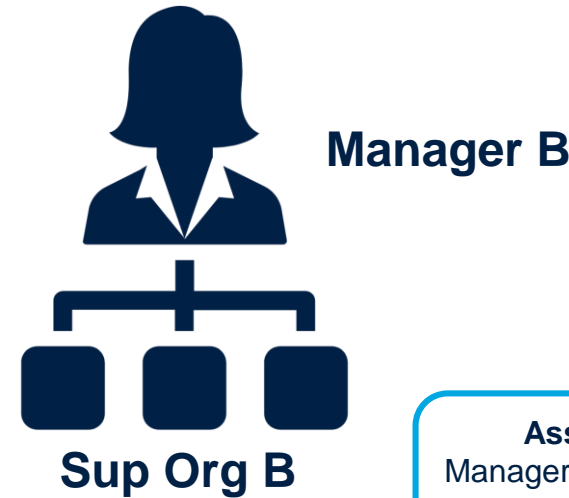
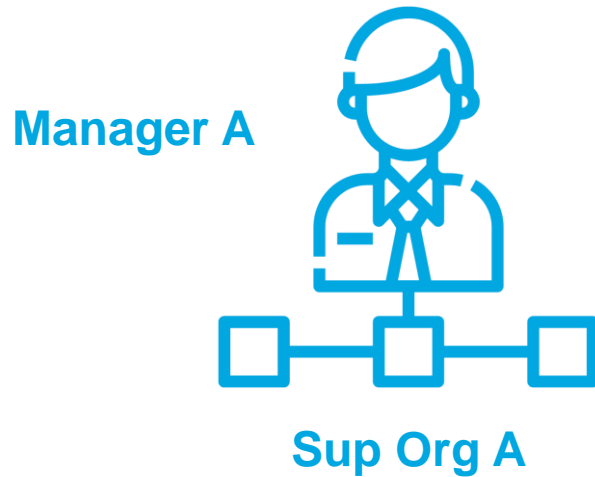
- A hierarchy arranges a group of worktags in an “org chart” fashion
- Cost Center is the **minimum lowest level** which means there **does not need** to be a Program, Gift of Grant attached to it.
- All revenues and expenses are **charged to a Program, Grant, Project, Gift, or Gift Initiative**
 - This allows for robust reporting and each of these levels
 - In some cases, revenues/expenses are charged to a Cost Center
- You can consult the [PeopleSoft/Workday Translation Tool](#) to see how previous PeopleSoft chartfields were converted into Workday



SUPERVISORY ORGANIZATIONS

A **Supervisory Organization** in Workday is a group of employees who report to the same **Manager**

A **Manager** in Workday is responsible for the hiring, managing, and termination of their employees. Unionized Supervisors are not Managers in Workday.



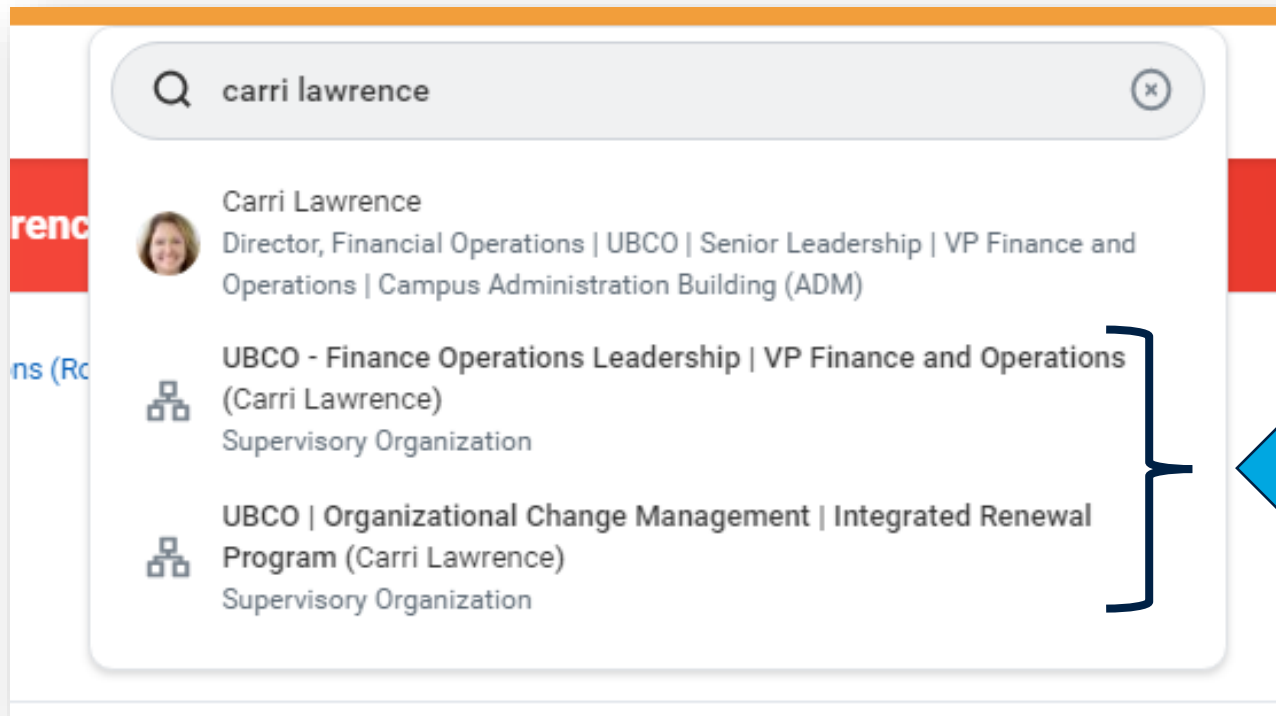
Assignable Security Roles:

