Meeting Q&A follow up sent on behalf of MRAM

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Q&A from our session are included here for reference and will be available with the other meeting materials shortly.   Within a week or so following every MRAM, an email like this one typically goes out with Q&A from the session and a link to the meeting materials.    **Jump to section on:**   * [PAFC Hot Topic: Cost Share in Workday](#a1) * [SAGE Updates & Tips](#a2) * [Award & Modification Requests - Tips for Comments & Budgets](#a3) * [GCA Update](#a4) * [Workday Grant Budget to Actual Report](#5) |  |  | | --- | |  |  |  | | --- | | **PAFC Hot Topic: Cost Share in Workday** |  |  | | --- | | **Q1**: Is there a job aid for adding cost share award line Worktags to employee costing allocation yet?  **A1**: There is not a job aid at this time but they have been requested.   **Q2**: Will we still be able to do cost share shifts in ECC for faculty effort?  **A2**: Yes, ECC has the shift in effort functionality built into the system.   **Q3**: What is the cost share award line Worktag? How is it different than the Gift budget Worktag?  **A3**: The Grant ID for the cost share award line, which will begin with "GR" followed by six digits, is the Worktag for the cost share award line.   **Q4**: Is cost share award line auto-created for awards that had cost share well underway before 7/1?  **A4**: Yes, we automatically created award lines for cost share commitments existing before go-live.   **Q5**: What are some examples of non-salary cost sharing?  **A5**: Non-salary costs that may be used as cost sharing could be supplies, equipment purchases, or travel costs. As with all cost share, only costs which are allowable may be used to meet cost share commitments. |  |  | | --- | | **Resource Link:**   * [Cost Share | Grant & Contract Accounting](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy-ruz7MkRrK1bxf1XcSMwfEr-yrvE_wGAYjB2AdBfJ45N5c9F6ZF3jhnYMRA419GsAc=) |  |  | | --- | |  |  |  | | --- | | **SAGE Updates & Tips** |  |  | | --- | | **Q1**: Will the Workday Award Number search for subaward requests run into the same issue as MOD requests where new AWD numbers need to be manually added?  **A1**: ORIS will be doing a data update at time of release to populate all existing awards in SAGE. This will support both modification and subaward search needs in the immediate term. Coming with the 11/30 release will be the real-time syncing of awards to SAGE as ASRs are processed. Between releases, if you have a new award you need to immediately modify and you don't see your award available for selection, please contact [sagehelp@uw.edu](mailto:sagehelp@uw.edu) and we will add it for you.   **Q2**: What about year 2 subaward setup/modifications?   **A2**: For new subaward modifications, at time of creation the Workday award number will auto-fill for you. You will complete the rest of the modification questions as you do now, and submit.   **Q3**: If we have subawards for a new award in composing status, are we going to have to redo the subaward affiliated with a new award after the update?  I have one currently in composing status because of the FA issue.  **A3**: For subawards in composing status at time of go live, you will see a "Lookup Award" button, where you can search for your Workday award number, select the award, and move the existing item forward in the submission process. You should not have to start over on any existing request.   **Q4**: Do we need to have a subaward award line (GRxxxxxx) in place for the subaward BEFORE we submit the subaward request?  **A4**: Yes, OSP will want to see an award line setup in Workday prior to issuing a subaward. If not present, then a Modification Request should be completed to add the award line and obtain any necessary approvals from the sponsor. |  |  | | --- | | **Q5**: What will happen to the subawards currently in process?  **A5**: If there is only an eGC1 selected on a subaward in composing status, users will see a "Lookup Award" button, and should select the Workday award that applies. You can then continue with the rest of the request and submit process. If an FA exists and is already selected, then the award will be defaulted and the request can progress as usual.   **Q6**: Will ASR and MOD Holds be automatically activated based on the GC1 answers? Will OSP reviewers review the ASRs and MODs that have automatic Holds placed on them?  **A6**: There are currently no rules built in for auto-applying holds. They will all need to be manually set and removed. Automatic hold rules will come in a future release. |  |  | | --- | | **Q7**: So, when we are requesting a new subaward - we need to do BOTH a GCA-only Mod and a Subaward Request in SAGE (the first to get the award line set up in WD, and the latter to get the actual PE contract written and sent to the site)?  **A7**: If you identified the subaward at time of the Award Setup Request in SAGE Budget, then the line should already exist in Workday and no modification would be needed. If you did not, then yes, an award modification is required to get the award line established in Workday. Once established, a subaward request can be created and sent to OSP for the OSP subaward team to draft the subaward agreement.   **Q8**: A lot of the new data entry info required in this form seems repetitive with the information entered in the eGC1. Is the information in the eGC1 not being loaded automatically into the subaward form?       **A8**: There is no new data entry in the subaward request form, aside from selection of the appropriate award. All available and appropriate data does default from the eGC1. It is an intentional business decision not to default start and end dates, amounts, and other details specific to the subaward. |  |  | | --- | | **Resources & Links:**   * SAGE User Guides: [Holds](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy8lVmPLS5QxXZ_0PEmbPW63Ua-wR0LnjPPhDuGYHRwZqmcPoGkThMfT8lpASWkGJo0Q=) & [Subawards](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy3zDwyfyZ06HeskRMGoq6Pf8-1WdnPqKP7HHHzdy8oNb6mlVL5PuriKSSvSBCsO-d1E=) * [SAGE Features & Prioritized Issues](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy1Gxn3mmANL62nRmMB4IKX35DfDIjQ4EEACxJ0AQRuh9hmksBAfJ8P35sTDfvtwsUjg=) * [11/09/2023 SAGE Release Notes](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy28zqyDpGIR586KnjMEclzYouNvi8fRZ4pkW7ZZdk9x4loD1J14Z19Hm8Cd_5yaBDxw=) |  |  | | --- | |  |  |  | | --- | | **Award & Modification Requests - Tips for Comments & Budgets** |  |  | | --- | | **Q1**: It would be helpful for GCA to add both the GR and AWD number in the comments when the award is set up. I have seen the GR added sometimes, sometimes only the AWD, and sometimes neither.  **A1**: Thank you for the suggestion. We will take that back to the GCA Award Setup team.   **Q2**: In order to establish award lines, must the department first revise the submitted proposal budget to match with the awarded budget before GCA can set up an award line? Or can departments set up an award line based on the proposed budget and then do rebudgeting at a later time.  **A2**: GCA is looking for the SAGE Budget worksheet to match the sponsor’s awarded amount and categories if included in the agreement (unless rebudgeting flexibility is provided by the sponsor).   **Q3**: Related to the last question (Q2): "GCA is looking for the SAGE Budget worksheet to match the sponsor’s awarded amount and categories if included in the agreement (unless rebudgeting flexibility is provided by the sponsor).” Does rebudgeting flexibility include expanded authority for UW with federal sponsors like NIH?  **A3**: Yes, expanded authority is an example of a sponsor providing the UW with rebudgeting flexibility.   **Q4**: Can the AWD set up email be sent to all the contacts on the eGC1?  **A4**: Thank you for the suggestion. We would need to assess impacts across campus units of a change like this, since many more people would be getting the emails.   **Q5**: When OSP completes an ASR "total amount", does the value reflect the total award period or budge period?  **A5**: For an ASR, the Total is for the budget period - the amount awarded in the NOA.   **Q6**: On Modifications, can we get the correct and current eGC1 associated with the MOD?  **A6**: Campus users have the ability to enter a mod-specific eGC1, if applicable. If one was entered in error and it is important to you to have it updated, we recommend submitting a request to [sagehelp@uw.edu](mailto:sagehelp@uw.edu). |  |  | | --- | | **Q7**: What extra support are GCA and OSP being given to help move through these huge backlogs? **A7: GCA’s** needs are represented in the governance groups deciding priorities and are supported by the Sustainment positions within UW Finance. GA2C is also participating in the Extended Transition Services work that is ongoing through December 31, 2023. **OSP**: In the lead up to implementation, OSP added five positions: one on Central Operations (handles [osp@uw.edu](mailto:osp@uw.edu) inbox), one position on the Proposal& Award Team, one on the Contracts Team and two on the Learning Team. With the WD Financials release and problems with the functionality and process that has created a backlog with Subawards, we are opening two new positions on the Subawards team. OSP is also shifting FTE from OSP's Contracts Team to the Subawards Team on a temporary six month basis.  **Q8**: Is there a plan for OSP to roll out an urgent request process as well? **A8**: Review the FAQ - [Urgent OSP Requests - Award Setup, Modification, and Subawards](https://www.washington.edu/research/faq/urgent-osp-asr-mod-and-subawards/)  For Awards and Modifications:   * **Indicate in SAGE if there is a Sponsor Deadline**   + When there is an actual sponsor deadline, use the "Sponsor has a deadline for accepting the award" toggle on the item in SAGE.   + Attach or include documentation from the sponsor about the deadline.   + Use Comments & History to explain any context around the urgency. * **Check SAGE regularly** to see if an item was returned to you for more information. Review the Comments & History for notes and check to see whether a HOLD was applied. * **Reach out to your OSP reviewer** directly if a sponsor deadline is approaching and you need an update or if there are new developments that impact the urgency. * **Escalate to Team Managers:**OSP is committed to ensuring you get the information you need when we are reviewing an item. If you do not receive a timely response, please escalate to Team Managers:   + OSP Proposal & Awards Team: contact both [Ari Santander](mailto:filimus@uw.edu) & [Mike Snow](mailto:mikesnow@uw.edu)   + Contracts Team: vacant, please contact OSP Director, [Carol Rhodes](mailto:carhodes@uw.edu) * [OSP Contacts and Organizational Chart](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy4qLrYKbWraMcUUqa8_6_SPPq5BoY2YIqQmBUSGLN8hGFfOO1REIHVuGAZvn7nUfmY0=) are always up to date.   **For Subawards:**  Almost all subaward requests are urgent due to the delays related to the UWFT transition, and our team is working through the backlog as quickly as possible.  We understand that there are certain situations that are uniquely urgent. These include:   * Non-US or small, domestic non-profit subrecipients that do not have the ability to operate under advance budgets * Subawards that are putting the UW at risk of not receiving payment from our prime sponsor * If you have a unique situation, please include details in the comment section of your subaward or subaward modification request. If it relates to an item already assigned to an individual, please reach out to that individual and explain the unique nature of the urgency. If you do not hear back timely, please escalate to the Subawards manager [Josy Combs](mailto:combsj3@uw.edu).   NOTE: if the reviewer of your subaward item is out, please email [ospsubs@uw.edu](mailto:ospsubs@uw.edu), include the reason for the urgency of the item and the SAGE SC number. |  |  | | --- | | **Q9**: Was the UW-wide suspension of NIH grants due to Federal delinquency covered in this meeting? **A9**: The US Department of Treasury administers the Treasury Offset Program (TOP). If an entity owes the federal government and this exceeds 90 days, that entity is placed on the TOP program list. This is then flagged in the federal System for Award Management (SAM) associated with that entity’s EIN.  UW’s EIN was added last week. This created inquiries from federal sponsors. It can impact federal awards, including halting award approvals, or making awards, until that separate and unrelated debt is resolved.  OSP worked with the Office of Research, UW’s Federal Relations Officer, and UW Medical Center to identify the debt so the unit owing the federal government resolved and the UW was removed from the TOP list, last Thursday, 11/9. At the same time, OSP has communicated with sponsors that saw the SAM.gov flag and inquired as to status. Any PI that has seen these sponsor notifications does not need to individually do anything.  This issue was not related to UWFT implementation. |  |  | | --- | | **Resources & Links:**   * [GCA Award Setup Volume](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYywPIc191JbGW7q8m6tFx8HKPd6WWPjU3gGPo4lrbH36Q-uFSKVoMO-5GE4kO9Mdti40=) * [GCA Urgent Requests](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYywBvYo3eug_lPEiKKdRKoP7e3-912P9PGM62AV4ITgJ5e0K-KHovLhq4nnUUkvU8AdM=) * [GCA Holds](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYyy88OwfkRQS_EcPV36jEoOyA3FOnk_OEsXuRM7tjsPsTctjKUA4cZ9Q14Ta57pO-N8E=) * [OSP Volume - Awards, Modifications, and Subawards](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy0v2Ac3V1jPhrgtaQ_WLFPb9sAXLwpV8igE2RYdBfSMFV-eTNXTxrq4wRqPppvZOh84=) * [OSP Urgent Requests: Award Setup, Modifications, and Subawards](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy-GjehbX5Xm1ZSYsLeP4SUJXg3TO6xNyBfOCtgb4_R5E0hTQ2_Lk9E7gsCxqrhOfnKg=) |  |  | | --- | |  |  |  | | --- | | **GCA Update** |  |  | | --- | | **Q1**: With these SAGE enhancements do you still want departments to include the SAGE Modification checklist GCA created?  **A1**: GCA still encourages departments to use their [SAGE Modification Checklist](https://finance.uw.edu/gca/sites/default/files/SAGE%20Modification%20Checklist.xlsx) to ensure that the Modification has everything it needs to be processed efficiently.   **Q2**: Why can't we just reference the SAGE Budget ID instead of taking a snapshot of the SAGE budget and attaching it to the mod request?  **A2**: GCA can’t access the SAGE Budget module so we need the SAGE Budget snapshot URL in order to access the data needed to process the request.   **Q3**: Would it be possible for GCA to gain access to the SAGE budget module?  **A3**: GCA is working with ORIS to get access but this need is being balanced with several other, very high priority requests.   **Q4**: Is there a way to find out the status of some of my older MODS and ASRs. I have roughly half a dozen sitting since July and the PIs are, understandably, growing less pleased.  **A4**: Please send the items you’re interested in to [gcahelp@uw.edu](mailto:gcahelp@uw.edu) for a status update.   **Q5**: With the backlog, would you recommend we request Advance budget or send an Urgent request to GCA? We're trying not to add more steps to the process.  **A5**: If the urgent request is an Award Setup Request (ASR) that is not yet in GCA's queue (either in OSP or with a campus unit), we recommend submitting an Advance Budget Request. If the urgent request is for a Modification Request, please submit that as an urgent request. Please visit the [GCA Urgent Requests](https://finance.uw.edu/gca/node/1720) webpage for more information.   **Q6**: Will you start updating the GCA website of how many items you are processing daily?  **A6**: Our plan is to update the homepage weekly with updates to the process backlogs. |  |  | | --- | | **Q7**: The backlog updates, is this in a positive direction of where GCA projected they would be?  **A7**: GCA is still working closely with the Integrated Service Center (ISC) to fill gaps in critical processes and continues to adjust resourcing to teams that need additional support. Progress is being made, but at a slower pace.   **Q8**: We have MODs outstanding for changing the Cost Center which was set to a default for cutover. The longer we go without getting these fixed, the more expenses we have to correct. How can we speed this up without creating additional work for GCA?  **A8**: GCA is aware of the impact cost center changes on payroll and outstanding procurement actions and try to prioritize them accordingly. Please send an email to [gcahelp@uw.edu](mailto:gcahelp@uw.edu) for the cost center changes you are waiting for so we can look at the status of the specific items.   **Q9**: We have two grants that have been waiting for GCA to process since 8 SEPT, once of which is from a sponsor that doesn’t grant no cost extensions. At what point should we expect GCA to get to these?  **A9**: GCA suggests sending those two grants as urgent requests using the steps outlined in the [GCA Urgent Requests webpage](https://finance.uw.edu/gca/node/1720).   **Q10**: If we are aware of a known issue that GCA does not have listed, how do we communicate that and get it reflected/actioned?  **A10**: Please send an email to [gcahelp@uw.edu](mailto:gcahelp@uw.edu).   **Q11**: I submitted a MOD 9/12 and since then some of the steps/ info to include in comments has changed. When someone reviews it, I am hoping they will not just send it back to have me continually meet new updates without also reviewing the actual request. (That way I can fix as many problems at once before resubmitting.). Can you address this concern?  **A11**: GCA's process is to review the request and the Comments & History before returning an item to campus. If you think an item is returned inappropriately, please submit an Award Portal ticket and we can take a closer look at the item. |  |  | | --- | | **Q12**: What are "budget dates" in Workday and how should they fall in relation to the "award end date"? GCA indicated on a recently closed award that a journal entry with a "budget date" after the end of the award needed to be moved off the budget or the budget date corrected in order to close. This was specific to the "budget date" on the entry (different from the "accounting date", "transaction date", "PO issue date", "invoice received date"). Do all "budget dates" need to fall before the "award end date" in order to close?  **A12**: All budget dates need to be on or before the award line end date to which the expenses are charged in order to be allowable and eligible for reimbursement by the sponsor.   **Q13**: The directions say to print to PDF and attach OR include the link to the Sage budget. I have had requests rejected because i did the attachment and not the link. So on the next I did the link and not the attachment. and it got rejected because it didn't have the link. I now use valuable time to do both. Suggestion?  **A13**: Initially, GCA accepted either the Excel export or the snapshot URL for Modification Requests. However, when a Modification Request includes creating a new award line in Workday, GCA needs the snapshot URL in order to see the Cost Center and the Grant Security Hierarchy because the Excel export does not include them. To be safe, please consistently include the SAGE Budget snapshot URL.   **Q14**: We have an interim financial report due to our sponsor that is now overdue by 14 days. When do you anticipate GCA will be able to get to these types of reports?  **A14**: GCA prioritizes final financial reports over interim financial reports unless the sponsor requires an interim financial report to submit a payment. Please submit an [urgent request to GCA](https://finance.uw.edu/gca/node/1720) if the financial report presents a risk of non-payment or loss of future funding.   **Q15**: Just to make sure I understand the temporary ADV extension process. We do not need to send in a MOD, instead, we send in an AWARD Portal ticket? Or we need to do both?  **A15**: There is no action needed in SAGE. The temporary process is for campus to submit an Award Portal ticket directly to GCA. Please visit the GCA Advance Awards webpage for more information on how to submit the advance extension to GCA. |  |  | | --- | | **Resources & Links**   * [GCA SAGE Modification Checklist](https://discover.uw.edu/n/MTMxLUFRTy0yMjUAAAGPeOgYy5ORfFok7CuQ1bT7ospiyK7t5rAECVTKb_MyQNaj_iO4a3kMf2lb7CQImXd5VX0UFL0=) * [GCA Urgent Requests](https://finance.uw.edu/gca/node/1720) * [Advance Awards](https://finance.uw.edu/gca/award-lifecycle/award-setup/advance-awards) |  |  | | --- | |  |  |  | | --- | | **Workday Grant Budget to Actual Report** |  |  | | --- | | **Q1**: What is the difference between selecting the security for academy and selecting "all companies"?  **A1**: If you only have access to UW1861 and SOM, there will be no difference. Whether you select All Companies or Academy, it will return results for SOM and UW1861. Some users reported problems with running other reports more open ended (for all companies), so we advise to narrow it down when you can, but we never experienced any problems with this report.   **Q2**: If your sponsor uses the federal fiscal year, should you still use “fiscal year” as the time period? (I assume that fiscal year = UW’s fiscal year instead.).   **A2**: Fiscal Year is always UW fiscal year in these reports. July through June. To run the report for Federal fiscal year, enter Period: September, Time Period: Last 12 periods. Data for the fiscal year will be in the Spent in Current Period column. Remember, this will not work cross era. So for Federal fiscal year September 2022 - October 2023, you will have to get data for October 2022 - June 2023 from FAS, and run R1234 for Period = September 2024, Time Period: Last 3 periods. That will give you July, August and September from WD.   **Q3**: I noticed yesterday that information in the “Worker” and “FTE” columns of R1234 have gone away. Where can we find that information now?  **A3**: The data is still there. On the prompt screen, at the bottom in Additional Options, by default, it shoudl have the option "Include Payroll Details" selected. If it got accidentally unselected, the detail will not be visible.   **Q4**: How do we know when a month has "closed" (prior month payroll posted" in WD?  **A4**: There is month close schedule on [Financial Reporting web](https://finance.uw.edu/fr/month-end-close) with relative dates. You can always run the Ledger Period Journal Status report in WD, you have to run it for each company separately, enter ledger Actuals, and the month you're interested in. Run the report, and in the heading you can see Status: Closed (or, if you run it today for October, it still says Close in Progress). If you select More, select Status History, you can see more details of the closeout process in the grid below, but the heading will give you an overall status. |  |  | | --- | | **Q5**: Is there a glossary defining what all the choice options mean in the fields for the R1234 to help us pick the best choices for what we want to see? Is there a way to see the current fiscal year to date, e.g. July 1 2023 through October, and not for the entire award or only the current month?  **A5**: There is a [job aid here](https://urldefense.com/v3/__https:/uw.service-now.com/finance?id=kb_article_view&sysparm_article=KB0032239__;!!K-Hz7m0Vt54!kn3iXXmKgBLWfFyCWvZY8lwE2n3qjXPV_jNIYVtHAzkDU8caJQwntKb7BZVr-MY9wdWCr7Xod_vJFcM$), but there are so many options that it's hard to create a one size fits all job aid. To see current fiscal year, select Time Period: Fiscal Period, select month, and in Period select Current Period YTD - that will give you current fiscal year to date.   **Q6**: Will there be a function to move to the previous month without having to retype the search field information on these reports?  **A6**: No, that is not in the queue right now, not sure if that's doable in Workday, but the Data Group can start collecting future enhancement requests.   **Q7**: When you expand it can you make a pdf to show all the data in one page? I have been making several snapshots and incorporating and it is time consuming.  **A7**: It is currently not possible to export to PDF with everything expanded, the Data Group are exploring the option to have that added in future.   **Q8**: Is there a WD report that would show balances for all awards and other department funding in a department/unit on a monthly basis, like a dashboard in Workday?  **A8**: Currently, there is no report that would show this in one place. Awards utilize the Award Plan structure and other funding sources utilize the Financial Plan structure, so it is hard to bring these two together in one report. You can run R1209 to see budget vs actual balance by PI for grants with awards - that will display all awards in one place.  **Q9**: If we run the report for previous month, will the current period column have the data for that previous month? or current period is always the last closed month?   **A9**: Previous month. If you run the report for September, Current Period will have September data, Prior Periods will have Life to August data, and Life to Date will have Life to the end of September data. |  |  | | --- | | **Q10**: Can you show the output of the final R1234 report?  **A10**: Output was shown in the meeting, please review the recording.   **Q11**: Can you review/provide resources on interpreting program income section for program income budgets?  **A11**: The top portion of the report all the way to Total Costs is spend - just like the sponsored section of the report, it will show what was budgeted and spent on the program income award line (program income sub budget in legacy systems). Down under Total Costs, there is the Program Income row - that's Program Income revenue.   **Q12**: To my knowledge, we are currently only able to use R1296 for the non-grant accounts (RCR, GOF, etc). It would be nice to be able to use one report template for all of our accounts.  **A12**: This is hard due to the different budget structure.   **Q13**: I was told that anything showing up on the R1234 report has posted to the budget, but I had an invoice that showed up on the report but had NOT actually been paid. Why would this show up on the report if it hadn’t actually been paid?  **A13**: The report will show all expense journals. If the invoice a journal was generated, it will be on the report. We can't bill the sposnor until a supplier invoice has been settled, but it is an expense.   **Q14**: What is the difference between period, and time period?  **A14**: Time Period is the period for which you want to see the results. For example: current month, last 4 months, year to date. Period is what starts the clock. I want to see July, August and September 2023 - then I run it for Time Period: last 3 periods, Period: September. In the Time Period field, Period = fiscal month (so current period is current month, last 3 periods is last 3 months etc.) |  |  | | --- | | **Q15**: I am having trouble with time period. 1. What do I use for award to date? What do I use if I want to see the previous month that closed? What do I want to use to see current month?  **A15**: 1. For Award to Date, use: Time Period: Current Month, Period: Fiscal Period, FY2024 November. This will show Award start through October in the Spend in Prior Periods, November spend will be in the Current Period, and Life to date will be in the Spend Life to Date. You can also run it for time Time Period: Award Period - Life to Date, Period: FY 2024 November. This way, all life to date spend will be in the Spend in Current Period column. 