WORKDAY CHEAT SHEET

WORKDAY - INTEGRATED RENEWAL PROGRAM TRAINING
https://irp.ubc.ca/training
Who does this apply to: EVERYONE!

Workday Basics - helps you navigate the homepage, configure applications, use search function, practice in the Sandbox. Workday Mobile App available at Go-Live, Nov 2nd.

Workday Managers: For All Researchers
https://blogs.ubc.ca/ubcworkdayjobaids/archives/category/travel-expense-management

Travel & Expense Management - most of the training in this category applies to all grant holders. Pay attention to FIN101-02 (For PCard holders, THIS IS A NEW REQUIREMENT because currently PCards are posted automatically to a default PG. **In Workday, the cardholder needs to manually post the transactions.** If not, your PCARD/Visa transactions will not get rolled over to your worktag. They will always appear to be outstanding until reconciled). If you do not do this regularly, your card may be revoked.

UBC Visa card holders and those who previously held AMEX cards will be familiar with the need to make an expense claim. This will need to happen in Workday as of November 2

Workday Budget Owner:
This course equips budget owners such as Cost Center, Program, Gift and Grant Managers with the necessary knowledge in Workday to review, update and approve requests that arrive in their Workday inbox. This two-part course covers approvals related to Travel and Expense Management, Supplier Accounts and Procurement, Customer Accounts and Revenue Accounting, Financial Accounting and Institutional Accounting as well as Banking and Settlement.

Supplier Accounts & Procurement
FIN100-02 - Expense reporting - expense delegation and initiating as a delegate. (You can assign a delegate(s) to initiate and edit your Expense Reports on your behalf, for a specified period of time. The delegate will have access to view your previously created expense reports and your UBC credit card transactions).

ISD - Internal Sales Delivery - Standing Order
https://blogs.ubc.ca/ubcworkdayjobaids/archives/5691

JOB AIDS - QUICK REFERENCE GUIDES (step by step guides)
https://blogs.ubc.ca/ubcworkdayjobaids/

WORKDAY CHEAT SHEET

POINT OF CONTACT - ISC (INTEGRATED SERVICE CENTRE) - 604-822-8200 - https://isc.ubc.ca

- **Online Training:** https://wpl.ubc.ca/browse/irp-training/
- **Job Aids for Specific Tasks:** https://blogs.ubc.ca/ubcworkdayjobaids/
- **Searchable Q&A:** https://blogs.ubc.ca/ubcirpqas/

Toolkit for Staff, Managers and Faculty*: www.irp.ubc.ca/resources/toolkits

HYPERCARE - Scheduled training sessions open from November 2nd onwards

ALL JOURNAL VOUCHERS WILL GO THROUGH FACULTY OF MEDICINE TEAM. Access to Creating Journal Vouchers will be available through MedNet in tandem with Go Live. More information to follow.

UBC's Self Service Portal: After Workday launches on November 2nd, the IT self-service portal will become UBS's Self-Service Portal, including Workday support services.

Translation Tool for Account Nomenclature, ie. Peoplesoft Chartfields to Workday FDM (Foundation Data Model) Worktags:
https://finance.ubc.ca/preparing-workday/private/peoplesoft-chartfield-workday-fdm-worktags

It is important to note that Ledger reports will not be accurate at Go Live. They will be fully updated for the month of October by mid November and for the month of November by mid December.

If you have questions about how to complete certain tasks in Workday, use the following "How Do I…?"

Category	How Do I…Links	Description
Personal Information	View my benefits?	Describes how you view your benefits in Workday.
	View my vacation balance?	Describes how to view your absence balances, including vacation balance.
	View my payslip?	Describes how you view your payslip.
	Change my personal information?	Describes how to change date of birth, citizenship, gender identity and pronoun.
	Update my contact information?	Describes how to change your address, email, and phone contact details for home and work.
	View my T4?	Describes how you find and view T4 information.
	Check my default Cost Centre?	Describes how to confirm your default Cost Center is correct.
Expenses	Get reimbursed for an expense in Workday?	Describes how to get reimbursed for an "out of pocket" expense.