Manager
HR Analyst
Timekeeper



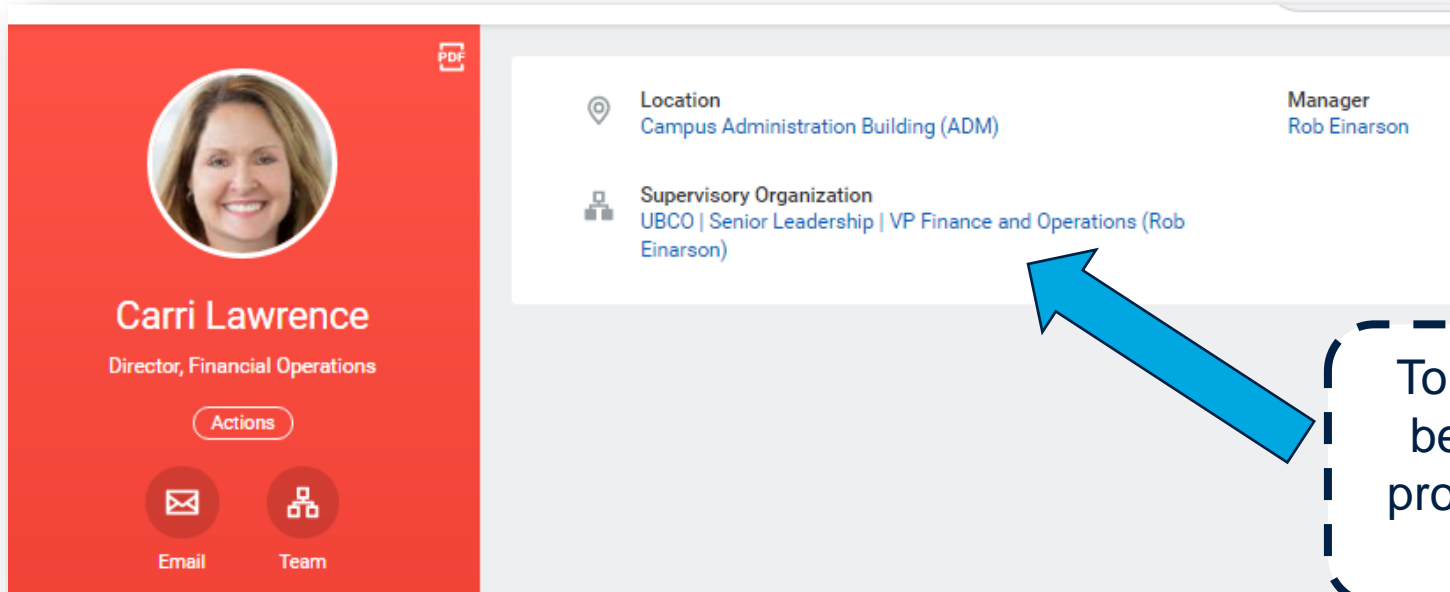
NAVIGATING SUP ORGS

NAVIGATING SUP ORGS



To find a Sup Org which an employee **manages**, type their name into the Workday search bar and navigate to their Sup Org

NAVIGATING SUP ORGS



The screenshot displays an employee profile for Carri Lawrence, Director of Financial Operations. The profile is divided into a red sidebar on the left and a white main content area on the right. The sidebar contains a circular profile picture, the employee's name and title, an 'Actions' button, and icons for 'Email' and 'Team'. The main content area lists the employee's 'Location' as 'Campus Administration Building (ADM)' and their 'Manager' as 'Rob Einarson'. Below this, the 'Supervisory Organization' is listed as 'UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson)'. A blue arrow points from a text box on the right towards the 'Supervisory Organization' text.

