

INTEGRATED RENEWAL PROGRAM

Faculty Town Hall: IRP Program Update

September 24, 2020



TODAY'S AGENDA

1

Welcome

2

IRP Overview

3

What's Changing with Workday

4

Preparation for Go-Live – Cut-off dates

5

Integrated Service Centre – Post Go-Live

6

Next Steps / Questions and Answers



IRP OVERVIEW

Integrated Renewal Program (IRP) – Workday

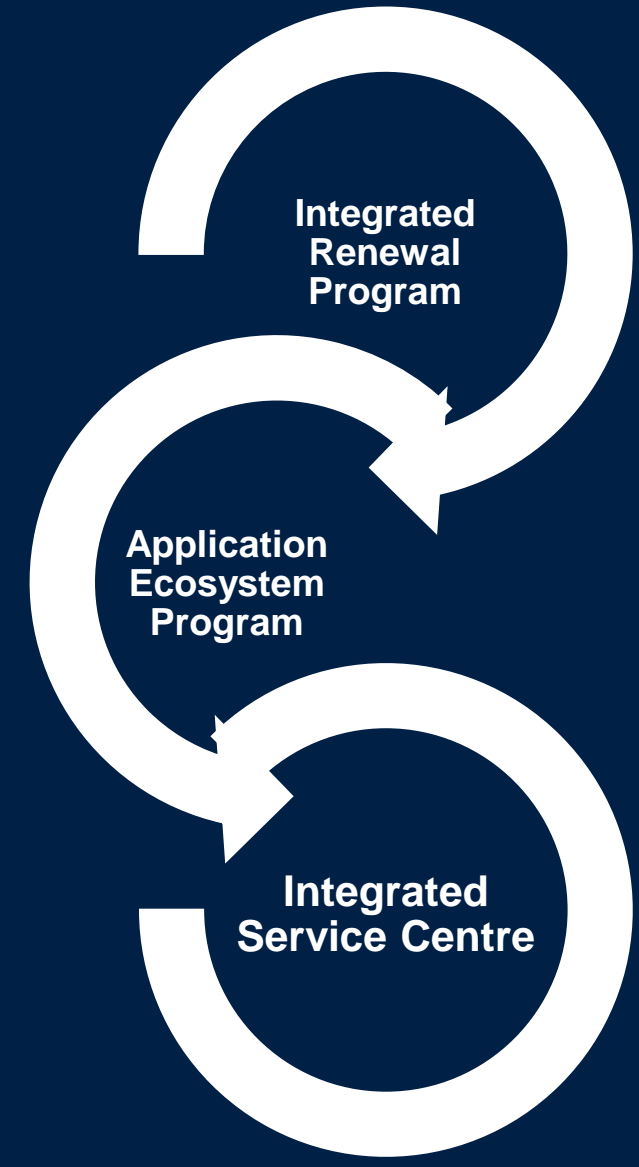
- An integrated system for UBC's core Human Resources, Finance and Student administrative systems
- Online transactions and single source of data to inform decision-making and planning

Application Ecosystem Program (AEP) – Applications surrounding Workday

- Applications surrounding Workday are dispositioned appropriately to maintain business continuity
- Applications have been identified to be either retrofitted, integrated or sunset.

Integrated Service Centre (ISC)

- The ISC will provide ongoing integrated services to the UBC community to ensure a cohesive, collaborative, and enriched experience for students, staff and faculty.
- Key functions:
 - ✓ To provide support to the UBC community when using Workday
 - ✓ To deliver improvements to Workday over the long term
 - ✓ Determine what this looks like for Okanagan and how Okanagan will interact with the ISC



WHAT IS IN SCOPE?*

Go Live November 2, 2020



HUMAN RESOURCES

- Benefits
- Compensation
- Core HR Management (incl. Onboarding/Off-boarding)
- Payroll
- Recruitment
- Workforce Management – Time & Attendance



FINANCE

- Budget Development (core to Workday)
- Capital and Asset Accounting
- Endowment Accounting (UBC Methodology)
- Forecasting (Workday Planning)
- Institutional Accounting
- Procure to Pay
- Research/Post Award Grants Administration
- Revenue Accounting
- Treasury and Cash Management
- Travel and Expense

*Scope areas listed have budget approval. This is a multi-year program and new functionality will be introduced to meet UBC's evolving needs in subsequent years.



