Workday Implementation: Key Changes

1. How we refer to grants and other funding sources will change with the introduction of Workday. Peoplesoft Chartfields will be converted to Workday worktags. This translation tool is a handy way to find your new worktags: https://finance.ubc.ca/peoplesoft-chartfield-workday-fdm-worktags

2. Speedcharts for existing grants will be carried forward into Workday, and new grants will continue to be issued a speedchart. The name given to grants in Workday will be standardized as: [Speedchart] [Workday Grant #] [Sponsor] [Year applied] [PI Last Name] (e.g. ABCD GR000352 CIHR 2018 Smith)

3. Approval requests will now be in your Workday inbox and not in your Outlook inbox. You can configure your settings to receive an email notification in your Outlook inbox when something comes into your Workday inbox. (More details will follow on this).

4. You can delegate a task (e.g. approve a specific employee expense) or a function (e.g. all employee expenses) and more, all from the comfort of your own Workday inbox.

5. Credit cards will be reconciled strictly within Workday.

6. After go-live, you can assign the role of Grant Financial Analyst to support staff. This role will allow the individual to see the budget and actual expenses but not the payroll details. This is a view-only role and does not allow approval.

7. The concept of “PG signing authorities” does not exist within Workday. If there are multiple “Grant Managers,” every Grant Manager will get the same notice to approve an HR or Finance request. Once we go live, you may want to add or delete Grant Managers in order to meet your lab’s needs.

8. Hourly employee hours are assigned within Workday. Hourly employees will enter their hours in Workday, then the PI or timekeeper will approve hours (this process must be followed for the employee to be paid). Hourly employees are paid on the 15th and last day of the month. Hours approval is required one week before the pay period.

If you have any further questions about Workday implementation, don’t hesitate to reach out at sbme.workday@ubc.ca.