Carri Lawrence
Director, Financial Operations

Actions

Email Team


Location
Campus Administration Building (ADM)

Manager
Rob Einarson

Supervisory Organization
UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson)

To find the Sup Org which an employee belongs to, navigate to their employee profile in Workday and click on their Sup Org

NAVIGATING SUP ORGS

UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson) 

Sup Org ID

Details tab

Superior Sup Org

Type	Supervisory	Superior Organization	UBCO Leadership Deputy Vice-Chancellor and Principal (Lesley Cormack)
Organization ID	SO11702	Subordinates (first 5)	UBCO Engagement Services UBCO IT (Todd Zimmerman) UBCO Facilities, Construction Management Office, Energy, Health Safety and Environment, Security Campus Operations and Risk Management (Shelley Kayfish) UBCO Finance Strategies Leadership (Manon Harvey) UBCO Management Housing and Conferences Student Housing and Hospitality (Shannon Dunn) UBCO Office of Campus Planning (Benjamin Johnson)

Details

Members

Staffing

Roles

Security Groups

Organization Assignments

Availability Date

1900-01-01

Type

Supervisory

Subtype

Unit

Code

SO11702

Visibility

Everyone


Top Level

President's Office | UBC (Santa Ono)


Superior

UBCO | Leadership | Deputy Vice-Chancellor and Principal (Lesley Cormack)

Subordinates

UBCO | Engagement Services | UBCO IT (Todd Zimmerman)
UBCO | Facilities, Construction Management Office, Energy, Health Safety and Environment, Security | Campus Operations and Risk Management (Shelley Kayfish)
UBCO | Finance Strategies Leadership (Manon Harvey)
UBCO | Management | Housing and Conferences | Student Housing and Hospitality (Shannon Dunn)
UBCO | Office of Campus Planning (Benjamin Johnson)
 More (3)

Primary Location

 Campus Administration Building (ADM)

NAVIGATING SUP ORGS

UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson) ...

Type Supervisory Superior Organization [UBCO | Leadership | Deputy Vice-Chancellor and Principal \(Lesley Cormack\)](#)

Organization ID SO11702 Subordinates (first 5) [UBCO | Engagement Services | UBCO IT \(Todd Zimmerman\)](#)
[UBCO | Facilities, Construction Management Office, Energy, Health Safety and Environment, Security | Campus Operations and Risk Management \(Shelley Kayfish\)](#)
[UBCO | Finance Strategies Leadership \(Manon Harvey\)](#)
[UBCO | Management | Housing and Conferences | Student Housing and Hospitality \(Shannon Dunn\)](#)
[UBCO | Office of Campus Planning \(Benjamin Johnson\)](#)

Members tab shows you every employee residing in the Sup Org, including their Position numbers, phone, and email address

[Details](#) **[Members](#)** [Staffing](#) [Roles](#) [Security Groups](#) [Organization Assignments](#)

Members 9 items

Worker	Position	Phone	Email
Aaron Mogerman	P000044267 Director, Infrastructure Dev		✉ aaron.mogerman@ubc.ca
Anthony Knezevic	P000047659 Associate Director, IT Service Delivery	☎ +1 (250) 8079015 (Landline)	✉ anthony.knezevic@ubc.ca
Benjamin Johnson	P000072768 Director, Campus Planning		✉ ben.johnson@ubc.ca
Carri Lawrence	P000016359 Director, Financial Operations		✉ carri.lawrence@ubc.ca

NAVIGATING SUP ORGS

UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson) ⋮

Type

Supervisory

Superior Organization

UBCO | Leadership | Deputy Vice-Chancellor and Principal (Lesley Cormack)

Organization ID

SO11702

Subordinates (first 5)

UBCO | Engagement Services | UBCO IT (Todd Zimmerman)
ion Management Office, Energy, Health Safety and Environment, Security | Campus Operations and Risk Management (Shelley Kayfish)
adership (Manon Harvey)
ing and Conferences | Student Housing and Hospitality (Shannon Dunn)
anning (Benjamin Johnson)

Roles

tab shows you the security roles assigned to this Sup Org and who they've been assigned to

Details

Members

Staffing

Roles

Security Groups

Organization Assignments

92 items

Assignable Role	Assigned To		Role From
HR Analyst (Supervisory)	Christine Simon		Assigned
HR Executive (Supervisory)	Carleigh Benoit		Inherited
	Sarah Cochrane		Inherited



REQUESTING NEW SUP ORGS

REQUESTING NEW SUP ORGS

How do I request creation of a new supervisory organization?

