

IN THE KNOW

UBCO Finance Operation's Newsletter

Finance Operations Updates and
Important Information



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WORKDAY ENHANCEMENTS



The Integrated Service Centre (ISC) continually updates Workday to align with UBC's evolving needs, incorporating feedback and collaborating with different units, faculties, and departments. For an update on planned enhancement, visit the ISC's [Workday Enhancements](#) website.

NEW PROCESS FOR SUBMITTING EXPENSES ON BEHALF OF STUDENTS

UBC employees who submit expenses on behalf of UBC students can now submit these expense reports using student records in Workday. Expense reports for students are still initiated using the Create Expense Report for Non-Worker task in Workday, but the UBC Student External Committee Member (ECM) Web Form has been retired.

Tips for Student Expense Report Initiators (SERIs)

- It's recommended to search for a student record using the student number rather than the student's name to ensure you pick the correct person, as a name may return many results.
- Before submitting an expense report for a student, encourage them to add their direct deposit information in Workday as this allows for faster and more efficient payment.
- If the student does not have a Canadian bank account for direct deposit, ensure they check their Primary address in Workday is correct, as any cheques will be sent to this address.
- Be sure you have all the information you need to complete the expense report prior to initiating the task in Workday, as you will not be able to access any drafts created using Save For Later, or view or update a submitted expense report.



Note: Students who are employed by UBC are able to submit their own expense reports in Workday for employment-related expenses. For expenses related to their studies, students and student employees should be reimbursed through this process, to ensure expenses are reviewed prior to being submitted.

UPDATES TO ACCESSING HELP WITH WORKDAY



UBC employees have a new way to access Workday support while logged in to Workday.

Faculty, staff, and student employees can now use the Resources + Support link in the Global Navigation Menu to access information on Workday Support, the Workday Knowledge Base, Workday training, and Workday This Week on the ISC website.

Employees can add direct links to other resources using Shortcuts. Some options are:

- Get Workday Support
- Workday Knowledge Base
- My UBC Workday Training

Note: You cannot create your own shortcut links, but there are a range of links already available.



External Links



Resources + Support



Scroll down to bottom of Menu for External Links

+ Add Apps

≡ Edit

JOB POSTINGS ON CAREER SITES NOW SHOW LAST DAY AND TIME TO APPLY



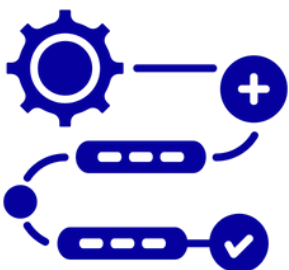
To reduce confusion regarding the application deadline for candidates applying to a job at UBC, a job's Posting End Date, visible on internal and external UBC Career sites, now displays the exact date and time applications close (the last day a candidate can submit their application).

For example, instead of a posting showing an end date of July 1 with a note explaining that applications will be accepted until 11:59 PM on the day prior, it will now display as June 30, 11:59 PM. This reflects the actual closing date of the posting and will reduce confusion on when someone needs to apply by.

This change will help to ensure that candidates do not miss a deadline to apply for a job with UBC.

Note: There is no change to how an HR Administrator selects a posting's End Date when creating and posting a job requisition in Workday. Instructions in relevant Knowledge Base Articles are updated to clarify how the End Date displays information on careers sites.

INTERNAL SERVICE PROVIDER REQUEST PROCESS STREAMLINED




The Internal Service Provider (ISP) request form in Workday, which is used to create new or modify an existing ISP, is now updated to help streamline the submission process.

Requests to create new ISPs will now require identification of an ISP Manager and will route directly to the Finance Director for approval of the security change.

Previously, ISP managers could only be assigned through a security request outside of the process in Workday.

NEW 'CAPITAL INSTALLATION SERVICES - NON-RESIDENT' SPEND CATEGORY IN WORKDAY



A new Spend Category, Capital Installation Services – Non-Resident, is now available in Workday to use for installation services in conjunction with tangible Capital asset purchases (i.e., a purchase using one of the spend categories below) from non-resident suppliers. Use of this Spend Category will ensure withholding tax is applied correctly.

