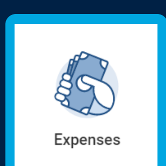
NOVEMBER 2021 | VOL. 27

IRP - IN THE KNOW

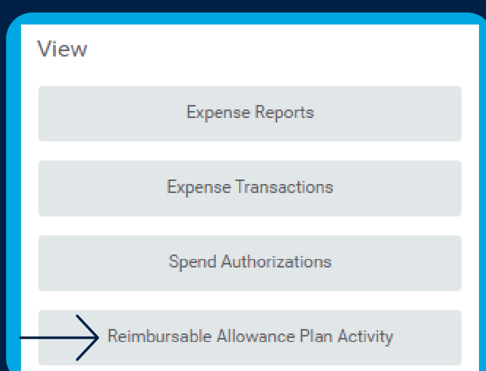
UBCO's newsletter for the latest updates on Workday HR, Finance, and Student

WORKDAY TIP OF THE MONTH

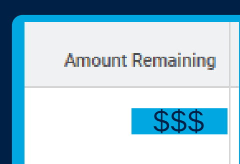
How to: View your PD Funds



Click on the Expenses application



Click 'Reimbursable Allowance Plan Activity'



View your amount remaining for the funding year

Visit the Knowledge Base Article *to learn more about submitting expense reports against your PD Funds*

REMINDER FOR APPROVERS

If a leave or termination is awaiting your approval in Workday, please approve the transaction immediately in order to avoid overpayments.

NOVEMBER ENGAGEMENTS

Workday Wednesday: Faculty and Staff One Time Payments
Wednesday, November 3rd | 10:00 - 11:00am
Register here

Workday Wednesday: Reading the Ledger Summary Report
Wednesday, November 10th | 10:00 - 11:00am
Register here

Workday Wednesday: Internal Service Delivery
Wednesday, November 17th | 10:00 - 11:00am
Register here

Workday Wednesday: HR and Finance Q+A
Wednesday, November 24th | 10:00 - 11:00am
Register here

Last month, we held sessions on Procurement, PD Funds (Staff), and Security Role/Sup Org requests. Session recordings and presentation materials ***can be found at the UBCO Workday Resources page****.*

MORE OPTIONS FOR JOB OVERLAP

As a result of the latest Workday release, the Job Overlap functionality has been improved for upcoming vacant positions and the hiring of backfill employees. These significant changes offer more flexibility for Administrators to manage these positions. Administrators are also no longer required to submit the vacating event (e.g. Leave of Absence) for the incumbent worker before hiring a backfill employee.

HR Administrators can now:

- Hire workers into an overlapped position, even when the incumbent worker has already vacated the position, resolving the issue of incorrect start dates for backfill employees.
- Directly enable or disable a position as "Available for Overlap" from the Edit Position Restrictions BP, resulting in fewer delays when processing the hire of backfill employees.
- Process the hire for a backfill employee, even if the vacating event hasn't yet been processed for the incumbent worker, resulting in fewer delays when processing employee transactions.

This will resolve these known issues:

- Being unable to retroactively backfill overlap positions as the new hire could only be hired after the position became vacant, even if the two workers overlapped.
- No ability to hire the backfill employee until the vacating event was processed, causing hiring delays when the details of the vacating event were unknown.
- Being unable to directly designate a position as available for overlap without a completed vacating event.

Where else you'll see this change in Workday:

- The option "Is this position available for Overlap?" will have 'Yes' automatically selected for vacating events (e.g. Change Job, Termination) to ensure the position is made available for overlap.
- In the hire process, when selecting the position to hire into, there is a new category titled "Filled Positions Available for Overlap", where you can search for the position. Departments can also use the "Overlap Workers" report to see employees that are currently in overlap positions.

THIS MONTH'S FEATURED KNOWLEDGE BASE ARTICLE

How do I enroll in, waive, or add/remove a Dependent from my Extended Health benefits coverage?

Find the Knowledge Base Article here.

Please note: If you are a new employee, you must first complete your Onboarding tasks in Workday before setting up your benefits elections.

CHANGES TO REPORTS FOR FINDING PO LINE

Effective October 15th, a new custom report titled '**Find Purchase Order Line and Line Splits by Organization**' will be replacing the following reports:

- Find Purchase Order Line and Line Splits *for* Organization
- Find Purchase Order Lines for Organization

This new report provides more information on the line level of the Purchase Order (PO) such as the remaining amount, invoiced and received amount, as well as associated invoices and receipts. This report also shows the name of the buyer and requestor of the requisition.

WORKDAY TRAINING RESOURCES

All Workday training courses can be found through the **Workplace Learning website**. If you require a leader-led training session, please contact finance.ubco@ubc.ca or Lauren.Hatchard@ubc.ca to discuss further and arrange a training session for your unit.

NEW DELEGATION RULE FOR INVOICE CODING

Effective November 1st, a new delegation rule will allow faculty members and staff to delegate the Invoice Coding step within the Supplier Invoice business process. Currently, employees can delegate the entire Supplier Invoice business process which includes the Invoice Coding and the Worktag Manager Approval (if applicable) steps. With this new delegation rule, employees will be able to retain the approvals related to the Supplier Invoice business process while enabling a delegate to perform the Invoice Coding step on their behalf.

For step-by-step instructions on how to set up this delegation, please see the Inbox Tasks and Approvals (Do Inbox Tasks on My Behalf) - Supplier Invoice Event section in the Knowledge Base Article below.

- **Knowledge Base Article:** **How do I set up delegation?**
- **Knowledge Base Article:** **Coding and Submitting Non-PO Invoices**

Contact the ISC

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

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

Need help with a ticket? Contact ***Lauren.Hatchard@ubc.ca***.