Revised by Brandi Harrington • 5mo ago • 113 Views • ★★★★★

HOW DO I ... Request a new Supervisory or Matrix Organization?	ABOUT THIS TASK: Describes how to request a: 1. New Supervisory Organization OR 2. A new Matrix Organization
AUDIENCE: Sr HR Partner & Sr FR Partner (UBCV), Central HR Partner (UBCO), Managers	DETAILED JOB AID: N/A

If you are a manager or HR administrator and require a new Supervisory or Matrix Organization in Workday, please review the following instructions for submitting the request form.

You will need this information to complete the form:

- Reason for the request
- Name, number, and manager of superior organization
- Name and manager of newly requested supervisory/matrix organization
- Security roles, such as timekeeper, required for the organization

- First, complete and save **this form**.
- From this article, or from the front page in the UBC Self Service Portal, click 'Get Help' to start a new request.
- In the dropdown to specify what your issue is related to, choose 'Workday (General)'.

Please specify what the issue is related to

Select the general area issue is related to

-- None --

Student Information System Support

Voice Services

Website

Workday (Access & Security)

Workday (Finance/HR/Payroll)

Workday (General)

Other

- Before you submit the request, attach this completed form using the "add attachments" button in the bottom right of the request screen. Click the submit button when your request is complete.

Add attachments

- You will receive a notification once your request/ticket is received.

If you require multiple Supervisory Organizations (Sup Orgs), please complete one form per Sup Org Request.

The first step to request the creation of a new Sup Org is to consult the ISC Knowledge Base Article, [linked here](#).

You will need this information to complete the form:

- Reason for the request
- Name, number, and manager of superior organization
- Name and manager of newly requested supervisory/matrix organization
- Security roles, such as timekeeper, required for the organization

- First, complete and save **this form**.
- From this article, or from the front page in the UBC Self Service Portal, click 'Get Help' to start a new request.
- In the dropdown to specify what your issue is related to, choose 'Workday (General)'.

REQUESTING NEW SUP ORGS



New Supervisory and Matrix Organization for Workday Request Form

If you require a new Supervisory or Matrix Organization in Workday, please complete the below information and attach to your Service Now request.

From [UBC's self-service portal](#), click 'Get Help' to start a new request. In the dropdown to specify what your issue is related to, choose 'Workday (General)'. Before you submit the request, attach this completed form using the "add attachments" button in the bottom right of the request screen.

If you require multiple Supervisory Organizations (Sup Orgs), please complete one form per Sup Org Request.

Requests will be reviewed using the following guidelines:

Request Type	Proposed Timeline
New Sup Orgs for New Manager Hires New HCM Security Role(s) for New Hires	Review and prioritization of requests will begin mid December 2020
Inactivate Existing Sup Orgs New Sup Orgs or Changes to Existing Sup Orgs as a result of departmental changes/reorganization	Review begins in February 2021
Change to Sup Org (name, reports to information, etc.)	Review begins in February 2021
All other requests	Review begins in February 2021

You will receive a notification once your request/ticket is received.

Instructions on submitting the form can be found at the top of the form and in the Knowledge Base article in the previous slide

REQUESTING NEW SUP ORGS

Date Requested: Enter today's date

Reason for New Supervisory Organization:

New Manager Hired: ☐

Unit/Department Restructure: ☐

Other: ☐ (please provide detailed reason) Select the reason this new Sup Org is being created

Details of Superior Supervisory Organization:

Superior Sup Org Number (required): The Superior Sup Org is the one that will be above the new Sup Org

Note: The Superior Sup Org will be the Sup Org the new Manager sits in as an employee. To find the Superior Sup Org number, go into the Sup Org the new Manager is in and you will see 'Organization ID SOxxxx.' The SO number is the Sup Org number you need.