	Approve a vacation/time off request?	Describes how to approve vacation time off.
Team management	View my Org Chart?	Describes how to view your Org Chart. This may also be referred to as your Supervisory Organization or Sup Org.
	View my team's vacation and leave calendar?	Describes how to see your team's vacation and leave calendar.

Additional Resources

Helpful Links

Training

Hypercare Office Hours, Training and Events

Calendar Workplace learning

Searchable FAQs

Support

ISC Self-Service Portal and Knowledge Base

UBC IT

How to know that a Workday email is legitimate

Key Resources

- **Online Training:** https://wpl.ubc.ca/browse/irp-training/
- **Job Aids for Specific Tasks:** https://blogs.ubc.ca/ubcworkdayjobaids/
- **Searchable Q&A:** https://blogs.ubc.ca/ubcirpqas/
- **Toolkit for Staff, Managers and Faculty*:** www.irp.ubc.ca/resources/toolkits

**You may get a Stale Request page after the initial click on these links. If this happens, copy and paste the link into your browser and consider adding as a bookmark.*

Key Support

- **UBC Integrated Support Centre (ISC):** 1-604-822-8200 or https://isc.ubc.ca/
- **Faculty of Medicine Workday Learning Rovers:** ubcenrl-ml-cep4rovers@mail.ubc.ca or View Schedule
- **UBC Workday Training Events:** View Schedule

WORKDAY CHEAT SHEET

Key Changes for Managers and Administrators

PRIOR to November 2, 2020	AFTER November 2, 2020	Job Aid Reference
Approvals via paper forms for HR and Finance processes	Items needing approval will appear in the approver's Workday inbox. Can approve from mobile phone with Workday App.	FIN101-10 Expense Reporting: Manager/Budget Owners – Review and Approval of Expense Report HR Review and Approvals WDB006 – Workday Basics – How to Install Workday App on your Mobile Phone
Multiple signatories on accounts in case of absences or delegation of HR approvals via HRMS for away period	In Workday, you can delegate entire inbox to others or delegate a specific task to someone else for a period of time or as ongoing. Note: delegations cannot be set up through the mobile phone app.	FIN100-02 Expense Reporting: Expense Delegation and Initiating as a Delegate HR116-01 Tasks: Delegation
Qreqs and Treqs for expense reimbursements	In Workday's search bar, type "Create Expense Report" or use the expense icon on the homepage. The expense report will be routed to the Cost Centre Manager for approval. If you want others to complete your expense report, you need to delegate this function to them.	FIN101-13 Expense Reporting: Workday Mobile – Enter Expense (Quick Expense) FIN101-14 Expense Reporting: Workday Mobile – Create Expense Report FIN100-02 Expense Reporting: Expense Delegation and Initiating as a Delegate
PCARDS and monthly reconciliation through Centre Suite	Existing Pcards will be converted to UBC Visa Cards and travel will be allowed on these cards if requested and approved. Reconciliation will be done in Workday by Creating an Expense Report which can now be done when a transaction has been processed rather than on a monthly basis.	FIN101-02 Expense Reporting: Create Expense Report – VISA Reconciliation

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Resident or student reimbursement from a UBC account via Qreq	Only users with the Student Expense Report Initiator security role have access to Create Expense Report for Non-Worker task in Workday. The same users will also have access to the UBC Student Web Form which can be used to request for the transfer of student data from SIS to Workday. If you need access and don't have it, please contact Bethany.saunders@ubc.ca	FIN101-05 Expense Reporting: Create Expense Report – Student/Non-Worker Expense
Managing vendor information for payments in FMS Vendor Centre	Vendors will now be called Suppliers and their information will be managed in Workday.	FIN102-01 Create Supplier Accounts: View/Find Suppliers FIN102-02 Create Supplier Accounts: Internal – Create Supplier Setup
Paying an invoice without a Purchase Order by Qreq and saving paper copies for 7 years.	Invoices are to be submitted to **ubc.invoices@ubc.ca**. UBC Accounts Payable will enter the invoices in Workday and route it to the requestor to provide the worktag information and route it for approval. Invoices must comply with standards including name and department. Paper back-up are no longer required.	Invoice Receipt and Triage Invoice Standards
Purchasing **supplies** less than $3,500 – various ways	In Workday, specifically for supplies *as opposed to other goods and services*, the supplier account is already set up for specific Suppliers (Staples, Fisher Scientific, etc) in a "Catalogue". The Supplier submits an invoice to Accounts Payable (**ubc.invoices@ubc.ca)** with your contact information. To purchase from non-Catalogue Suppliers, you follow other payment methods (PO, Visa card,	FIN102-13 Create Purchase Requisition: Submit Purchase Requisition – Catalogue Info on Catalogues FIN102-14 Create Purchase Requisition: Submit Purchase Requisition – Non-Catalogue

