TRIUMF Workday – Frequently Asked Questions

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Workday Basics

What is Workday?

Workday is a cloud-based application that will replace our legacy HR and Finance systems. Used by academic institutions and commercial organizations alike, Workday provides a solution that modernizes our approach to key business processes at the lab. With greater data insights, a shift to automated workflows over multi-step, manual processes, and an intuitive, end-user focused design, Workday allows us to work more efficiently in support of our science, and our mission to serve as Canada's particle accelerator centre.

How does this affect me?

Workday will introduce new technology and processes at TRIUMF. It consolidates our HR system and Agresso into a single platform – you'll soon be able to request vacation time, view organizational structures, obtain financial data on your grant, and create requisitions all within a single system.

Workday streamlines and simplifies the tools at your disposal, and its emphasis on automation empowers more self-service for your HR and Finance needs.

There will be some new skills and terminology to learn as we launch Workday, but we are committed to providing you with the resources and training you need to get comfortable in advance of go-live.

When does implementation start?

Workday implementation is underway. Our target go-live date is October 7, 2021.

Are we going to get training?

Yes! Training materials will be made available on September 20, via our existing Learning Management System (learning.triumf.ca).

Training will be provided in the following formats:

- Job Aides: written, searchable documentation with illustrations to help explain processes
- How-To Videos: step-by-step videos showing you how to complete tasks and processes in Workday
- Q&A Sessions: meetings with SMEs to as questions about key business processes

Are we doing anything to make sure TRIUMF is ready for this change?

We know this is going to be a big change for the lab, so we've been taking measured steps to make this change as smooth as possible. In the months leading up to go-live, we'll be providing regular updates via Town Halls, site-wides, and other communications channels in order to keep you informed of the project and its progress. Our project team has been keeping track of your questions and comments to date, and we are taking them into consideration as we prepare for launch.

We're also working to ensure that you have the skills and knowledge you need to navigate and use Workday when it goes live. Training resources will be published September 20 and support will be made available closer to go-live.

How will the program be managed?

The Workday ERP implementation is being governed by TSOP-15, TRIUMF's project governance system, and will follow all of the necessary steps to ensure compliance. In addition, there will be a project manager dedicated to the implementation.

We are working with Deloitte to deliver Workday. Deloitte has experience in delivering Workday Launch projects and is providing us with support and resources to help us meet our go-live date.

I have questions – who do I contact?

Have a question or an issue after go-live?

1. Review the Self-Serve options available:
    - On-demand Workday Training Materials
    - Review your Go-Live Kit
    - Attend and/or review a topic-specific live Q&A session with a SME

2. Still can't find what you need? Is something not working?
    - Contact the Helpdesk
    - Submit a ticket to the Helpdesk and your request will be routed and escalated as appropriate
    - When creating a ticket:
        - Be specific and detailed
        - Include screenshots where possible

How can I provide feedback on Workday?

Thank you for offering your insights! If you have specific concerns or needs/use cases you'd like considered, please contact Joanna Carson or Ian Doyle. If you have specific questions about how we're communicating about the project, please contact Carla Rodrigo.

IS&T Questions

Do we use TRIDENT to access Workday?

Yes, TRIDENT will be used to login to Workday.

Are we allowed to have a custom password to Workday?

No – we will be using TRIDENT to authenticate users on Workday.

I understand Workday is not replacing the Visitor App at go-live. Are there plans to integrate the two systems after go-live?

The Visitor App will remain in use following Workday go-live. Visitors will need to be assigned to a facility in the Visitor App – this ensures that they are being identified and organized in Workday according to location and provides them the necessary training for that location. Visitors will use their TRIDENT credentials, which they can then use to access their training in Workday.

Post go-live, we can review the requirements for visitors and develop a plan of action for future integrations.

How will visitors access training after the September 20th hold period?

The last day that visitors can be invited onsite through the MIS Visitor App will be 17:00 PST on Monday, September 20th. All visitor approvals must be completed by 17:00 PST on Tuesday, September 21st.

