

IN THE KNOW

UBCO Finance Operation's Newsletter

Finance Operations Updates and
Important Information



NEW FORM TO CAPTURE PRIVACY AND ETHICS INFORMATION ON SOME TYPES OF PURCHASES



When creating purchase requisitions for items or services that may require privacy, information security or ethics review, requestors will now see a short, three-question form in Workday to complete before submitting the requisition.

The form will screen for purchases that will involve integrations or access to UBC systems, or access to or storage of UBC information, student data or personal information. This will ensure that risk management procedures are in place, including proof of Privacy Impact Assessment (PIA) or Ethics Board Review.

The information collected through the form will help to expedite the process of Buyer approval of these types of purchases by mitigating the need to manually collect privacy and ethics information outside of Workday.

NEW IN WORKDAY: FUNCTIONALITY TO FIND DRAFT RECEIPTS FOR GOODS AND SERVICES RECEIVED



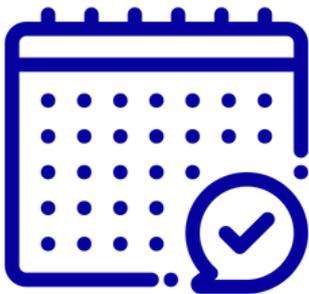
The ISC and UBC Procurement have developed new functionality in Workday to alert faculty and staff when they have draft receipts for goods and services received. This will help to reduce the amount of unattended or duplicate draft receipts in Workday and the need for the Procurement team to manually cancel them. The changes include:

- **Monthly draft receipt notification:** If you initiate receipts in Workday but leave them in Draft status, you will now receive a Workday Notification once a month to draw your attention to the draft receipts. The notification will suggest that the receipts be edited, submitted or cancelled.



- **‘Edit Existing Draft Receipt’** checkbox on Create Receipt task: When creating a receipt for a Purchase Order (PO), the ‘Edit Existing Draft Receipt’ checkbox will now be automatically checked on the task if you have already started a draft receipt for the PO. You will have the option to edit, cancel or submit the receipt if you were the initiator of the receipt.
- **Edit Existing Draft Receipt’** checkbox on Supplier Match Event - Missing Receipt: If you receive Supplier Match Event – Missing Receipt task and a draft receipt exists for the PO in Workday, an ‘Edit Existing Draft Receipt’ checkbox will now appear and be automatically checked on the task. If there are multiple draft receipts, an Alert message will list the receipt numbers along with instructions on how to process the various receipts for the Match Event.

HOURLY WORKERS NOW ONLY SUBMIT ABSENCE REQUEST FOR PAID TIME OFF



Effective August 24, **UBC hourly staff will only need to submit an absence request in Workday when taking paid time off.**

Previously, in addition to submitting an absence request, hourly staff were required to submit scheduled working hours through time tracking in order to be paid. This change will help save time when requesting paid time off.

Retroactive absence requests prior to August 24, 2024

When retroactively submitting an absence request for time taken off on a date prior to August 24, 2024, the old process should be followed: submit scheduled working hours through time tracking in addition to an absence request.

Exception for unionized staff taking time off involving shift premiums

When CUPE 116, CUPE 2950 and BCGEU Okanagan hourly staff take certain types of time off during hours that are eligible for shift premiums (e.g. working evenings, nights, or weekends), it will be necessary to enter any shift premiums in time tracking in addition to the absence request. See the Appendix of Entering Time (Hourly Staff) in the Workday Knowledge Base for specific guidance on which types of time off will still require both time tracking and an absence request in order to be paid for shift premiums.

More info: [Workday - Workday This Week \(service-now.com\)](#)

NAVIGATING PURCHASING AT UBC: THE PURCHASING PRIMER

A high level introduction to Procurement video has been created for people new to UBC or new to purchasing at UBC. This helpful 9 minute video provides a quick map of UBC's purchasing processes: <https://finance.ubc.ca/procure-pay/private/training>

WELCOME RYAN MATTHIES, PROCUREMENT OFFICER

UBCO Finance Operations is pleased to welcome Ryan Matthies, who joined UBC as of Aug 22, 2024, as our Procurement Officer!

Ryan comes to UBC with more than 15 years' experience in the Canadian Armed Forces, including active deployments overseas. Ryan has a Masters in Operations and Supply Chain Management, and a Bachelor of Arts (Strategic Studies). We are excited to see him apply his public sector knowledge, leadership, and logistics skills in his roll as Procurement officer.

Please join us in welcoming Ryan to UBC!



IMPORTANT REMINDERS



VENDOR BANK ACCOUNT CHANGES

Vendors cannot make bank account changes in Workday themselves; someone from UBC needs to create the change request in the system. This can be done by the Department Admin or Procurement.

AP can't make the changes and shouldn't for obvious audit/fraud reasons. However, noting that vendors may inform UBC of any changes on an invoice submission, we are implementing a process where if this is the case Procurement will be notified by AP to assist.

However, if the Department is notified directly they can make the change. If you are unsure about how to make a change please reach out to your Buyer for assistance or follow the [Supplier Change Request - None Contact Info](#) KBA.

Vendors will need to complete the EFT change forms found at [Payment Standards | UBC Finance](#) for either Canadian or US vendors. There is also a link on the same page for vendors outside Canada and the US using the GDS (global disbursement service). Just choose the form according to the vendor location. This form will need to be attached to the change request. This is the same form required at set up.