	request invoice, personal reimbursement)	
Purchases greater than $3,500 – SharePoint form PO request process	In Workday, you create a purchase requisition and that will initiate the process for a purchase order to be created.	FIN102-17 Create Purchase Requisition: Request for Quote Process
JVs to transfer internal funds from one account into another	A request is submitted outside of Workday through a SharePoint site. A financial specialist will enter the information info Workday and route it for approvals.	Journal Voucher Request Site *Live Nov 2*
Create an invoice through the Invoice Request excel form and emailing to Accounts Receivable	Only users with the Department Billing Requestor security role have access to Create Customer Invoice in Workday. Once the request has been submitted, it routes to Accounts Receivable to review and send an invoice to the customer. If you need access and don't have it, please contact Bethany.saunders@ubc.ca	FIN107-07 Customer Invoice: Create Customer Invoice
Professional development expenses through paper claims process	In Workday's search bar, type "Create Expense Report" or use the expense icon on the homepage.	FIN101-06 Expense Reporting: Create Expense Report – Professional Development (PD Fund)
Personal information updates, viewing benefits and compensation history, accessing T4 via Self-Service Portal	In Workday, employees can now update personal information, make changes to benefits, and access employment records.	Onboarding Benefits
Staff absences in PAT or excel tracker	In Workday, vacation, medical leave, and sick leave will be requested by the employee and the manager is notified via Outlook to log into Workday and approve it. Managers can also enter their staff's absences.	HR110-01 Absence: Request Time Off Managing Team Absences Demo Video
Approving hourly employees hours on a paper form	In Workday, employees enter their hours and managers will get a notification via Outlook to log into Workday and approve it.	HR111-05 Time Tracking: Time Entry Approval

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		HR111-02 Time Tracking: Enter Time (Hourly Staff) HR111-03 Time Tracking: Managers Entering Time
Reports via FMS nQuery or HRMS Reports	In Workday, type in the name of the report in the search bar. There is also a grants dashboard.	List of Common Reports in Workday HR114-01 Reporting: Reporting Basics HR114-02 Reporting: Advanced Reporting FIN103-04 Research Grants Dashboard: Generate and View Forms
Employee onboarding (tax forms, workplace learning, offer letter) via email and paper	For staff and students, the agreement (offer letter and reappointment) will be generated in Workday and the employee needs to login and accept the terms and conditions in Workday. General onboarding such as required UBC courses and the completion of tax forms will be done in Workday. For faculty, including research associates and fellows offer letters will continue to be done outside of Workday and the agreement will be uploaded to Workday by HR.	HR112-02 Workplace Learning: Required UBC courses HR106-06 Provincial Tax Elections HR106-07 Federal Tax Elections HR107-03 Benefits: Enroll in Benefits and Pension (New Hire)

INTEGRATED RENEWAL PROGRAM

Hypercare Office Hours, Training and Events Calendar

OCTOBER 2020

OCM SUPPORT AFTER GO-LIVE SUMMARY

Support after Go-live (Hypercare Support) refers to support provided by the IRP and ISC teams to the UBC community post go-live (target November 2020 – January 2021).