2. for current period (November) Time Period: Current Month, Period: Fiscal Period, FY2024 November. This will show Award start through October in the Spend in Prior Periods, November spend will be in the Current Period, and Life to date will be in the Spend Life to Date. 3) Previous month: Time Period: Current Month-1, Period: Fiscal Period, FY2024 November. Or run it for current period, and in Period select October.   **Q16**: I heard we were not supposed use saved filters? Do we have to re-do all of our filters?  **A16**: Saved filters should survive today's update (11/09). However, your filters will over-write pre-selected values in Additional Options filter. When running a saved filter, please make sure to check the Additional Options prompt and be sure these options are selected: Exclude Pro Forma Journals, Include Payroll Detail, Report by Accounting Date Using Plan Structure.   **Q17**: Is there link to weekly reporting office hours?  **A17**: [https://washington.zoom.us/my/busintel](https://urldefense.com/v3/__https:/washington.zoom.us/my/busintel__;!!K-Hz7m0Vt54!kn3iXXmKgBLWfFyCWvZY8lwE2n3qjXPV_jNIYVtHAzkDU8caJQwntKb7BZVr-MY9wdWCr7Xod949v9Q$) There are two different office hours: 9-10 am it's Enterprise Reporting and Analytics, 11-12 am Finance Reporting (EDW and Workday) Both happen every Friday, and we (DATAGroup) are present at both.   **Q18**: Are there any WD reports that show balances for grants on a monthly basis with object classes details?  **A18**: O nly R1234 has balance (budget vs actual) and object class detail. R1209 has overall balances without object class detail, but will show multiple grants on one report. |  |  | | --- | | **Q19**: Will this report work for GR# within an award? That is, can we run sub-budgets?  **A19**: It will not run for a grant without award. You have to know your award. If you don't, enter the grant in the Search field in WD and when you get results, under Usages, click on the underlined number "1" to get your award ID that you can enter into R1234. You always have to enter the award. But you can run it only for one grant/sub-budget under that award. Enter the Award ID, and the in the optional Grant field enter the grant (can be or more than one) and this way, it will run for only that one grant. |  |  | | --- | | **Data Group Resources and Links**   * Reporting Office hours every Friday, Data Group present at both:   + Enterprise Reporting and Analytics 9-10 am   + 11-12 am Finance Reporting (EDW and Workday)   + [https://washington.zoom.us/my/busintel](https://urldefense.com/v3/__https:/washington.zoom.us/my/busintel__;!!K-Hz7m0Vt54!kn3iXXmKgBLWfFyCWvZY8lwE2n3qjXPV_jNIYVtHAzkDU8caJQwntKb7BZVr-MY9wdWCr7Xod949v9Q$) * Financial Reporting - [Month-End Close](https://finance.uw.edu/fr/month-end-close) * [Reporting Periods on Grant Budget vs. Actual Report Job Aid](https://urldefense.com/v3/__https:/uw.service-now.com/finance?sys_kb_id=49a33d69c35a7dd0926e19a4e401311d&id=kb_article_view&sysparm_rank=1&sysparm_tsqueryId=fdd065ddc322bd98926e19a4e40131f1__;!!K-Hz7m0Vt54!kn3iXXmKgBLWfFyCWvZY8lwE2n3qjXPV_jNIYVtHAzkDU8caJQwntKb7BZVr-MY9wdWCr7Xoc2QkETE$) |  |  | | --- | |  |  |  | | --- | | Thank you, MRAM |  |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | [**11/09 MRAM Material**](https://discover.uw.edu/MTMxLUFRTy0yMjUAAAGPeOgYy7ZluxyHSJA2rBhHX4EGtSFkiu6Q--CwaMvCGQ9ke6MuZaWXoY94gQApN5PGTfcUl7U=) |  | |  |  |  |  | | --- | --- | --- | | [**UW Home**](https://discover.uw.edu/MTMxLUFRTy0yMjUAAAGPeOgYyzaSd-ymZZ2AccdUhqLo4w11efaKj_1K98u_Z7hOmXh5y_Fw16o9ZpxqBX9m3rNAqd4=) |  | [**MRAM**](https://discover.uw.edu/MTMxLUFRTy0yMjUAAAGPeOgYy1WXugfb7jph8SOlRQok2S4hV2vEqb-VTXunrvCiXGFf1wScjVv7UZkNZN6Lzg6PNYU=) |  |  | | --- | | [Contact Us](https://discover.uw.edu/MTMxLUFRTy0yMjUAAAGPeOgYy7Q1HIDOvsGHNvUdvHfp7r2xWJMCl1PiUFO4K8hBJuhl2zXdlmQ_0-j3Pka52xsZWng=)   |   [Privacy](https://discover.uw.edu/MTMxLUFRTy0yMjUAAAGPeOgYy_8ZTDy4esa_sO8MA7os_w6cF-XZQlIYz-spuC8BFmHZeH9Upg_vwJ3eWi2S6d7fZa8=)   |   [Terms](https://discover.uw.edu/MTMxLUFRTy0yMjUAAAGPeOgYyxNJQTtGada6SonkrGhArogyVxvJYzlOuAEdX23qy9qsbDX4hV-VfmYIXB0Zl91szsw=) | | This email was sent to [mdavis25@uw.edu](mailto:mdavis25@uw.edu) [Unsubscribe or change your email preferences](https://discover.uw.edu/dc/s0_afFuVBeZpG5HfC2pItdoyk_iXqjUzdyU9feBL9niw9StyPnLEmqJsTJOlbjtgXDeSeeu3hz6c5Ttevyih_SWlr56HQo-fW_BMyVZ9-Tti9EzZwWfUSJgnf2dj4i61c8OAg3wCzzy7svDsLjPToWblgFWH2WH1PKlNdsPSK5nbVOLnCPFp22KjlF3tyZVa/MTMxLUFRTy0yMjUAAAGPeOgYy6R_u8q-hkn8ziUqW-UDWf9sml2k8FgYhs3wJJCnNZBaqusaTycScuC5Xx7qeuR0XYY=) | | | | |

