IN THE KNOW

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

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New Expense Hub in Workday

The new Expenses Hub provides a central location where all employees can quickly access expenses-related tasks, see any items that require their attention, and more easily find useful resources. This gives faculty and staff more visibility over their expenses, and makes it easier for them to find and complete expense-related processes. The new hub will be especially useful for those who submit a high volume of expense reports, including employees with a UBC credit card.

The new hub includes:

- Quick access to common expenses-related tasks and processes.
- An up-to-date listing of items that require action from you (e.g. submit, correct).
- Automatic display of information from reports, including an **'Actions'** button (if applicable).
- A dynamic menu that shows options based on your Workday profile and activity.
- Direct access to UBC webpages related to expenses and key Workday reports.
- More help text and guidance on expenses, cash advances, and spend authorizations.

Note: The previous Expenses application is still accessible but will be retired later this fall.

New Expense Hub Quick Tip: Deleting Expense Draft(s)

The new Expenses Hub has the feature that enables you to cancel/delete expense draft thereby removing unnecessary expense items.

Expense Reports To Submit
Expense reports to submit, change, cancel or correct.

DRAFT
2022-10-21 - EXP-0000276759 ...
Total: $0.00

DRAFT
2022-03-01 - EXP-0000171792 ...
Total: $0.00

DRAFT
2021-06-04 - EXP-0000080342 ...
Total: $0.00

DRAFT
2020-11-05 - EXP-0000001239 ...
Total: $100.00

More (1)

Actions

Expense Report >
Favorite >

Expense Report
00385365

Edit
Cancel
Copy
Print

Draft

cel Expense Report   EXP-0000385365 ...

	Status	Personal	Prior Balance Applied	Cash Advance Applied	Reimbursement	Total
ee: Olayinka Makanjuola	Draft	0.00 CAD	0.00 CAD	0.00 CAD	0.00 CAD	0.00 CAD

Report Number   EXP-0000385365

(empty)

P000

ny   UBC The University of British Columbia

Report Date   ★ 2023-05-08

Tax   ★ ✓

rsement Payment Type ★ Direct Deposit

Report Line Date	Expense Item	Extended Amount
		No items available.

OK   Cancel

New Procurement officer Security Role and Rename of Requisition Type

A new Workday security role, Procurement Officer, has been created for Financial Operations to help the Procurement Sourcing team efficiently manage purchase requisitions that are over a certain amount or require a competitive bid process. When employees submit a purchase requisition with a total cost of over **$75,000** Canadian dollars (including taxes), the new security role will allow requisitions to be automatically routed to a Procurement Officer to review and approve, removing bottlenecks in the existing process.

Contact: Ryan Chernoff, Procurement Officer (UBCO)
ryan.chernoff@ubc.ca

Note: the requisition type Single Source Requisition was recently renamed to Direct Award/Single Source Requisition for clarity.

Inbox Task for Match Exceptions Missing Receipts

UBC Employees who request goods and services will now receive a new Inbox item, Create Receipt for Purchase Order, when there is a match exception error due to a missing receipt. This occurs when an invoice is issued for a Purchase Order (PO), but the invoice amount doesn't match the amount of goods/services received in Workday.
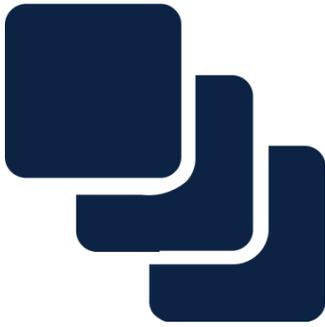
This new Inbox item allows the requestor to Create Receipt for the PO directly from your Inbox, making the process easier and more efficient. The PO number for the invoice appears in the Inbox task, and clicking 'Okay' creates a draft receipt that they can then complete, or leave as a draft and submit later.to Create Receipt for the PO directly from your Inbox, making the process easier and more efficient. The PO number for the invoice appears in the Inbox task, and clicking 'Okay' creates a draft receipt that they can then complete, or leave as a draft and submit later.

Requestors can view the invoice details (if required) by clicking on the Event link, and additional instructions on next steps are provided in the Inbox item as well.

Resolve Match Exception – Missing Receipt

Cancel of Edit a Draft Receipt

Create Receipt of Goods & Services

New Ability to Use a Single Job Requisition to Post and Recruit for Multiple Positions

A single job requisition can now be used to post multiple identical positions on the UBC Careers website (one job posting will be visible with multiple available positions). Successful candidates can be hired through this same job requisition during the recruitment process. To use one job requisition, the positions must have identical position restrictions (salaried/hourly, ongoing/term, full-time/part-time etc.), but when hiring successful candidates, the start dates and compensation details can differ per candidate.

A single job requisition can be used to post multiple staff, student or faculty positions, but it is recommended to first check with Faculty Relations if using this method for faculty.

Create Job Requisition and Post – Multiple Positions

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. If you have new faculty starting, it is a good idea for them to set up their delegations to create expense reports on their behalf.

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

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

Previous Engagements & Resources

Topic: **Non-PO Invoices, Supplier Invoice Requests & Expenses**
[Presentation Slides](#)
[Recording](#)

Resources:
[July Newsletter](#)
[New Hybrid Work Agreement](#)
[View my Professional Development Fund](#)

<u>Workday Wednesday Sessions:</u>
Topic: Indigenous Finance Guidelines
Date/Time: September 20, 2023 | 10:00 am
[Meeting Link](#)

Topic: **Supplier Set Up & Payment Options**
Date/Time: Oct. 4, 2023 | 10:00 am
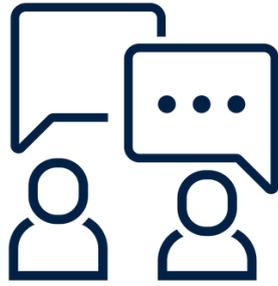[Meeting link](#)

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

Topic: **Introduction to Procurement 101**
Date/Time: October 25, 2023 | 10:00 am
[Meeting Link](#)

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