	Finance Hypercare Support	HCM Hypercare Support	Cross-Functional (FIN & HCM) Hypercare Support	Learning Rover Office Hours
Description	Finance Hypercare support will be offered via training sessions and call-in events	HCM Hypercare support will be offered via HCM Office Hours (for HR Partners/Analysts), Time Tracking Support Sessions and 'other' training sessions	Cross-functional Hypercare support will be offered via training sessions and UBCO Workday Wednesdays (open to UBCO only).	Learning Rover Office Hours will be offered throughout November. Open Office Hours provide a forum for users to come in to ask questions and get guidance on basic Workday tasks
Topics	**Training and call-in event topics include:** • Simple/complex expense reports • Cash sales • Purchasing • Finance reporting • Customer accounts	**HCM Office Hours (for HR Administrators) topics include:** • Workday HCM Tips and Tricks • Create Position, Direct Hire & Add Job • Change Job (all reasons) • Recruitment • End Job & Termination • Open Q&A **Time Tracking Office Hours (For Payroll Stakeholders)** are open Q&A sessions for Time Tracking specific questions. Example topics for Q&A and/or discussion include: • Timekeeper security role overview • Cutoff dates/time for time tracking approvals • Missed time entry / correcting time entry **'Other' Training Session topics include:** • Time tracking • Dedupe tool usage	**Training and call-in event topics include:** • Workday for Faculty • UBCO Workday Wednesday	**Learning Rover Office Hour topics include:** • Setting up notifications / delegations • Other Workday Basics Topics • HR Basic Topics • Finance Basic Topics ***Note**: In addition to Office Hours, Rovers will also be supporting faculties/units locally as planned with the Transition Network and Community Engagement Partners (CEPs)*

Note: The IRP and ISC teams will assess the need for additional sessions post go-live.

Finance | HCM | Cross-Functional | Learning Rover Office Hours

HYPERCARE SCHEDULE: WEEK OF NOVEMBER 2

See the appendix for more information about each session.

Support Available	**Monday 02 – Workday is Live!**	**Tuesday 03**	**Wednesday 04**	**Thursday 05**	**Friday 06**
Learning Rover Office Hours *(click **here** for additional details)*	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**
HCM Office Hours | Training Sessions | Time Tracking Support Sessions *(click **here** for additional details)*	**9-11am (HCM Office Hours) Topic: Workday HCM Tips and Tricks** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours) Topic: Create Position, Direct Hire & Add Job** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours) Topic: Change Job (All Reasons)** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **9-10am Topic: Time Tracking Webinar**	**9-11am (HCM Office Hours) Topic: Recruitment** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours) Topic: End Job & Termination** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A)**
UBCO Workday Wednesdays *(click **here** for additional details)*			**11am-12pm** *(click **here** for additional details and to register)*		

Finance | HCM | Cross-Functional | Learning Rover Office Hours

HYPERCARE SCHEDULE: WEEK OF NOVEMBER 9

See the appendix for more information about each session.

Support Available	Monday 09	Tuesday 10	Wednesday 11	Thursday 12	Friday 13
Learning Rover Office Hours *(click **here** for additional details)*	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**Stat Holiday: Remembrance Day**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**	**9:30-10:30am Topics: Notifications & Delegations** **1-2pm Topics: Other WD Basics Topics for staff / managers**
HCM Office Hours | Training Sessions | Time Tracking Support Sessions *(click **here** for additional details)*	**9-11am (HCM Office Hours) Topic: Workday HCM Tips and Tricks** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours) Topic: Create Position, Direct Hire & Add Job** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours Q&A))**		**9-11am (HCM Office Hours) Topic: Recruitment** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A))**	**9-11am (HCM Office Hours) Topic: End Job & Termination** **1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In** **10am-12pm Time Tracking Office Hours (Q&A)**
UBCO Workday Wednesdays *(click **here** for additional details)*				**11am-12pm** *(click **here** for additional details and to register)*	
FIN Training/Call-In Event *(click **here** for additional details)*	**1-2pm Training: Finance 101 Simple & Complex Expense Reports**			**10:30am-12pm Training: Finance 301**	

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SCHEDULE: WEEK OF NOVEMBER 16

See the appendix for more information about each session.

