IN THE KNOW

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

WORKDAY TIP OF THE MONTH

How To: View All Time Off For Multiple Sup Orgs

HR Analysts and Managers can now run the **Time Off Taken by Organization – Distributed** report to view employees' time off for any organization to which they have access. This report can be filtered by organization, date range, and even specific employees.

This will allow for greater transparency in resourcing and planning needs as it relates to vacation/absence requests within various organizations.

OCTOBER ENGAGEMENTS

Workday Webinar
Understanding Absences & Time off in Workday
October 20, 2022 at 10:00 am
Register here

UBC VISA Cardholder Workshop
October 27, 2022 at 10:00 am
Register here

FEATURED KNOWLEDGE BASE ARTICLE

Security Role Request Process
Find the article here

NEW REPORT TO VIEW SECURITY FOR VACANT POSITIONS

Previously, Workday only allowed users to run the 'Role Assignments for Worker Position' report, which required the position be filled in order to generate security role details. There is a new report available in Workday to now view security roles assigned to vacant positions. The **Security Role Assignments for Vacant Positions - Distributed** report can populate the security roles assigned to a vacant position in the event you need to view security after a position has been vacated. This can be especially helpful when hiring into an existing position and determining security role needs prior to the incumbent filling the position and starting their role at UBC.

PEOPLESOFT TO BE DECOMMISSIONED BY END OF OCT

It's been almost two years since UBC went live with Workday. PeopleSoft is now scheduled to be decommissioned to reduce costs to the university and eliminate security risks.

Who will be most affected by this change?

Anyone who requires access to the HRMS, FMS and other PeopleSoft software applications linked through the PeopleSoft portal, including Hyperion, nQuery, SERA TAM (Tuition Allocation), SEoT.

What is changing?

As the PeopleSoft HRMS and FMS platforms are decommissioned, the web interface and backend will be turned off and the portal will no longer be accessible. We are currently communicating with finance manager(s) on how we would be able to access this data. More information would be provided soon.

When will the change occur?

The PeopleSoft decommissioning date is currently planned for end of October.

NEW SAVE OPTION ADDED TO CREATE SUPPLIER REQUEST

The Create Supplier Request task in Workday now includes a 'Save for Later' button so that a request can be saved as a draft. This will allow requests to be edited or cancelled, including after they have been submitted but not approved.

Once a request is saved as a draft or has been submitted and is in progress, it can be found by searching for and running the 'My Supplier Requests' report, or by clicking the Purchases App in the Global Navigation Menu and selecting View – Supplier Requests.

'DELIVER TO' FIELD ON PURCHASE REQUISITIONS

When creating a requisition, there is a "Deliver To" field at the first step. This is within the 'Create Requisition' step, prior to navigating to the catalogue. Please ensure the 'Deliver To' field is updated to show the actual location for delivery, including details such as floor level, etc. This cannot be changed or updated on a catalogue order. This is a good process to adopt for all requisitions, but critical for Staples orders particularly as the "Memo to Suppliers" field is not communicated to the Staples fulfilment team.

Please ensure you communicate with your supplier to have the appropriate information on the shipping label: 'deliver to', 'location', and 'department'.

NEW REPORT TO REVIEW COSTING ALLOCATIONS

A new UBC custom report, **Position Restrictions Costing Allocations – Distributed**, has replaced both 'Position Restrictions Costing Allocations' and 'All Position Restrictions Costing Allocations' reports.

This custom report includes all information found in the previous reports in one report. It also now offers the option to save report filters (using Manage Filters) so they can be quickly applied when running the report in future. In addition, if the Positions Restrictions filter is left blank, this new report returns all results to make it easy to filter data after downloading it in Excel.

Administrators can use this report to check that Position Restrictions costing allocations are set up correctly.

# CHANGE TO MATCH EXCEPTION NOTIFICATION

The "Match Exception Notification" has been improved in Workday to assist requestors with addressing match exceptions.

The change includes: adding the Supplier Name, Supplier Invoice #, and PO # in the details. This will assist requesters in taking action on match exception errors by providing more information, such as the PO# to create receipts.
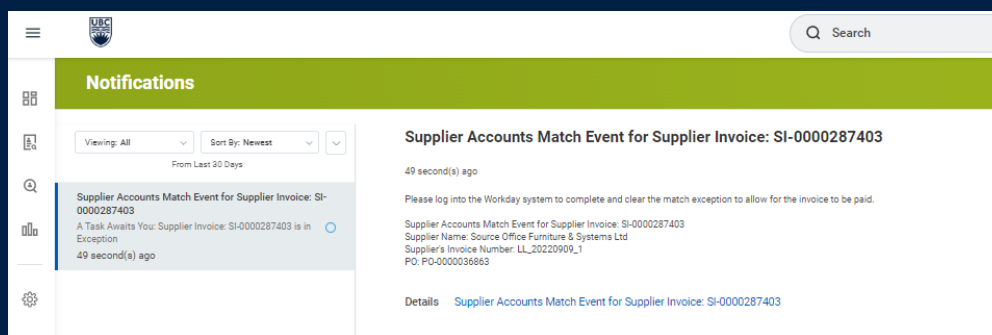
REQUISITION CART NOW UNDER TIMELY SUGGESTIONS

UBC faculty and staff will now see a cart icon under Timely Suggestions on their Workday homepage when items are added to a Purchase Requisition but are not checked out. The icon serves as a visual reminder that there are items in a Cart to either add more items or proceed to Checkout to Submit, Cancel or Save for Later.
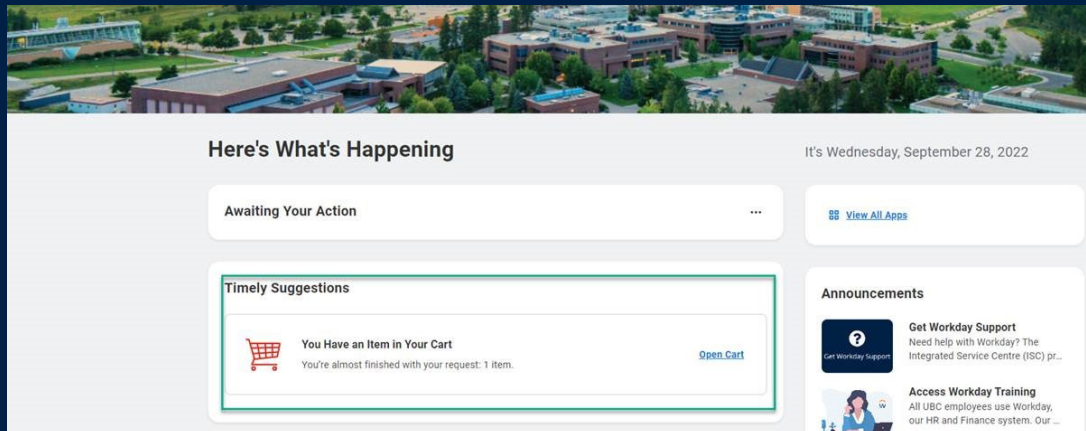
CONTACT THE INTEGRATED SERVICE CENTRE

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*