

IN THE KNOW

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



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Purchase Requisitions App: Centralized Location for Requisition Management

The APP provides an at-a-glance dashboard view for faculty and staff who regularly deal with procurement tasks and manage multiple Purchase Requisitions.

offers filtering functionality to sort requisitions by status, including whether it is open (draft, canceled or awaiting action), completed, or if there is an error to fix

- Greater visibility into all requisitions by displaying quantity and costs as well as Buyer and Accounts Payable Contacts
- Quick visibility into the progress, ordering, receiving, invoicing stage
- Eliminates the need to run procurement-related reports to locate downstream transactions (for instance, match exception errors or missing receipts)

The APP is recommended for faculty & Staff who regularly create and manage numerous Purchase Requisitions.

[Create Purchase Requisition - Catalogue](#) or [Create Purchase Requisition - Non-Catalogue](#) Requisition tasks in Workday are still available and recommended for one-off requisitions.

The screenshot shows the 'Menu' interface with the following elements:

- Menu Header:** 'Menu' with a close button (X).
- Navigation:** 'Apps' (selected) and 'Shortcuts' tabs.
- App List (Left):** Compensation, Recruiting, Career, Absence, Pay, Benefits, Purchases, Expenses.
- Add Apps Section (Right):**
 - Back to Menu button (X)
 - Section title: 'Add Apps' with subtitle 'Personalize your menu with useful Apps.'
 - Search bar containing 'requisitions'.
 - Search results list:
 - My Requisitions (with a red X icon)
 - Requisitions (Status)
 - My Open Job Requisitions
 - Open Job Requisitions b...
 - Requisitions (with a green checkmark icon)** - This item is highlighted with a red box.
- Buttons (Bottom):** 'Add Apps' (highlighted with a red box) and 'Edit' buttons.



HR Security Roles: Inheritance

If you assign a security role at a specific supervisory organization, and then indicate "**and all subordinate supervisory organizations**":

- That security role will be assigned at the specific organization you identified and everything below it.
- If subsequently, another position is assigned that security role at one of the lower supervisory organization, this will nullify the first positions security access to that supervisory organization.

Superior Supervisory Organization	UBCO Senior Leadership VP Finance and Operations (██████████)	
Subordinates	UBCO Engagement Services UBCO IT	UBCO Audio Visual UBCO IT
	UBCO Office of Campus Planning	UBCO Sustainability Campus Planning
	UBCO Finance Strategies Leadership	UBCO Finance Strategies Finance
	UBCO - Finance Operations Leadership VP Finance and Operations	
Example:		
On June 1, 2023 IT requested to assign Tom Jerry in Position # 123456 the HR Analyst security role to the Supervisory organization Engagement Services UBCO IT and all subordinate organizations		
Tom Jerry will hold HR Analyst security role for both supervisory organizations:		
	UBCO Engagement Services UBCO IT	
	UBCO Audio Visual UBCO IT	
Then on July 1, 2023, IT requested to assign Bugs Bunny the HR Analyst security role to supervisory organization:		
	UBCO Audio Visual UBCO IT	
After this addition, security to the IT Supervisory organizations will look as follows:		
Tom Jerry - Position #123456	HR Analyst	UBCO Engagement Services UBCO IT
Bugs Bunny - Position 0987656	HR Analyst	UBCO Audio Visual UBCO IT
Tom Jerry will no longer have the HR Analyst security role for supervisory		
When you ADD the security to Bugs Bunny you must also add it for Tom Jerry		



International Supplier Set Up

The Global Disbursement Service (GDS) is UBC's method for making international payments (outside of Canada and the US). When submitting GDS requests, please ensure that the Global Disbursement Form is completed accurately and signed.

Access the form and find more information on the [Global Disbursement Service page](#).



Procurement Survey

The Procurement Team is looking for your feedback! The survey is set to get feedback on your knowledge about Procurement Services, your experience, your training needs (format, frequencies, relevance), and recommendations on improving service delivery quality.

Please note that the the survey is anonymous.

Thank you!

[Procurement Survey Link](#)



Modern Slavery Act - Passed

“The Federal government recently passed **Bill S-216 “Modern Slavery Act”** through parliament. Parliament considers that it is essential to contribute to the fight against modern slavery through the imposition of reporting obligations on entities involved in the manufacture, production, growing, extraction or processing of goods in Canada or elsewhere or in the importation of goods manufactured, produced, grown, extracted or processed outside Canada.

What does this mean for UBC?

We need to be aware of our supply chain, who makes our domestic goods? What are their standards? Where our imported goods are coming from? Who are our suppliers, suppliers? and where they get their parts or raw materials? Ignorance will not be an acceptable answer. We will need to start asking our suppliers questions and not assume that at face value they have the same values and standards as Canadian laws. Suppliers will need to ensure and confirm to UBC that their practices and their suppliers practices are compliant with the Modern Slavery Act.

What are the penalties for non-compliance?

Fines of up to **\$250,000**.

Useful Links: [The regulatory and legal implications of Canada’s Modern Slavery Act | PwC Canada](#)
[Canada’s Modern Slavery Act: What businesses need to know \(osler.com\)](#)

More information will be made available to the community as UBC determines any policy changes affected by the act.

Information sessions will be planned for the Okanagan community. Procurement is available to help all departments and faculties with any questions/clarifications.

Please contact **Rebecca Way**, Procurement Manager, for any questions or concerns at rebecca.way@ubc.ca.



Ethyl Alcohol Usage Report

UBC receives a 99% remission of excise tax on its purchases of ethyl alcohol for scientific research and/or teaching purposes. If discrepancies occur that cannot be accounted for, Excise Tax will be assessed to the full penalty of 10.733 per litre.

It is the responsibility of each person/lab/department that purchases ethyl alcohol to ensure that accurate records are on file to meet audit requirements for the Canada Revenue Agency (CRA).

Note: This is only required for concentrations of ethanol larger than 95%

University labs/departments are requested to follow the guidelines outlined below when purchasing, receiving and using ethyl alcohol. More information [here](#)



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](#)



Previous Engagements & Resources

Topic: **Security Roles & Assignments**

[Presentation Slides](#)

[Recording](#)

Topic: **Delegations**

[Presentation Slides](#)

[Recording](#)



Upcoming Engagements

Workday Wednesday Sessions:

Topic: **Hiring Students**

Date/Time: July 12, 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](#)

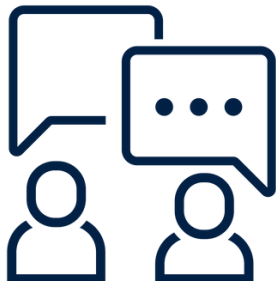


Resources/Links

[Create, Edit, Change, or Cancel a Supplier Invoice Request](#)

[Edit Job Requisition](#)

[Inbox Delegations in Workday](#)



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