Support Available	Monday 16	Tuesday 17	Wednesday 18	Thursday 19	Friday 20
Learning Rover Office Hours *(click **here** for additional details)*		**9:30-10:30am** **Topics: Notifications & Delegations, WD Basics for staff / managers** **1-2pm** **Topics: HR Basics**		**9:30-10:30am** **Topics: Notifications & Delegations, WD Basics for staff / managers** **1-2pm** **Topics: Finance Basics**	
HCM Office Hours | Training Sessions | Time Tracking Support Sessions *(click **here** for additional details)*	**9-11am (HCM Office Hours)** **Topic: Workday HCM Tips and Tricks** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **1-2pm** **Training: DeDupe Tool Training** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: Create Position, Direct Hire & Add Job** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: Change Job (All Reasons)** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: Recruitment** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: End Job & Termination** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**
UBCO Workday Wednesdays *(click **here** for additional details)*			**11am-12pm** *(click **here** for additional details and to register)*		
FIN Training/Call-In Event *(click **here** for additional details)*			**1-2pm** **Training: Finance 201 Cash Sale** **Finance Call-In Event: Reporting** *(registration link to be provided at a future date)*		

Finance | HCM | Cross-Functional | Learning Rover Office Hours

HYPERCARE SCHEDULE: WEEK OF NOVEMBER 23

See the appendix for more information about each session.

Support Available	Monday 23	Tuesday 24	Wednesday 25	Thursday 26	Friday 27
Learning Rover Office Hours *(click **here** for additional details)*		**9:30-10:30am** **Topics: Notifications & Delegations, WD Basics for staff / managers** **1-2pm** **Topics: Finance Basics**		**9:30-10:30am** **Topics: Notifications & Delegations, WD Basics for staff / managers** **1-2pm** **Topics: HR Basics**	
HCM Office Hours | Training Sessions | Time Tracking Support Sessions *(click **here** for additional details)*	**9-11am (HCM Office Hours)** **Topic: Workday HCM Tips and Tricks** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: Create Position, Direct Hire & Add Job** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: Change Job (All Reasons)** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: Recruitment** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**	**9-11am (HCM Office Hours)** **Topic: End Job & Termination** **1-3pm (HCM Office Hours)** **Topic: HCM Office Hours - Drop In** **10-11am** **Time Tracking Office Hours (Q&A)**
UBCO Workday Wednesdays | Training Sessions *(click **here** for additional details)*			**11-12pm UBCO Workday Wednesdays** *(click **here** for additional details and to register)* **1-1:30pm** **Training: Workday For Faculty**		

APPENDIX

Finance | HCM | Cross-Functional | Learning Rover Office Hours

HYPERCARE SCHEDULE: DECEMBER

See the appendix for more information about each session.

Monday	Tuesday	Wednesday	Thursday	Friday
30 9-11am (HCM Office Hours) Topic: Workday HCM Tips and Tricks 1-3pm (HCM Office Hours) Topic: HCM Office Hours - Drop In 1-2pm Training: Customer Accounts Q&A	1	2 11-12pm UBCO Workday Wednesdays	3	4
7 1-2pm Training: Finance 101 Simple & Complex Expense Reports	8	9 11-12pm UBCO Workday Wednesdays 1-1:30pm Training: Workday For Faculty	10	11
14 10:30-12pm Training: Finance 301	15	16 11-12pm UBCO Workday Wednesdays	17	18
21 “Holiday Shutdown” – no training / events offered at this time	22	23	24	25
28	29	30	31	1

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SCHEDULE: JANUARY

See the appendix for more information about each session.

Monday	Tuesday	Wednesday	Thursday	Friday
4	5	6 11-12pm UBCO Workday Wednesdays	7	8
11	12	13 11-12pm UBCO Workday Wednesdays	14	15
18	19	20 11-12pm UBCO Workday Wednesdays	21	22
25	26	27 11-12pm UBCO Workday Wednesdays	28	29

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (LEARNING ROVER OFFICE HOURS)