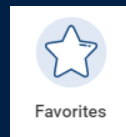
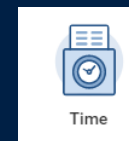
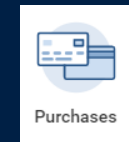
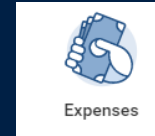
WHAT'S CHANGING WITH WORKDAY

- Workday is available wherever an internet connection exists; NO VPN
- Employee self service functions now will be available through Workday (view/update personal information, benefits, direct deposit, etc.)
- Workday mobile APP: allows ability to approve transactions, take pictures of receipts for submission to expense reports
- Workday “Search” functionality: easy to search for people, tasks, reports, business data
- All employees, including students, will have a unique position and number
- View Organizational Structures: Visual depiction of org charts, including names and role
- Delegation of tasks: Delegate your entire Workday inbox or specific business processes for a specified period of time
- Reassignment of tasks: Reassign your own tasks from your Workday inbox to others, as needed



WHAT'S CHANGING WITH WORKDAY

- **'Workday Expenses'** replaces OPT, Q-Req, TR-Req to pay invoices, reconcile UBC credit card and request personal reimbursements
- **'Workday Purchases'** replaces the use of e-Procurement form; Request purchase orders, receive goods/services, pay invoices and track status
- Automated 3-way matching of Purchase Order, receipt of goods/service and invoice triggers payment
- Transactional Approvers (managers of people and/or budget) can see all pending transactions in their Workday inbox instead of relying on emails or paper forms
- No more paper timesheets; hourly employees can enter their time directly into Workday
- Staff Absences/Vacations recorded and tracked in Workday
- Add common tasks, reports to **"Favorites"**



WHAT'S CHANGING – ACADEMIC APPOINTMENT

“Tracks a faculty academic relationship such as start/end dates, rank, title, tenure status, academic unit”

- All teaching faculty, and those that have promotions that need to be tracked (Tenure stream, Librarians, Sessionals, TAs, Adjuncts, Lecturers, PostDoc Teaching Fellows) will have an academic appointment
- May hold more than one academic appointment
- All employees will also have a Position in Workday; compensation is tied to the faculty's Position
- Joint appointments can be tracked using academic appointment



WHAT'S CHANGING – TERMINOLOGY

One page quick reference documents will be available for new terminology

Examples:

Current Term FMS/HRMS	Workday
Chartfield	Worktag
DeptID	Cost Center
PG (project/grant)	Grant Program Gift Project
Account Code	Ledger account + Revenue/Spend category
HRMS Dept ID	Supervisory Organization

Preparing for Workday:

TRANSLATION TOOL

Find your Workday Worktag by entering your current FMS PG or speedchart

Workday's Naming Convention for Grants

*Speedchart_GR0000XX_Sponsor Short Name_Year
of Application_Grant Recipient's Last Name*

Ex. ABCD GR000267 CIHR 2018 Brown



GRANTS MANAGEMENT

RISe: Used for *pre-award administration*; RISe will be interfaced with Workday

Grant Management: Used for *post-award administration including reporting & close-out*

Some changes:

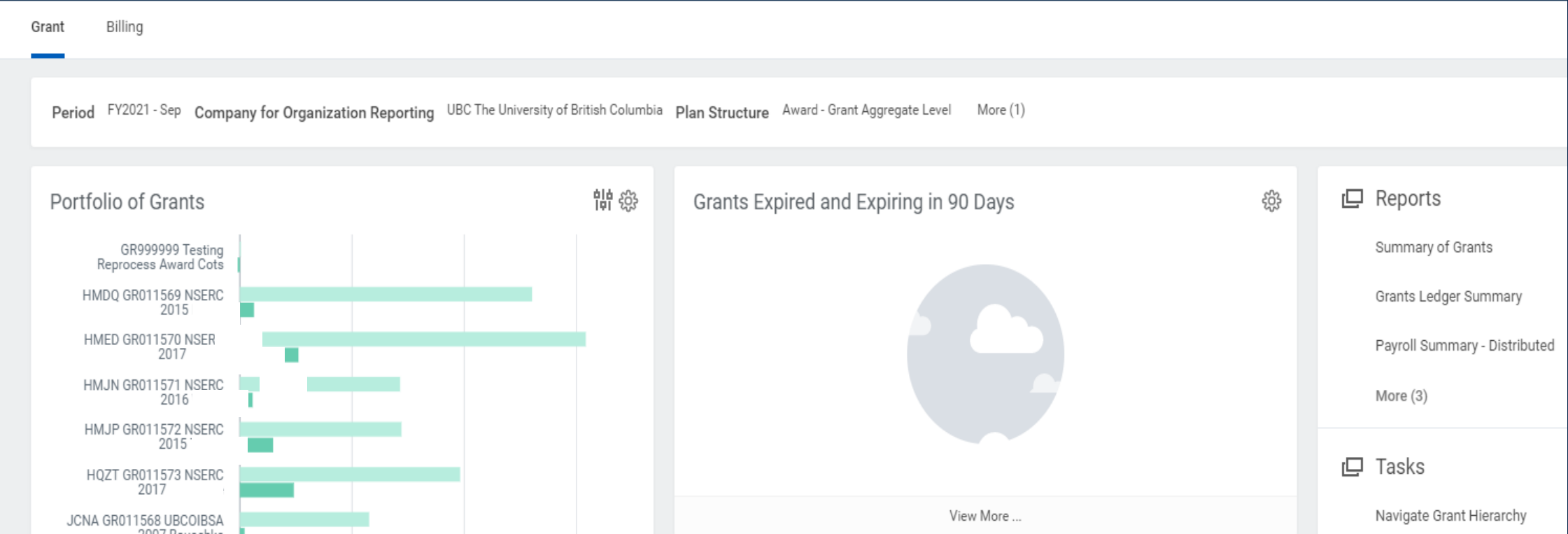
- Funding accounts can be viewed in **real time**.
- Indirect costs or overhead calculated real-time as expenses incurred
- Provides an integrated view of HR & Finance information (e.g., expense reports, procurement of goods and services and employee lifecycle) to help with decision making



GRANTS DASHBOARD

All grant holders will have access to a grant dashboard

Research Grants Dashboard



PAY DATE SCHEDULE TO CHANGE FOR HOURLY WORKERS

Starting in November 2020, pay dates for all hourly staff and students will change to the 15th and last day of each month to align with salaried employees.

Pay Period	Time-Sheet Cut Off	Appointment Notice Cut Off	Pay Day	Change
October 16-31	October 28	October 22	November 8	Payment is two days later than original schedule of Nov 6. This is the last catch-up payment from the existing HRMS system. Hourly workers should enter forecasted hours for Oct 29-30 to submit the time-sheet by Oct 28.
November 1-8 <i>Shorter pay period</i>	November 9	November 6	November 15	Payment is one week earlier than original schedule of Nov 23 and accounts for a shorter pay period. This is the first payment from Workday on the new pay schedule.
November 9-23	November 23	November 20	November 30	This is the first payment on the new schedule accounting for a full semi-monthly pay period. All subsequent payments will be on this new semi-monthly schedule.



IMPORTANT DEADLINES BEFORE WE GO LIVE!

Function	Task	Deadline**	Interim Process/Notes
UBC Visa Card	CREATE VISA card reconciliations in OPT	October 12	Any OPT transactions not reconciled in OPT will revert into Workday as unreconciled
UBC Visa Card	APPROVAL of VISA card transactions	October 22	Any OPT transaction not completely approved through OPT will revert to being unreconciled in Workday and any approvals will be lost and will need to be redone in Workday Expenses
SmartForms (Q-Req, TR-Req), Manual Forms	Submit non-PO invoices to Finance	October 9	Expenses incurred after this deadline should be held and process in Workday
E-Procurement	Submit e-Procurement request for POs and change orders	October 5	UBC credit card can continue to be used for purchasing after this date
E-Procurement	Submit invoices for payment on PO	October 5	Any invoices received after this date can be sent to Finance for processing in Workday
HR	All appointments due to payroll	October 13	The appointments should have gone through the entire workflow approvals to make the 31 st October payroll run. Initiate appointments (both salaried and hourly) via eRecruit, epaf, SAF/FAF, no later than Oct 5 th .
Grants	Requests for Research PGs, Grant PGs	October 5	If PG does not exist, use an existing PG to post transactions

** These deadlines allow time for central processing.



WORKDAY TRAINING RECOMMENDED FOR FACULTY

Self-serve training courses available

For all faculty members

- Workday Basics ~45 min.
- Workday for Faculty ~30 min.

