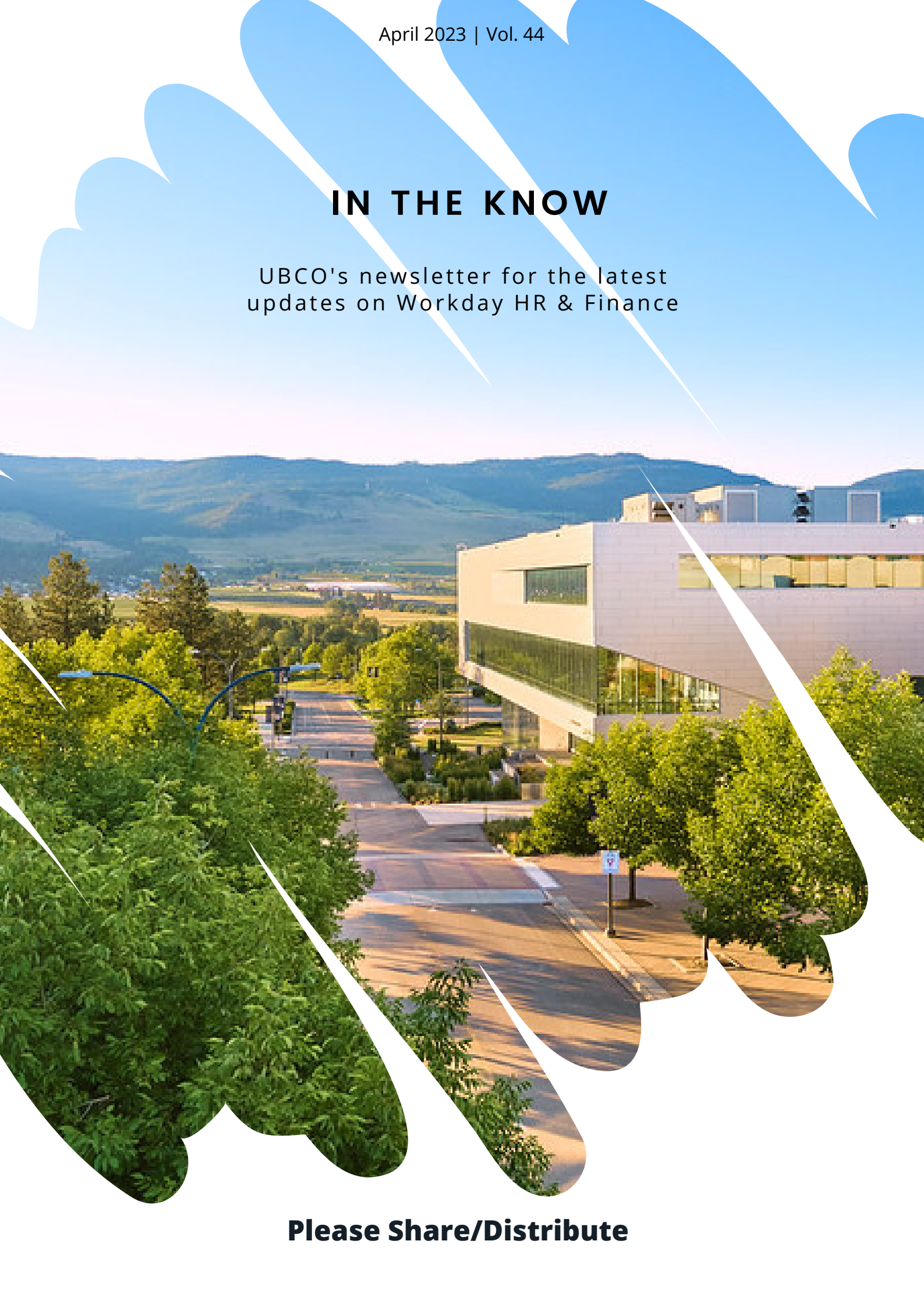


# IN THE KNOW

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



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## Purchasing through Supplier Catalogue

Supplier Catalogues are an e-procurement solution in Workday that simplify the purchasing experience with UBC's approved suppliers.

This online approach allows you to access and procure a supplier's catalogue of goods with pre-defined items and pricing for UBC – straight from Workday.

Workday connects you directly to a supplier's site, where you will be able to add items to a shopping cart and proceed to checkout, and then be re-routed back into Workday to complete the transaction.