Session / Event Name	Description	Topics we can support you on	Date	Duration (Hrs)	Intended Audience
Learning Rover Office Hours	Learning Rover Office Hours will be offered throughout November to support the UBC community. These Office Hours will be hosted centrally by the IRP Training Team and will provide a forum for users to come in to ask questions and get guidance on basic Workday tasks such as: setting up notifications/delegations. • Nov 2 – 13th [9:30-10:30am] • Nov 2 – 13th [1-2pm] • Nov 17, 19, 24, and 26th [9:30-10:30am] • Nov 17 and 26th [1-2pm] • Nov 19 and 24th [1-2pm] ***Note**: In addition to Office Hours, Rovers will also be supporting faculties/units locally as planned with the Transition Network and Community Engagement Partners (CEPs)*	Nov 2 – 13th [9:30-10:30am]: Topics include support with delegations and notifications Nov 2 – 13th [1-2pm]: Topics include support with other WD Basics. WD Basics topics include: Inbox filter & sorting, Quick access, Org chart navigation, Related actions, Search function, Approval options & Bulk approval, and Workday Mobile setup Nov 17, 19, 24, and 26th [9:30-10:30am]: Topics include support with delegations, notifications, and Workday Basics Nov 17 and 26th [1-2pm]: Topics include HR Basics. HR Basics include: Personal Information change, View Payslips, Request Time Off, Time Entry, Benefits Enrollment, Team Management, Team Absence navigation, and Team Time navigation Nov 19 and 24th [1-2pm]: Topics include Finance Basics. Finance Basics include: Create Expense Report (out of pocket, visa reconciliation, PD fund), Quick expense with Mobile App, Expense delegation, Submit Purchase Requisition (Catalogue & Non Catalogue, submit change order), and Request Internal Service Provider	Nov 2 – 26 (see description for details on dates/times)	• Nov 2 – 13th: 2 hrs / day (AM & PM option) • Nov 16- 27th: 2 hrs / 2 days a week (Tuesdays and Thursdays)	ALL

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (HR/HCM)

Session / Event Name	Description	Topics we can support you on	Date	Duration (Hrs)	Intended Audience
HCM Office Hours (for HR Administrators)	HCM SMEs will hold daily virtual Office Hours to provide support on HCM business processes the HR community is entering to meet the November and December payroll deadlines. The audience for these Office Hours are those who have completed the HR Partner/Analyst End User Training for Initiators. These will not be training sessions, so users should continue working with their department's trainers and CEPs for training support. For November, Office Hours will be held twice daily, from 9:00-11:00 AM and 1:00-3:00 PM. Mornings will focus on specific topics, and afternoons will be open for general questions, with 1:1 support in breakout rooms available at all sessions.	Morning session topics: • Monday: Workday HCM Tips and Tricks • Tuesday: Create Position, Direct Hire & Add Job • Wednesday: Change Job (all reasons) • Thursday: Recruitment • Friday: End Job & Termination Afternoon session: Open Q&A	Nov 2 – 30	• Morning: 2 hrs • Afternoon: 2hrs	HR Administrators (HR Partners, HR Analysts)

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (HR/HCM)

Session / Event Name	Description	Agenda	Date	Duration (Hrs)	Intended Audience
Time Tracking Office Hours	Time Tracking SME will hold daily drop-in Q&A session for the community solve time-tracking related questions.	Open Q&A on Time-tracking related questions. Example topics for Q&A and/or discussion include: • Timekeeper security role overview • Cutoff dates/time for time tracking approvals • Missed time entry / correcting time entry	Nov 2 – 27	• Nov 2, 3, 5, 6, 9,10, 12,13: 2 hrs / day • Nov 16- 27th: 1 hrs / day	Timekeepers, Managers, HR Analysts, Hourly Staff
Time Tracking (HR Training)	This webinar is for hourly staff, managers, timekeepers and HR Analysts to refresh their memory on fundamental knowledge of time tracking, learn about most commonly asked questions and prepare for the first payroll cutoff after go-live.	• Provide an overview Timekeeper Security Role, Time Tracking BP overview • Discuss cutoffs for time tracking approvals and different ways to approve time (e.g., individual approval vs bulk approval) • Different reminder for time entry/approval • What to do if there is missed time entry or missed approval; correcting time entry • Overtime & Flex time • Open Q&A (30min)	Nov 4 [9-10am]	1	Timekeepers, Managers, HR Analysts, Hourly Staff