If you manage a team

- Workday for Managers ~45 min.

If you manage a grant

- Workday Grant Manager, PI ~60 min.

If you submit expenses or buy goods/services

- Workday Finance 101 (Expenses) ~60 min.
- Workday Finance 301 (Procurement) ~60 min.

OR

Instructor-led webinars

Workday for Faculty (45 min.)

- Sept 29
- Oct 8
- Oct 13
- Oct 22
- Oct 27

Finance 101 (Expenses) - 60 min.

- Sept 21
- Oct 5
- Oct 19

Finance 301 (Procurement) – 60 min.

- Sept 23
- Oct 14
- Oct 28

Workday for Managers - 60 min.

- Sept 30
- Oct 7
- Oct 14
- Oct 21

Workday Grant Manager, PI - 60 min.

- Oct 20
- Oct 22
- Oct 27
- Oct 29
- Other dates TBD

Note: See Workplace learning website for other self service and webinars are available



INTEGRATED SERVICE CENTRE (ISC) - WORKDAY SUPPORT SERVICES



Once Workday goes live, the ISC will be the point of contact for Workday related questions, issues and requests. Specifically, the ISC will provide five types of support services:

1

Support with Using Workday



Find out how to navigate, use, and complete tasks within Workday.

2

Resolving Issues with Workday



If you are experiencing issues or errors when using Workday, you will be able to contact the ISC to help resolve them

3

Requesting Workday Access



Request access to additional functionality or information you need in Workday

4

Resolving simple / basic, HR, Payroll, & Finance questions

Ask us simple questions about HR, Payroll, and Finance processes and policies. We can help answer them or route them to the proper team within each area.

5

Referring to other Help Desks or support services

We can support with referring you to the right place to get help



ACCESSING WORKDAY SUPPORT



**Connect with your
Transition Lead or
Captain; Finance
Manager, HR Advisor**



**Search the knowledge
base**

*Find answers quickly using our
searchable knowledge base*



**Submit a ticket in
ServiceNow**

*Submit and track the status of
your queries*



Talk to a representative

*Connect with ISC service
representatives to receive direct
support*

Example queries:

“ How do I login to Workday? How do I request time off? How do I change a beneficiary or dependant?
How do I access my T4? How do I submit time and expenses? ”

Once Workday launches, access support here <https://ubc.service-now.com/selfservice>



HOW IS SUPPORT AT UBC CHANGING?

Once Workday goes live, the Integrated Service Centre (ISC) will be the point of contact for Workday related questions, issues, and requests.

What *will* change due to the ISC?

- ISC will be a new point of support for **Workday** related queries, issues, and requests.
- The ISC will be responsible for maintaining and sustaining Workday in an integrated fashion with IT, HR, and Finance
- The IT self-service portal will become the “UBC self-service portal” and will include access to Workday related support (e.g., self-serve knowledge base, submitting a ticket, or request access).

What *won't* change due to the ISC?

You will still be able to access the following services for your usual support:

- IT Service Centre
- HR and Finance advisory support
- Administrative support
- Facilities support
- Campus security
- Salesforce
- Other services not related to the Workday application or Workday support



Next Steps



☐ **Take Workday Basics and Workday for Faculty training at wpl.ubc.ca**

- ☐ Explore other Workday training courses that may be relevant to you (e.g. Workday for Managers, Workday for Grant Managers)
- ☐ Optional Instructor-led webinars are scheduled through to Go-Live to supplement your learning
- ☐ Read faculty specific information provided to you by your Transition Lead, such as how to access Workday when we go live; how to set up delegates and viewing your grant dashboard
- ☐ **Connect with your [Transition Lead](#) if you have questions**
- ☐ **[Sign up for the IRP Newsletter for more information and program updates](#)**



Questions



THANK YOU

