IN THE KNOW

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

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Improved Workflow to Reassign Tasks When an Employee Leaves UBC

When a UBC employee leaves the university, goes on leave, or when a contingent worker's contract ends, pending tasks left in the worker's Workday inbox will now route to the worker's Manager to assess as part of the Manage Worker Business Process, instead of being distributed to various other roles. Managers are better suited to determine whether remaining tasks should be cancelled, or whether they should be reassigned to another team member, and if so, which team member.

This change will reduce the number of unnecessary notifications being sent to various roles and expedite the completion of remaining tasks left in a worker's inbox once they leave.
Reassign a Task in Workday

New Field for Deducting Daily Commute Distance on Mileage Expenses

A new optional field, One-Way Daily Commute Distance, is now available when creating an Expense Report or Spend Authorization (Cash Advance) for mileage expenses in Workday.
Faculty and Staff can use the field to enter the distance of their usual, one-way commute to their UBC place of business. This distance will then be subtracted from the total Distance to Expense of the mileage claim, so that they are only reimbursed for the mileage that exceeds their usual daily commuting distance (in accordance with UBC's Business Expense Policy).

If the mileage claim is for a round-trip journey, the 'Round Trip' checkbox should be selected, and both the estimated driving and one-way daily commute distances will be doubled.

New Error Message on Purchase Requisitions to Expedite Purchase Order Processing

When creating a Purchase Requisition in Workday, an error message will now appear if [UBC Catalogue](#) and non-Catalogue items, or multiple items from different Catalogue Suppliers, are combined into one Purchase Requisition.

This error message will prevent submission of the requisition until only Catalogue or non-Catalogue items are selected, and until only items from a single Catalogue Supplier are included. This will ensure that information added to the Requisition's header, such as the Deliver-To and the Memo to Supplier fields, is sent to the correct supplier. It will also expedite the Buyer Review process, by making it easier to create Purchase Orders (POs) and improve overall turn-around times of issuing POs to suppliers.

Reducing Cheque Issuance Delays

A reminder to UBC faculty and staff members to double-check the supplier's address to prevent any potential errors or delays in payment processing. Please note that canceling and re-issuing cheques generates administrative work across multiple teams and may result in cheque issuance delays.

To update the address in the Workday, submit a [Change Supplier Contact Information Request](#). If you need assistance with the request in Workday, please submit an ISC ticket through the [UBC Self-Service Portal](#).

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.

Reduce the Frequency of Workday Emails

Each time you receive an Inbox item in Workday, you will receive an email notification to your Outlook account prompting you of the pending item that requires action.

If you receive many Workday email notifications, you can reduce the frequency of these emails. There are three frequency options for email notifications:

1. **Mute**: No emails are sent for the notification type.
2. **Immediately (default)**: A separate email is sent for each a new notification.
3. Daily: A **'Daily Digest'** email is sent containing all new notifications from the last 24 hours.

- The Daily Digest email is sent at 12pm PST and contains all notification types where the frequency is set to Daily. Workday doesn't send a separate Daily Digest email for each notification type.
- Daily Digests emails are limited to 50 action items and 50 notification items. When there are more than 50 action or notification items, the email includes a link to the remaining items.
- Delivery time may vary based on third-party email providers and the current load on Workday.

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

Updated Knowledge Base Articles

[Create an Expense Report for Mileage](#)
- This article shows how Workday integrates with Google Maps to calculate driving distances as part of creating an expense report, and information on how to use the One-Way Daily Commute Driving Route field.

[Reassign a Task in Workday](#)
- This article is updated to provide information on how a Manager can reassign tasks when a UBC employee goes on a Leave of Absence, their employment at the University ends, or a contingent worker's contract ends. Pending tasks in the worker's Workday inbox will route to the worker's Manager via the Manage Worker Business Process.

Upcoming Engagements

Workday Wednesday Sessions:

Topic: **Delegations**
Date/Time: June 14, 2023 | 10:00 am
[Meeting link](#)

Topic: **Common Financial Reports**
Date/Time: June 21, 2023 | 10:00 am
[Meeting link](#)

Topic: **Supplier Setup and Payment Options**
Date/Time: July 19, 2023 | 10:00 am
[Meeting link](#)

Topic: **Introduction to Procurement 101**
Date/Time: August 9, 2023 | 10:00 am
[Meeting Link](#)

Topic: **Non PO Invoices & Expense Transactions**
Date/Time: August 16, 2023 | 10:00 am
[Meeting link](#)

Topic: **Spend Authorization/Cash Advances**
Date/Time: September 13. 2023 | 10:00 am
[Meeting link](#)

Topic: **Match Exceptions**
Date/Time: October 11, 2023 | 10:00 am
[Meeting link](#)

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]
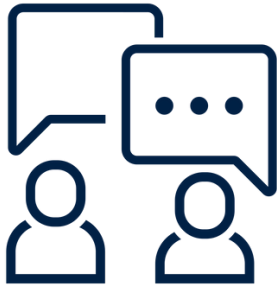
Resources/Links

[Cash Deposits](#)
[One Time Payment](#)
[Reconcile UBC Corporate Credit Card Transactions on 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