Superior Sup Org Name (required): Superior Sup Org ID (number) and name can be found following the instructions in slide 11

Details for New Supervisory Organization:

New Sup Org Name (required): New Sup Org name should follow the naming convention of other existing Sup Orgs residing under the Superior Sup Org

SUP ORG NAMING CONVENTION

UBCO | Senior Leadership | VP Finance and Operations (Rob Einarson) ⋮

Type

Supervisory

Superior Organization

UBCO | Leadership | Deputy Vice-Chancellor and Principal (Lesley Cormack)

Organization ID

SO11702

Subordinates (first 5)

UBCO | Engagement Services | UBCO IT (Todd Zimmerman)
UBCO | Facilities, Construction Management Office, Energy, Health Safety and Environment, Security | Campus Operations and Risk Management (Shelley Kayfish)
UBCO | Finance Strategies Leadership (Manon Harvey)
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UBCO | Office of Campus Planning (Benjamin Johnson)

Details

Members

Staffing

Roles

Security Groups

Organization Assignments

Availability Date

1900-01-01

Type

Supervisory

Subtype

Unit

Code

SO11702

Visibility

Everyone

Top Level

President's Office | UBC (Santa Ono)

Superior

UBCO | Leadership | Deputy Vice-Chancellor and Principal (Lesley Cormack)

Subordinates

UBCO | Engagement Services | UBCO IT (Todd Zimmerman)
UBCO | Facilities, Construction Management Office, Energy, Health Safety and Environment, Security | Campus Operations and Risk Management (Shelley Kayfish)
UBCO | Finance Strategies Leadership (Manon Harvey)
UBCO | Management | Housing and Conferences | Student Housing and Hospitality (Shannon Dunn)
UBCO | Office of Campus Planning (Benjamin Johnson)
⊕ More (3)

Primary Location

📍 Campus Administration Building (ADM)

The Manager's name will automatically be added in parentheses once the Sup Org is created

UBCO | Sup Org Name | Manager's Functional Organization Unit Name | Roll-up Hierarchy for Parent Functional Organizational Units

For example:

UBCO | Facilities and Technical Management | Department of Computer Science | Faculty of Science

UBCO | Research Assistants | Department of Mathematics | Faculty of Science

REQUESTING NEW SUP ORGS

New Sup Org Manager's Name (if known):

New Sup Org Manager Position Number

The employee managing the new Sup Org and their Position number

Security Roles, if required:

Timekeeper Position Number:

Any other HR Security Roles will inherit onto the new Sup Org. If you need to change HR Security Role assignments, please complete a Workday Access Help ticket via the [Self-Service portal](#).

List the Position number of the employee that needs Timekeeper security access for this new Sup Org if required. Additional security role requests will need to be completed **after this new Sup Org has been created**.

Matrix Organization, if required:

Matrix Manager Position Number (required):

Matrix Manager Name (if known):

Position Number to move into Matrix Org (required):

Employee Name to move into Matrix Org (if known):

Matrix Organization only needs to be completed if there is a dual reporting relationship

Requester's Name:

Requester's Position:

Your name and position

SUBMITTING YOUR SUP ORG REQUEST

Home **Request a Service** Search Knowledge View My Tickets View My Surveys

Request a Service

Report an Issue
If you're experiencing an issue, report it here.

Please submit this form with as much information as possible so we can help you resolve the issue promptly.
You will receive an automated email confirming your ticket submission and a tracking number. You can track the status of your request through "View My Tickets."

Your contact details for this ticket:

* Email:

From the UBC Self Service Portal, click on Request a Service > Report an Issue. Input your contact details. Select 'Workday (General)', add a title and short description, **attach your completed request form** and click Submit.

Please specify what the issue is related to

* Select the general area issue is related to
Workday (General)