Tangible Capital Spend Categories:


- Equipment | Between \$5,000 and \$100,000 single piece of equipment
- Equipment | Over \$100,000 per Unit Cost
- Artwork and Artifacts

Administrators should create an accounting journal if the installation services expense needs to be reclassified as a capital expense. For more information, see [Capital Accounting](#) on the UBC Finance website.

PERIOD END DEADLINE AVAILABLE FORUNE, JULY, AND AUGUST

Month End / Year End [Important Dates feed](#)

FINANCE KUDOS



Finance would like to congratulate the following individuals, who were nominated by members of the department, in recognition of their achievements in the following categories.

- Candice Young – Leadership
- Richard Washington – Leadership
- Anita Friesen – Team Player
- Stacey Broderick – Above and Beyond

REMINDERS



REVERT TO GRAY DEPOSIT BAGS AS NEEDED

Due to the high demand for RBC green deposit bags across BC the supplier has encountered challenges to meet the demand. RBC has agreed to allow the use of the old grey bags following the below procedure:

- Once you run out of green deposit bags, you can use the old gray deposit bags
 - To identify the deposit as HSBC write the word “Purple” using a marker or smudge-proof pen
 - RBC will soon supply purple stickers, which can be applied, and will negate the need to write “Purple”
 - If you need gray deposit bags please contact the Bookstore
- Once UBC fully migrates to RBC, purple stickers will no longer be required, and grey bag usage can continue

EMPLOYMENT VERIFICATIONS FOR PERMANENT RESIDENCY



Employment verifications for Permanent Residency (PR) are not provided by the faculty. UBCO employees should submit a request for PR employment verification from Payroll through the [UBC Self Service Portal](#):

Once in the portal, select:

- Request a Service
- Select Request General Workday Support
- Fill in your information
- Select Campus: UBC Okanagan
- Select Category: Payroll
- Select: Employment Verification

In the Description category, indicate that they are requesting employment verification for PR purposes. Please note that PR employment verification letters can take a minimum of 10 business days to complete.

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=ZDZybEZmNHJKSzgxM2htY1kwdEtMZz09)

[pwd=ZDZybEZmNHJKSzgxM2htY1kwdEtMZz09](https://ubc.zoom.us/j/64655437858?pwd=ZDZybEZmNHJKSzgxM2htY1kwdEtMZz09)

Meeting ID: 646 5543 7858

Passcode: 857874



TOPIC: WORKDAY NAVIGATION - TIPS AND TRICKS

This session will cover and review tips and tricks for navigating, using, and understanding Workday, with an opportunity for Q&A.

DATE/TIME: WEDNESDAY, JUNE 19 | 10:00 AM

VANCOUVER LED WORKDAY TRAINING



TOPIC: REIMBURSING EXPENSES - “CARPE PER DIEM”

Reimbursing Expenses - “Carpe per Diem” is an online course offered by UBC, which is being provided to assist you in ensuring you have a broad understanding of expense reimbursement requirements.

Date/Time: Tuesday, June 18, 2024, 11:00 am

Enrollment required; please register [here](#) through WPL.

Additional dates available through WPL for this course.

TOPIC: PLANNING YOUR PURCHASING JOURNEY AT UBC: THE PO PROCESS

Planning your Purchasing Journey at UBC, “The PO Process” is an online course offered by UBC, which is being provided to help you navigate our purchase order processes and requirements smoothly and efficiently.

Date/Time: Thursday, June 27, 2024 | 11:00 am

Enrollment required; please register [here](#) through WPL.

Additional dates available through WPL for this course.

PREVIOUS ENGAGEMENTS

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



RESOURCES

[Previous Newsletter](#)

[Workday This Week](#)

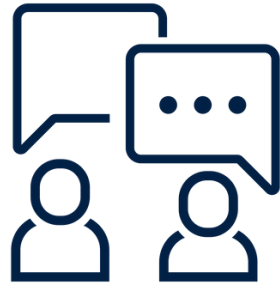
[KBA: Workday Assistant](#)

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

[Create Job Requisition and Post - Single Position](#) (Updated)

[Create Job Requisition and Post - Multiple Positions](#) (Updated)

[Extend a Job Posting](#) (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

