

IN THE KNOW

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



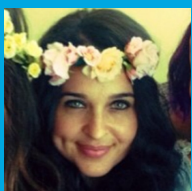
STAFFING UPDATES



Stacey Broderick is our new Buyer with responsibility for IT and furniture category purchasing. Stacey joins us from Okanagan College. She has 16 years experience in purchasing with post-secondary.



Chrystal Matthews is our new Buyer - General Campus. Chrystal joins us from Public Health. In addition to procurement, she has experience in finance and has worked on large capital projects and purchases for the health ministry.



Danielle Pannu returned from maternity leave in June to her role as a Functional Analyst on the HR team within the Integrated Service Centre.

Victoria Zalamea joined the Integrated Service Centre team as a Finance Functional Analyst. Victoria joins us from the Finance team where she previously supported procurement activities in her IT Procurement Analyst role.





WORKDAY TRAINING SESSIONS FOR NEW HIRES

Workday Basics

Tuesday, August 23rd | 9:00 - 10:00am

[Register here](#)

Submitting Time and Absence

Wednesday, August 24th | 10:00 - 11:00am

[Register here](#)

Expenses

Thursday, August 25th | 10:00 - 11:00am

[Register here](#)

Hiring Student Employees

Thursday, August 25th | 2:00 - 3:00pm

[Register here](#)

These sessions have been developed for new-to-UBC employees who require instructor-led training on common Workday topics. If you have any questions about these training sessions, please contact Lauren.Hatchard@ubc.ca.



FEATURED KNOWLEDGE BASE ARTICLE

Move Employees to a Different Supervisory Organization

[Find article here](#) (updated with instructions specific to UBCO employees)

REVIEW YOUR DELEGATIONS IN WORKDAY

If you have delegated tasks to individuals in Workday, or if you are a delegate, please review your delegations and delegation assignments. We've noticed multiple delegation arrangements that have delegated Workday approvals to the delegate, instead of the initiation of the task. In many cases, it's likely not appropriate for the delegate to be approving tasks in Workday that are intended for the approver, unless specifically agreed upon between the delegate and approver. [More information on delegations can be found here.](#)

To review your delegations, follow these steps:

[If you are delegating](#)

Review your delegations by navigating to 'My Delegations' in Workday. The 'For all Business Processes' column will show the tasks that have been delegated for approval. In the example shown, all business processes have been delegated for approval, which is likely not an appropriate arrangement. To edit your delegations, click the 'Manage Delegations' button from this page.

Start On My Behalf	For all Business Processes
Create Expense Report	
Create Expense Report	Yes
Hire Employee	
Manage Payment Elections	
Onboarding Setup	
Request Compensation Change	
More (2)	

[If you are the delegate](#)

Review your delegation assignments by navigating to 'View My Delegation Assignments' in Workday. The 'For all Business Processes' column will show the approvals that have been delegated to you. In the example shown, all business processes have been delegated for approval, which is likely not an appropriate arrangement. Contact the delegator to adjust the delegation assignments.

Start On My Behalf	For all Business Processes
Create Expense Report	
Create Expense Report	Yes
Hire Employee	
Manage Payment Elections	
Onboarding Setup	
Request Compensation Change	
More (2)	

NEW SIDE-BY-SIDE VIEW FOR SUPPLIER INVOICES

On the View Supplier Invoice page, users can now view the attached supplier invoice side-by-side with the invoice details in Workday. This new view allows reviewers and approvers of the supplier invoices (e.g., Finance Administrators, Budget owners) to compare the invoice with the information entered in Workday more easily.

To use the side-by-side view, click on the arrow button on the right side of any View Supplier Invoice page. The View Supplier Invoice page can be accessed from the Review Supplier Invoice task in your Inbox by clicking on the magnifying glass icon under Details to Review. You can also access the view page by searching for and selecting a Supplier Invoice number (e.g. SI - #####) or clicking on the Supplier Invoice number in a Workday report.