Available Supplier Catalogues in Workday:

- [Staples Professional - Office Supplies](#)
- [VWR International - lab equipment, lab supplies, chemicals](#)
- [Fisher Scientific - scientific instrumentation, reagents and consumables, software](#)
- [Linde Canada - industrial gases](#)
- [Microserve - IT solutions, laptops](#)



## New Process for Approving and Recording Paid Sick Time Off for Employees Without an Adequate Balance

Managers will no longer be able to enter paid sick in Workday on behalf of employees who do not have a paid sick time balance but need to take time off due to illness. However, **under exceptional circumstances** or where it is specifically provided for in **Collective Agreements**, there may be instances where it is appropriate to allow an employee to take paid sick time beyond their balance.

More information [here](#).



## Reminder to Reduce Inaccurate Corporate Credit Card Reimbursements

A new checkbox, **Paid with Corporate Credit Card**, will now appear when corporate credit holders create an out-of-pocket Expense Report in Workday. The checkbox will be automatically ticked when a new expense line is added (**excluding professional development, per diems or mileage expenses**) to act as a reminder that if the expense was paid by a corporate credit card, it should be reconciled as a Credit Card Transaction, not an out-of-pocket New Expense.

Faculty and staff who leave the checkbox ticked and try to reconcile a Visa transaction as an out-of-pocket expense before it appears in Workday, will receive an error to notify them that they need to delete the expense line and resubmit as a Credit Card Transaction once the transaction is in the system.

If the corporate credit card holder needs to create an out-of-pocket expense report for a transaction not related to their corporate credit card, you can simply untick the checkbox.

The checkbox reminder will help to reduce duplicate and inaccurately reimbursed Corporate Credit Card expenses, which will decrease the need for departments to return funds.

[Reconcile UBC Corporate Credit Card Transaction on an Expense Report](#)



## UBC Launches Fifth Year of the UniForum Program

UniForum@UBC collects information to better understand – at an organization level – UBC services and activities, and how those services support academic mission and purpose. By gathering accurate data and gaining insight into our end-to-end processes and resourcing of services and activities at UBC, UniForum can help frame and support UBC's strategic planning at all levels, as well as improve implementation of important transformational projects.

Please note that Respondents in the data collection process will be contacted starting from this month to provide required data. More information will be communicated soon.



## Set up your Workday Delegations!

If you will be out of the office, be sure to set up your delegations in Workday to enable a colleague to initiate and/or approve tasks on your behalf in your absence. Workday tasks such as approving absence requests, receiving items, approving invoices/purchase requisitions, and many more can be delegated.

**Delegation does not remove accountability for the original user.** It does not transfer a person's security permissions to the appointed delegate, only security related to performing the delegated tasks. It will essentially route the Workday task from your inbox to the delegate's. Employees are expected to exercise professional judgement when selecting a delegate. For example, don't pick someone that is also going on vacation, or someone that shouldn't see confidential information. For step by step guide, please refer to: [Set up Delegation](#)



## New Knowledge Base Articles

### [View Supplier Invoice Payment Status](#)

- This article shows how to view the payment status of a supplier invoice related to a purchase order for a purchase requisition.

### [Close Position](#)

- The Close Position business process can be used to functionally delete an open position. Though records of the position will remain, once closed a position cannot be reopened. If the position has an open job requisition associated with it, the requisition must be closed first.

### [Cancel a Draft Receipt](#)

- A Purchase Order can't be closed if there is a draft receipt outstanding against it. In some instances, a draft receipt may be created in error. The receipt must be cancelled so the PO can be closed. The Cancel Receipt task can be used to cancel a draft receipt so a new one can be created if required.



## My UBC Workday Training

**All new hires and existing employees are implored to take all necessary training specific to their function in Workday.**

The 'My UBC Workday Training' report returns a list of enrollment links for Workday Training courses relevant to you.

This list is based on your employment criteria (e.g. salaried/hourly/faculty/staff) and current Workday security roles.



## Access Workday Training

All UBC employees use Workday, our HR and Finance system. Our Workday training courses are regularly updated to help you build skills and stay current with Workday at UBC.

### Workday Training for All Employees

Visit [UBC Workplace Learning](#) and choose the topic 'Workday' to see courses available to all employees with a CWL. These courses cover basic navigation, tasks, and processes in Workday.

### Workday Training by Role

We also offer training courses based on tasks or processes that are done by certain employees based on their role at UBC, such as Managers, Administrators, and others who do HR or Finance tasks.

To see a complete, customized list of all courses applicable to your role, search for and run the 'My UBC Workday Training' report.

[My UBC Workday Training](#)



## Resources/Links

[Common Finance Reports](#)

[Costing Allocations Training](#)

[View, Edit, Change or Cancel an Expense Report](#)

[How to Set Up Delegation](#)

[Complete Tasks as a Delegate](#)

[UniForum FAQs](#)



## 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 Workday support request here](#)

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