If visitor requests are not approved by the September 21st cut-off, visitors will not be able to access training or other TRIUMF services that require TRIDENT login authentication until October 7th.

After go-live, will all visitors receive a TRIDENT account so that they can access training in Workday?

All visitors receive a TRIDENT account through the Visitor App, which will allow them to access training in Workday.

Will visitor training certifications be carried over to Workday Learning?

Yes, any visitors that have completed training certifications prior to the September 20th hold period will have their information carried over to Workday.

Is Workday interacting with work permit and work request systems?

The existing Work Permit system has no integration with Workday; however, this may be something to investigate in future. The Work Request system will see some changes to its user interface in order to reflect some changes in Workday, mainly the lack of subaccounts.

Finance and Supply Chain Questions

Will I see my existing account number in Workday?

Yes – we are trying to maintain the same account numbers in Workday, however term “account” will be replaced with “Program, Project, or Grant”. For example:

- In Agresso: Account 1023
- In Workday: PRG_1023

Will Operational Commitments remain the same as now?

All active legacy operation commitments will be moved to Workday using the same code (e.g. ATG Operations will remain O_45 in Workday). In some cases, certain operational commitments have been split into separate commitments, in order to provide more specificity when reporting on our activities.

If a new Operational Commitment is needed, the Director, Project Management, will need to create it.

When we track the FTE working on projects in Workday, will we be able to get the according dollar value we spend on project funds for these resources?

Yes – in the projects module you can see the labour value cost.

Can a multi-PI experiment budget (e.g., Darklight experiment with $1M budget) be split amongst multiple PIs to disperse approval authority?

We will not be looking to configure an additional Account Holder for this launch but can revisit for a later release.

After the budget has been split, can funds be moved from one subaccount to another (transferred from PI to PI)?

Because subaccounts will no longer exist, there is no need to transfer funds because they all exist in one account. To assign funds to specific expenses we use spend categories or project tasks to allow for financial tracking and analysis.

How will account/subaccount structures accommodate the matrix-style approach to projects with rotating personnel? Will some individuals have control over multiple subaccounts to make purchases?

Since subaccounts will not exist, there won't be a need for someone to manage multiple subaccounts. Individuals who work across multiple projects will submit stores orders, purchase requests and expense reports to the program, project or grant they are working on.

The end user selects the spend category or project task for that item so that the appropriate financial tracking and analysis can occur.

In Workday, the correct approvals for those working across multiple projects will automatically route to the appropriate Program, Project, or Grant manager (account holder).

Can subaccounts for small amounts of money (e.g., $1000) be created to be managed/approved by highly qualified personnel (i.e., students, post-docs, technicians, etc.)?

No, subaccounts won't exist

When any worker submits a Stores order for more than $200 or a purchase request for any value, it will be tagged to a spend category or project task and automatically routed for approval to the appropriate approver.

How do I make emergency purchases during the hold period beginning September 13?

In the event that a purchase is deemed critical to a project, please follow the steps below. Note that clarity must be given regarding the deadline for the purchase or payment for it to be considered an emergency.

1. Email the accountholder for approval, with kaimei@triumf.ca and nan@triumf.ca cc'd, and include:

   - ✓ **Account number**
   - ✓ **Sub account**
   - ✓ **Description/name of the item**

2. Requests must be approved by ALD/DD (Deputy ALD or CFO in ALD/DD absence).
3. Once approved, send your request and ALD/DD approval to kaimei@triumf.ca and nan@triumf.ca marked "urgent".

You will be notified when your purchase is complete.

How do I order from the Stores during the hold period beginning September 13?

To order items from Stores during the hold period, please visit the online catalogue to select items you need: https://www.triumf.ca/logistics/stores-catalogue

You can:

1. Search by product category, OR
2. Search the entire catalogue

Once you've chosen your items, select one of the following options to complete your order:

Option 1: Email your order to Stores, attach your fillable Order Form.