Urgency

* What is the urgency of your issue?
3 - Low

Description

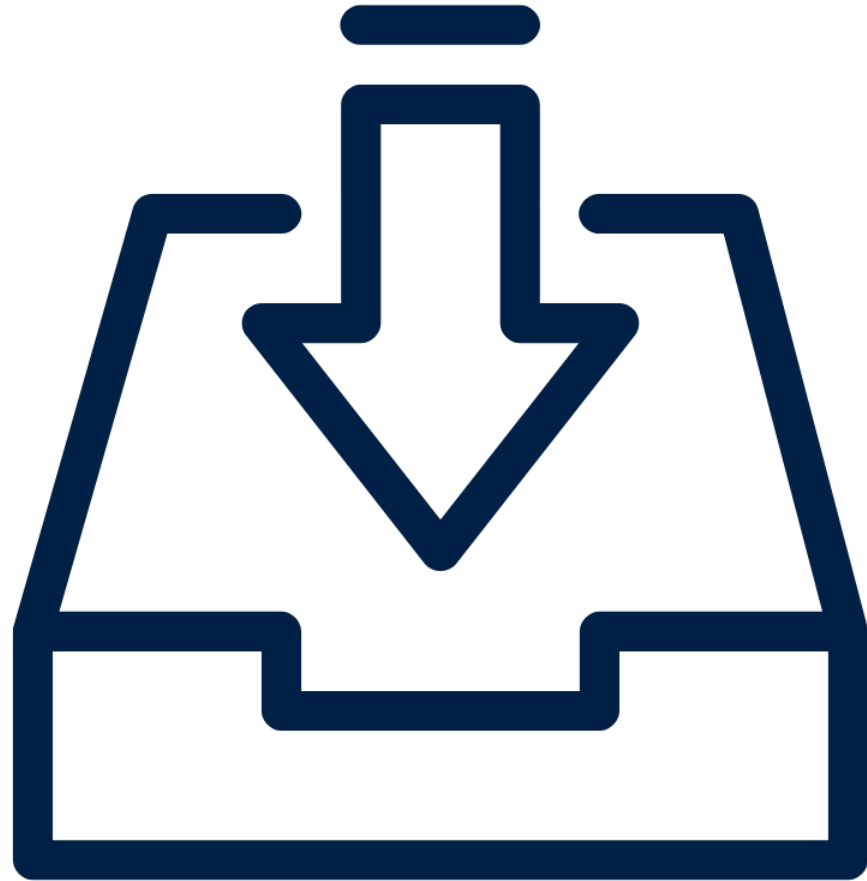
* Please provide a short title for your issue.
Workday Sup Org Request

Please provide a detailed description for your issue and include any error messages you may have encountered. Please do not include any personal information, example: password, IDs, SIN.

Submit

Required information
Phone:

Add attachments



SUBMITTING SECURITY ROLE REQUESTS

SUBMITTING SECURITY ROLE REQUESTS

Batched Security Role Requests and Submissions

Revised by Mary Julkowski • 14d ago • 263 Views • ★★★★★

Overview

Security roles determine what information you can access and actions you can perform within Workday. Security roles may be changed to support new work processes.

The ISC has developed a **new form to support requests for batched security role changes**.

Form for HCM & Finance Security Role Changes

The request form is required for Finance and HCM security role changes. The form contains information fields about Finance and HCM roles, including drop-down fields to help auto-populate information for security role assignments.

For all **grants-related roles**, continue to submit tickets. The Grants team will then work with Research Finance to ensure that the appropriate approvals are in place.

For **new FDM values and associated worktag managers**, continue to use the **FDM Change Request Framework** and identify related worktag managers.

Who Can Submit a Request

Ensure that your request has the necessary approvals for your Faculty or Administrative area; the ISC cannot process requests without the appropriate approvals.

Positions with the following roles can submit a request:

- Faculty Relations:
 - Executive
 - Senior FR Partner
- Finance:
 - Finance Director (or appropriate delegate)
- HR:
 - HR Executive
 - Senior HR Partner
 - Central HR Partner
 - HR Partner
 - HR Analyst

Before You Start

You will need to know whether this is an addition or removal, name, employee ID, position and position number for each role requested. Because roles are assigned on the position, it's essential to choose the right position if the worker has more than one. If one of the reasons in the dropdown is applicable, please select a change reason.

Important Note: The ISC will no longer accept requests from individuals to change their own security role, and will respond by asking the request be made via the batching process.

Step-by-Step Instructions

Step 1: Download the Template

Download the **Security Role Request Template** (Excel file).

Work

16

Review

Assign

64

Relat

No co

Still

If the

know

now.

The first step to submit a security role request is to consult the ISC Knowledge Base Article, [linked here](#).



Remember to request security roles for new positions or restructures in your unit!

Step-by-Step Instructions

Step 1: Download the Template

Download the **Security Role Request Template** (Excel file).

Note: Template updated in June 2021 (Rev 24): New column (F) added to it requested for a Hiring Solutions employee; column references updated.

SUBMITTING SECURITY ROLE REQUESTS

Finance Director =
your Finance Manager

HR Submitter = you

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

Completed templates will need
to be sent to
finance.ubco@ubc.ca for
approval

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

Add as many rows as required

Position Details						
Type of change	Worker Name	Employee ID	Position	Position ID	Hiring Solutions?	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?	Yes if this is a Hiring Solutions position, otherwise No	Why is this change required?
EXAMPLE: Remove	John Smith	123456	Manager	P00123456	Yes	Reorganization
EXAMPLE: Add	Juanita Brava	123456	Manager	P00125698		Missing role blocking BPs

SUBMITTING SECURITY ROLE REQUESTS

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 click here](#)
Then get the latest copy here (copy and paste link for l

Add as many rows as required

Position Details						
Type of change	Worker Name	Employee ID	Position	Position ID	Hiring Solutions?	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?	Yes if this is a Hiring Solutions position, otherwise No	Why is this change required?
EXAMPLE: Remove	John Smith	123456	Manager	P00123456	Yes	Reorganization
EXAMPLE: Add	Juanita Brava	123456	Manager	P00125698		Missing role blocking BPs

Position ID can be found on the employee's profile if you have HR Analyst/Manager access to their Sup Org, or by navigating to the 'Members' tab of their Sup Org.