Same verification process will apply for change in bank details as is required in set up. A void cheque or a stamped letter from the bank or a stamped e-cheque will be required to make the change.

If there is a bank account change and there are pending payments please reach out to Procurement to assist in making sure the payments will not be processed prior to the bank change being made.

Please contact the Procurement team if you have any questions around this.

COST CENTRE RECEIVERS



If a Cost Centre Receiver (CCR) is not the initiator of a draft receipt that needs to be edited, cancelled or submitted, the CCR will not be able to alter it. They will need to contact the Buyer to cancel the existing draft and then the CCR can create a new receipt for the PO.

More details on this change, and links to relevant resources, are available in the Workday Knowledge Base through [Workday This Week](#).

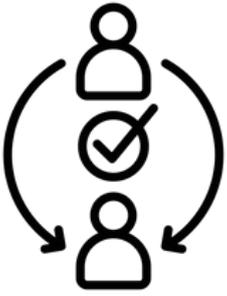
WORKDAY ADDRESSES



Central Receiving and Mail Services (CRMS) would like to remind Department Admins to review all Departmental Staff and Faculty Addresses in Workday to make any required adjustments. Staff and Faculty cannot make these changes themselves, it requires the HR Analyst Security Role.

For faster package delivery, it helps CRMS to deliver packages to the right place the first time!

UPCOMING TRAINING:



PLANNING YOUR PURCHASING JOURNEY AT UBC: THE PO PROCESS

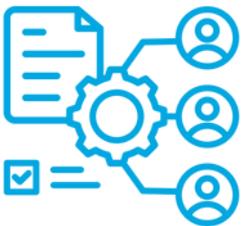
Does needing to purchase goods and services leave you feeling lost? “*Planning your Purchasing Journey at UBC: The PO Process*” helps you navigate our purchase order process and requirements efficiently, ensuring smooth purchasing travels from start to finish.

Thursday September 19th, 2024 at 11:00 am

<https://wpl.ubc.ca/browse/financial-operations/courses/planning-your-purchasing-journey-at-ubc-the-po-process>

Registration is required, and these sessions fill up quickly. If you are interested in attending, please make sure to register to ensure your spot for this training session.

DRIVING PURCHASES BEYOND PO'S AT UBC, HIGH VALUE PURCHASING



This session builds on the purchase order process to assist faculty and staff involved in high value purchasing of goods and services; ensuring all requirements are addressed effectively within UBC’s guidelines and understanding what to expect when involved with purchases over \$75,000.00.

This session is not a functional walk through or demonstration of completing tasks in Workday. This session focuses on the business processes and policies providing the context for required tasks in Workday. Stay tuned – **registration to open soon.**



WORKDAY WEDNESDAY SESSIONS

The Zoom links for the Workday Wednesday Sessions are now all the same link. Topics are found below for the next month, as well as posted on the “Events” calendar on the Workday Admins Team Channel.

Registration is not required, please copy link and session details to your calendar.

Workday Wednesday Zoom link:

[https://ubc.zoom.us/j/64655437858?](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSgzxM2htY1kwdEtMz09)

[pwd=ZDZybEZmNHJKSgzxM2htY1kwdEtMz09](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSgzxM2htY1kwdEtMz09)

Meeting ID: 646 5543 7858

Passcode: 857874

TOPIC: FOREIGN WORKERS AND THE PERMANENT RESIDENCY EMPLOYMENT VERIFICATIONS

DATE/TIME: WEDNESDAY, SEPTEMBER 25 | 10:00 AM

TOPIC: UNDERSTANDING YOUR PAYROLL

DATE/TIME: WEDNESDAY, OCTOBER 2 | 10:00 AM



VANCOUVER LED WORKDAY TRAINING

TOPIC: SETTING UP A SUPPLIER: FOUNDATIONAL OVERVIEW

This course will help new and existing staff and faculty understand the basics of a supplier, including determining the correct payment method for a supplier, and the steps to setting up a supplier in Workday.

SEPTEMBER 17, 2024

OCTOBER 22, 2024

NOVEMBER 19, 2024

JANUARY 21, 2025

[REGISTER THROUGH WPL](#)



PREVIOUS ENGAGEMENTS

To review previous Workday Wednesday Sessions and the available resources, please visit [here](#).

RESOURCES

Below are some new knowledge base articles for your reference:



[Edit an Employment Agreement Before Signing \(Recruitment Hire\)](#)

Published: August 29, 2024

- This new article shows how the candidate or other reviewers may send back an Employment Agreement (generated during a Recruitment Hire), in some circumstances, to make edits before signing.

[Recruitment Hire](#)

Published: August 27, 2024

- Summary: Article updated to include information about when to use an alternate business process (Change Job Extension) in order to retain an employee's continuous service date and time in position.

[Performance Enablement \(GPS\): Check-Ins](#)

Published: Aug 20, 2024

- This new article was created to support UBC's new performance enablement program, and shows how to create and edit Check-Ins in Workday.

[Previous Newsletter](#)

[Workday This Week](#)

[KBA: Workday Assistant](#)

[Navigating the Workday Home Page](#) (Updated)



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

