Answers to questions from chat log/live questions during Sept 23/22 session

(for any inconsistencies between answers given verbally during live presentation and the information below, please note that the information provided below takes precedence)

- Regarding the Form 300, what's the best practice for returning the Form 300s? Send it through Dept office or send directly to Research Finance?

A: Either method works - if you're concerned about Dept office keeping track, then you can send to research.statements@finance.ubc.ca and cc the Dept office, hitting both offices at once.

- Please share with us how to generate a delegation summary report - Workday delegation tasks. Is there a way to generate a report from Workday to give a list of names and if they have signing authority/which worktags they have signing authority on?

A: There's a report called "Delegation History", but it only shows delegation for particular user; to see a specific business process' delegation, there is also the inbox item "my delegations" to view who is being delegated to a specific process or task; to view a specific item in terms of who approved a specific transaction, you can look at the "process" link; to view signing authority for specific worktags, you can pull the report "FDM Grants" to view signing authorities particular to specific worktags.

- For CFI procurement, sometimes there's excess consumption or less consumption of funding in the grant - what's the best way to address this? Charge to startup fund?

A: It's probably best to speak with the Research Finance Officer assigned to the GR worktag for the CFI, as they will be responsible for doing financial reporting and monitoring of the GR's financial activities and can provide you with some suggested approaches best suited to the situation at hand.