This is their Business Title (e.g. Director, Financial Operations)

There are three options: New position, Reorganization, and Missing role blocking BPs

SUBMITTING SECURITY ROLE REQUESTS

Select role from drop-down list, or type role name if you know what you're looking for.

Finance Security Roles			
Finance Role Name	Eligible Organization Type for Role	Organization Reference ID	Was Segregation of Duties Checked?
Please pick from the drop-down menu. Review role definitions here.	Which level of the hierarchy does the role need to be assigned to? This cell automatically populates with the required organization type based on the role you have selected in column H. Please refer to this information and add the organization ID for the role you are assigning in	Which level of the hierarchy does the role need to be assigned to? Please check with your Finance Director if this is unclear.	Ensure that there are no Segregation of Duties violations. <i>Please pick from the drop-down menu.</i>
Research Collections Specialist	Must be: Company or Company Hierarchy	PJ000009	Yes
program financial analyst	Must be: Program or Program Hierarchy	pm003923	
	#N/A		
	#N/A		

This will auto-populate based on the role you choose

Enter worktag ID, such as Program/Grant/Cost Center number, etc.

User Instructions

Input template

Finance Roles

HCM Roles

Find SO ID

Finance roles and definitions are available in this tab

SUBMITTING SECURITY ROLE REQUESTS

Select role from drop-down list, or type role name if you know what you're looking for.

Security Roles		
HCM Role Name	Sup Org ID	Sup Org Name
Please pick from the drop-down menu. Review role definitions here.	What is the Sup Org ID this Security role is to be assigned on? How to find the Sup Org ID.	What is the Sup Org Name this Security role is to be assigned on?
HR Partner (UBCV)	SO17310	Leadership President's Office
HR Analyst (UBCO and UBCV)	SO00702	UBCO Senior Leadership VP Finance and Operations

Enter the Sup Org number and name

User Instructions	Input template	Finance Roles	HCM Roles	Find SO ID
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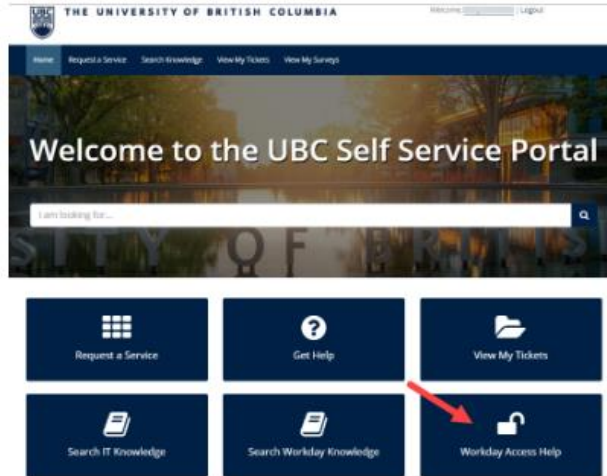
HR roles and definitions are available in this tab

SUBMITTING SECURITY ROLE REQUESTS

Step 3: Submit Request

Initiate a new security request by submitting a ticket.

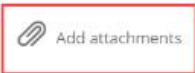
From the [UBC Self Service Portal](#), click on **Workday Access Help**.



Complete all required fields on the form.

In the **This Issue is Related to** field, select **Batch Role Request**.

Click on the **Add Attachments** icon at the lower right corner of the page, and attach the **Security Role Request Excel document** (from Step 2).



Click the **Submit** button.