Option 2: Visit the Stores and fill out a hardcopy order form.

Can I still make purchases via standing order during the hold periods beginning September 13?

Purchases can continue to be made via existing standing orders, which will be called Blanket Purchase Orders in Workday.

The process remains the same - you can contact the supplier directly via phone or email and place an order with reference to the standing order number; no need to order through Procurement during this time.

During the 3-week hold period for the Workday transition, the Machine Shop will likely need to order special materials for work orders. In this case, do we create purchase requests with the old carbon forms and then submit to procurement?

During the hold period, any purchasing should follow the above steps for emergency purchases.

Will Agresso history of purchases be accessible in Workday?

Only the open PO's will be brought over to Workday. However, we will still keep Agresso as a database for history.

Is there an alternative mechanism for delegating approvals if the Account Holder goes on holiday or is away at a conference and forgets to assign a deputy?

Reminders to Program, Project and Grant Managers will be included in our post go-live communications to help with the transition to new ways of working.

In unforeseen circumstances, such as sudden illness or leave of absence, end users can contact Finance for support.

What mechanisms are in place to reduce the administrative load placed on Program, Project and Grant Managers (Account Holders) since individuals will no longer be able to self-authorize purchases?

1. **Blanket Purchase Orders** (or standing order) can be set up for items that are required on a regular basis.

A blanket PO or standing order is a purchase order that outlines an ongoing agreement arranged between an organization and a vendor to deliver goods or services at a predetermined price and on a recurring basis for a specified time period.

A blanket PO can help take care of low value regular purchases (e.g., screws, resistors etc.) to lighten the administrative load on the approver.

2. **Bulk approvals** of purchase requests as well as time sheets and expense reports allow approvers the ability to approve multiple items with two clicks.

How will a single approver know whether to approve a technician's purchase in some subsection of the project that is under a different PI?

The technician should provide as much detail and information to the purchase requisition as possible to help the approval process.

The Program, Project, or Grant (PPG) manager (account holder), at their discretion, can decide to add an additional approver if further scrutiny is required to feel comfortable with the approval, however, adding an approver does not remove the approval accountability from the PPG Manager and is not encouraged as it has the potential to slow down approvals and create bottlenecks.

Will there be a process other than email to get such approval?

Program, Project, or Grant managers should communicate with other PIs within Workday by tagging them in comments. For continuity purposes, any comments made within Workday are recorded. Emails outside of Workday are discouraged.

What are the thresholds for ordering and/or purchasing low value items?

Inventory orders for Catalog items (stores items) under $200 will be automatically approved. All other inventory orders or purchase requisitions will be automatically routed to the appropriate approver.

Who is authorized to make low-value orders? How is authority assigned?

All end users are authorized to place Inventory (Stores) orders under $200 and can submit any value purchase requisition but approval by the appropriate Program, Project, or Grant manager and/or Cost Center Manager will be required.

Can technicians/students have different ordering authority depending on the account (i.e., ATLAS vs. UCN etc.)?

No.

What controls are in place to catch ordering mistakes (e.g., ordering 1000 bags of M8 screws when intent was to order one bag of 1000 M8 screws, typo for 11 computers when intended to order 1 etc.)?

End users must take accountability to review the order information prior to the submission. The Buyer does not have the knowledge of the quantity and spec requirement; the Program, Project or Grant manager may be able catch the error if they are aware of the purchase.

If the purchase requisition is in the approval stage, the end user must contact the Buyer to adjust the order requirement.

If a request exceeds the budget, the existing NSF process applies, and Francis or Chloe may provide approval.

Will I be able to buy something without pre-approval and get reimbursed?

We are highly encouraging the use of spend authorizations prior to an expense – this ensures visibility and that the expense is charged against an account. However, we understand that in some urgent cases, it may not be possible to get a spend authorization in time. In that case, you can submit an expense report after the fact, but we still encourage the use of spend authorizations.