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (HR/HCM)

Session / Event Name	Description	Agenda	Date	Duration (Hrs)	Intended Audience
Dedupe Tool (HR Training)	This webinar is for HR Professionals (HR Partners, HR Analysts, Sr HR Partner, Sr FR Partner, and Managers) who initiate the "Hire" process in Workday. Using the DeDupe Tool is a mandatory step needed to complete hire business processes.	• Dedupe tool concept overview • Dedupe tool usage • Video demo • Q&A	Nov 16 [1-2pm]	1	HR Professionals (HR Partners, HR Analysts, Sr HR Partner, Sr FR Partner, and Managers) who initiate the "Hire" process in Workday

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (CROSS-FUNCTIONAL)

Session / Event Name	Description	Agenda	Date	Duration (Hrs)	Intended Audience
Workday for Faculty Cross-Functional Training	This webinar is for faculty who want to receive a quick overview of relevant actions they can initiate in Workday, including delegations, expensing to a grant, and more	• Basic Navigation • Basic Employee Tasks • Delegation • Quick Expense & Expense Reporting	Nov 25 [1-1:30pm] & Dec 9 [1-1:30pm]	0.5	Faculty
UBCO Workday Wednesday	Weekly session offered for all UBCO employees to help address any Workday questions/requests and provide additional Workday information. ***Please contact Lauren Hatchard if you are interested in attending these sessions: lauren.hatchard@ubc.ca***	Can vary by week	Nov 4 – Jan 27 [11am-12pm] – Weekly	1	ALL UBCO Employees

Finance | HCM | Cross-Functional | Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (FIN)

Session / Event Name	Description	Agenda	Date	Duration (Hrs)	Intended Audience
Finance 101: Simple & Complex Expense Reports	This webinar is for UBC Faculty, Staff and Student Employees who want to learn about Finance key concepts including Workday's Foundation Data Model and terms such as Worktags and Cost Centres. In this course we will cover simple and complex Travel and Expense Management, including how to claim out-of-pocket expenses, Expense to PD Funds, delegating expense reports, credit card reconciliation, foreign currencies, international travel, per diems, and more.	• Creating Expenses • Quick Expenses on Mobile, • Delegating expense reports, • Credit card reconciliation, foreign currencies, international travel, per diems, and more.	Nov 9 [1-2pm] & Dec 7 [1-2pm]	1	ALL
Finance 201: Cash Sale	Webinar targeting faculty and staff who will receive an overview of Internal Service Delivery, Cash Sales, and Deposits.	• Internal Service Providers • Cash Sale • Deposits	Nov 18 [1-2pm]	1	Faculty and Staff
Finance 301	This webinar is for UBC Faculty, Staff and Student Employees who want to learn about advanced Supplier Accounts topics including submitting purchase requisitions, purchase orders, change orders, requesting a supplier setup, invoice coding and reviewing and more.	• Submitting Purchase Requisitions, PO's, Change Orders, Supplier Setup, invoicing and coding, receiving.	Nov 12 [10:30-112pm] & Dec 14 [10:30-12pm]	1.5	ALL

Finance HCM Cross-Functional Learning Rover Office Hours

HYPERCARE SUPPORT DETAILS (FIN)

Session / Event Name	Description	Agenda	Date	Duration (Hrs)	Intended Audience
Customer Accounts Q&A	This webinar is for Customer Contract Specialists, Customer Billing Specialists, Customer Payment Specialists, and Customer Deposit Specialists within: FoM, Energy Water Services / Building Operations and Treasury. This Q&A session will be an opportunity for end users to discuss any outstanding questions they have with the Customer Accounts Functional SMEs.	• Open Q&A on Customer Accounts	Nov 30 [1-2pm]	1	Customer Contract Specialists, Customer Billing Specialists, Customer Payment Specialists, and Customer Deposit Specialists within: FoM, Energy Water Services / Building Operations and Treasury
Finance Call-In Event: Finance Reporting	Call-in event intended to showcase finance reports	• TBC	TBC	TBC	TBC