1

Email your completed template to finance.ubco@ubc.ca for approval

2

Once approved, ensure your template includes the Finance Director (Fin Mgr) name and the indication of approval

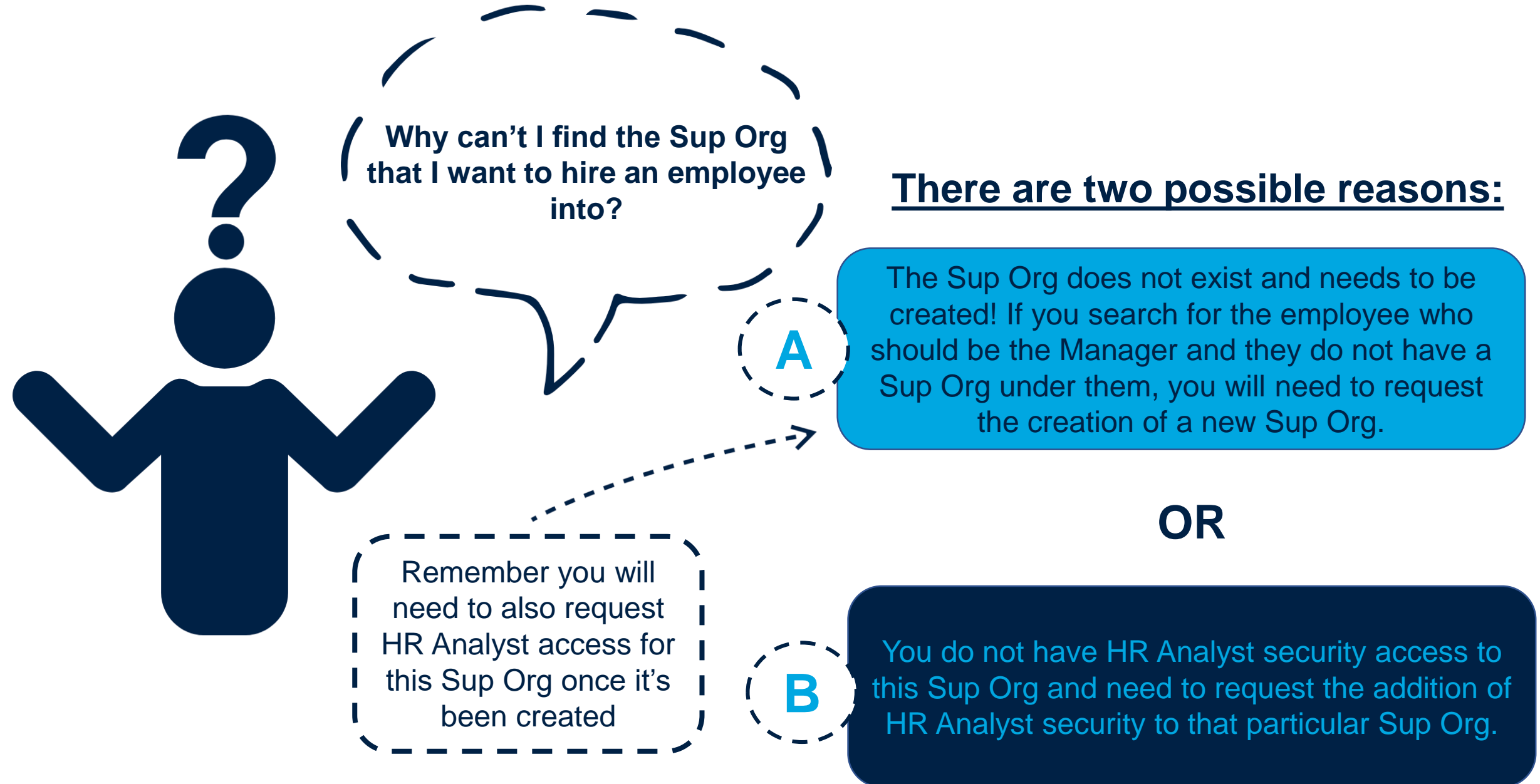
3

From the [Self Service Portal](#), click on 'Workday Access Help', complete all required field in the form, select 'Batch Role Request' from the drop-down menu, attach your completed template and submit.




COMMON SCENARIOS

COMMON SCENARIOS



COMMON SCENARIOS



How do I move an existing employee into an existing Sup Org if they are currently in the wrong one?

The diagram features three puzzle pieces. Two pieces are at the bottom left, forming a 2x2 square. A third piece is positioned above them, slightly to the right, with a dashed line and an arrow pointing from it to a thought bubble. The thought bubble contains the text: 'How do I move an existing employee into an existing Sup Org if they are currently in the wrong one?'.

Solution:

Email your HR Associate and request they complete the **Move Worker BP**. Let them know the employee and their Position ID, along with the Sup Org they should be moved to.



Next Workday Wednesday: October 20th, 11:00am – 12:00pm

Topic: Claiming your PD Funds (for Staff)

[Registration link](#)