You can create expense reports without a spend authorization, and a notification will be sent to your manager.

What are Expense Reports?

Expense Reports will replace Requests for Reimbursement and require both a supervisor approval and Program, Project, or Grant manager approval (as applicable).

Reimbursements will continue to be paid weekly on Wednesdays and the status of your expense report can be tracked with “My Expense Reports” and viewing the business process log on the item.

How will Account Holders sign off on their own expenses (e.g., travel and/or credit card purchases)?

Program, Project, or Grant managers will approve their own spend, and their supervisor will also be needed to approve the expense.

How will credit card purchases and reimbursement be managed?

Expenses incurred on an employee's personal card will require the submission of an Expense Report and will be reimbursed by EFT.

How will Travel Expenses be managed?

Travel expenses will require spend authorizations to be submitted prior to incurring any travel-related expenses. Once the spend authorization is submitted and approved, the employee can proceed with booking travel. Cash advances are available on spend authorizations and will be disbursed by EFT.

Once travel expenses have been incurred, an expense report must be submitted. If the expense is less than or equal to the spend authorization on the same Program, Project or Grant and spend categories, then no further approval will be needed. It will still be screened by expense partners (finance staff) to assign proper taxes and validate expenses. Accounts payable will then reimburse the employee for travel expenses claimed.

Human Resources Questions

Are managers the same as a group leader?

In Workday, a manager is anyone who has a direct report.

Is compensation in TRIUMF's tenant linked to our account in the UBC tenant?

No, they are not linked together. The only relationship that TRIUMF pay has with the UBC tenant is for payroll purposes only.

In the UBC tenant you will see payslips, bonus and one-time payment history, and tax documents. You will also see your employee health benefit premiums and deductions.

In TRIUMF Workday you will be able to see your current compensation, merit or bonus, and performance rating.

The HR and Finance processes for sending and receiving information from UBC for payroll purposes are being streamlined and made more efficient so these teams have more time to spend on other areas.

Will the P3 process be dropped or modified for Workday?

P3 will be completed within Workday (forms, etc. filled out in WD). Further information about transferring during this performance year is forthcoming.

Will all hiring be done by TRIUMF staff or will outside consultants still be able to be used?

Hiring will be done by TRIUMF staff inside Workday. In the event that an external firm is being used, Workday will still be primarily used except for any outside of system requirements.

Will the organization's goals and initiatives be visible in Workday?

Yes, organization goals and initiatives will be loaded and visible in Workday.

Will my Department Head be able to see my salary?

Those who are upwards in the supervisory relationship and have the appropriate security role can see details such as salary for those in their downline. This visibility is the same as in our current system.

How often do we need to record our hours?

Employees must record hours, at minimum, on a weekly basis using either the Worklet within Workday or their mobile phone (optional); you are encouraged to record daily for accuracy.

To make time entry easier, employees can choose Auto-fill from prior weeks or Set Default Projects so that the Time Type is selected once.

How often do we need to submit our hours for approval?

In Workday, we will continue to be paid semi-monthly, so time sheets must be submitted as per the pay period cut-offs (twice per month).

What if I am on vacation and I cannot approve the time sheet in time?

If you are away, you will be able to delegate certain responsibilities to others to ensure that approvals continue in your absence.

We have 4 hours per month for medical appointments. Does that need to be tracked in Workday?

Yes, medical appointments will be an Absence type in Workday.

You mentioned overtime work must be preapproved – what about break fixes or call-ins?

We understand that emergencies do happen, and it can be all hands-on deck to get things fixed. As much as possible, we want to encourage pre-approval of overtime, knowing that in some cases it will need to be approved after the fact.

How will the retirees and alumni needs be considered in the framework of Workday?

There are no immediate plans to add TARA members into Workday. Any access requirements will continue to be administered through the visitor system.

Post-Retirement and Emeritus will be administered through Workday.