Please note, supplier invoices can only be searched for and viewed by individuals with the appropriate security roles.

TEAMS CHANNEL FOR ADMINS

The Workday Admin Leads Teams channel offers a dynamic space for administrators to ask Workday questions among the group, which also includes UBCO HR and Finance professionals. We also regularly share event information and Workday resources. If you are interested in joining this channel, or have hired a new administrator who would benefit from this resource, please contact Lauren.Hatchard@ubc.ca.

BCGEU SALARY SCALES UPDATE

The new BCGEU salary scales will be available once the bargaining process is completed. When the new salary scales are available, they will be posted on the [UBC HR Salary Scales website](#). In the meantime, administrators should continue to refer to the current BCGEU salary scales, [available here](#). Any further questions can be directed to the HR Associates.

UPDATED TRAINING COURSE FOR GRANTS MANAGEMENT

A new and improved version of our Workday training course, [Workday for Grants Management](#), is now available. This course for PIs and Grant Managers has been significantly restructured and refreshed in collaboration with Research Finance.

Key improvements include more information on:

- Awards and Grants, including naming conventions, how to view, and data definitions.
- How to access the Research Grants Dashboard as well as run, filter and read reports.
 - Purpose of additional reports and tasks, and what different fields mean.
- Managing signing authority by assigning Grant Managers and delegating tasks.

This course covers how to view award and grant details, use the Research Grants Dashboard, complete grant-related tasks and run reports, and manage grant signing authority. It also explains the Workday security roles involved in grants, and how grants and awards are connected in Workday.

Anyone with a Principal Investigator, Administrative Principal Investigator, or Grant Manager security role in Workday is encouraged to enroll. To access Workday courses, search 'My UBC Workday Training' in Workday and run the report to see what courses are available to you.

DIRECT HIRES TRAINING WEBINAR

Date: Thursday, August 11th | 10:00 am – 11:30 am

Audience: HR Administrators and Managers

[Register here](#)

Direct hires are when an employee is hired into a position without applying through a job posting. This webinar will cover how to prevent errors and how to troubleshoot common issues in this process. Learn how to select the right pre-hire record, update compensation, and process hires with different funding sources. Improve your understanding of the impacts of retroactive hires and academic appointments.

Knowledge Required to Register: Attendees should understand the basics of how to process a Direct Hire in Workday for staff, students and faculty.

[Submit and vote on questions prior to the session \(via Slide\)](#). **Closes Wednesday, August 3rd.**

Relevant Reading: Direct Hire for [Faculty & Staff](#), [GRA & URA](#), and [Teaching Assistant \(TA\)](#), [Contract Contingent Worker](#) (how to hire a Contingent Worker)

Relevant Training: Module 4 Direct Hire Staff & Student and Module 5 Direct Hire Faculty in the [Workday for HR Partner/HR Analyst course](#). If you are eligible to take this course, you can access it through the [My UBC Workday Training](#) report in Workday.

NEW EXPENSE REPORT FEATURE

The Expense Partner role (Accounts Payable team) now has the ability to send back single lines of an expense report, allowing the other expense lines to be reviewed and approved without any dependencies. This will alleviate delays currently caused by sending back a whole expense report to correct a single expense line.

TOP 5 TIPS FOR PREVENING PAY ERRORS

When pay issues arise due to errors in HR processes — such as hiring, compensation, employment status — departmental administrators must make these corrections. Managers and administrators can request support from HR or the ISC when needed, but the Payroll Operations team isn't able to modify or correct these processes. To help prevent common pay errors, [the Payroll team has put together these top 5 tips](#).

CONTACT THE INTEGRATED SERVICE CENTRE

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

Hours of operation: Monday – Friday | 8:00am – 5:00pm



Need help with a ticket? [Contact Lauren.Hatchard@ubc.ca](mailto:Lauren.Hatchard@ubc.ca).