May 19 Q&A
UWFT-Focused MRAM

Greetings Colleagues,

The bonus May 19 UWFT-focused MRAM material is published along with the May 11th materials for your review. Q&A from our session are included here for reference and will be available with the other meeting materials shortly.

Q: Can you make this slide show available so we can refer back to the various dates for the various processes?
A: Important dates for Sponsored Programs (including those shared today for subawards and cost share) are on the Research website now.

Subawards - Preparing for WD Finance Go-Live

Q1: We have an outgoing subaward we were thinking we would issue now prior to UWFT go-live but the first invoice would not be received until July or August. Do you recommend we do this now, and if so, would we need to do the Ariba process? Or should we just wait for go-live? What would be easiest for OSP?
A1: You can submit the request for the new subaward now. You would still need to create a BPO in Ariba for any subawards submitted before June 5th.

Q2: Training is being limited by role. Will grant managers receive training and be authorized to submit "Procurement Supplier Invoice Requests?
A2: Based on the Workday Security Role Guide, the Grant Manager security role will be able to approve supplier invoices. Please see pages 24-25 of the Workday Security Role Guide for the full list of Workday Tasks lists for the Grant Manager role.

Q3: For outgoing subs that were begun in Ariba and will still be in place in Workday Finance, can those BPOs in Workday Finance be backdated to accommodate invoices

that were submitted during the blackout period?

A3: Yes, subaward Purchase Orders can accommodate invoices for the active period of the subaward.

Q4: Please confirm if All subaward BPOs should/need to be closed by 6/12 by the department?

A4: No. You should only close subaward BPOs that are complete and the final invoices have been received and payment has been made. Subaward BPOs that have a balance and will be continuing as a Workday Finance purchase order will be converted.

Q5: What needs to be done with BPO review with subs?

A5: All BPOs should be reviewed to make sure all invoices have been received. Follow the guidance from Procurement from the [Open Orders from their March newsletter](#).

Q6: Will BPOs transfer if they have a balance but the budget has closed?

A6: No. If the budget has closed, a purchase order will not be converted.

Q7: Can we upload any unpaid invoices for the subcontractor, or will they have to be asked to resubmit the invoice(s)?

A7: Units can submit invoices they received from the subcontractor, subcontractors should not have to resubmit previously submitted invoices.

Q8: How many subaward lines are available?

A8: There is no limit to the availability of award lines. Each subaward will be assigned to individual award line(s). If the subaward is issued supplement/extensions over the period of the award, a single award line is assigned. If the subaward is issued renewals (typically annually), then each period will be assigned to its own award line.

Q9: For multi-project e.g. U19 projects - if one site participates in multiple components (e.g. Project 1, Core B), do we do one subaward sheet in SAGE?

A9: This will depend upon whether you anticipate one subaward to the subrecipient institution or separate subawards to the subrecipient institution for each component. If there will be separate subaward agreements, you would enter separate sheets in SAGE Budget in order to create separate award lines in Workday. You can consult with the OSP subaward team ospsubs@uw.edu on how to structure the subawards as multiple factors will impact this decision.

Q10: Will there be a future-state Subaward 'manual' posted on the OSP website,

complete with steps to how to navigate through the different subaward scenarios within Workday?

A10: The Subawards Quick Guide will be updated to reflect any changes to the subaward process within SAGE. Guidance for Workday processes will be in resources from UW Finance.

Org Codes to Cost Centers

Q: How will we assign awards to the appropriate grant hierarchy?

A: In the future state, you will need to know the Cost Center associated with your grant. Any translation between cost center and grant hierarchy will be happening behind the scenes through our mapping tool.

Clinical Trials & SAGE Budget

Q1: If there a mPIs, do all need to be entered - or just the contact PI?

A1: Only the Principal Investigator needs to be entered for the SAGE Budget Worksheet. However, you can also enter application PI or additional PIs if you wish to.

Q2: If we create a budget proposal in Excel, can we still submit it as an attachment to eGC1?

A2: Yes, to submit your eGC1. But SAGE Budget will be required at time of award when you submit your Award Setup Request.

Q3: Is there a benefit to set up 1 period with 60 months vs. 5 periods of 12 months each on clinical trials?

A3: The number of periods entered in a SAGE Budget will influence the Workday Award Schedule. If you enter multiple periods, you will need to select each period in the Award Setup Request

Advance Budgets Conversion

Q: Will the advance spend status be automatically assigned for advance spending to all new budgets?

A: "Advance Spend" will be the status for converted advance budget numbers that aren't expired and new advance requests when GCA sets them up after go-live. New awards created in Workday Finance will be set up with a status of "Open". Both will allow expenses to post.

Award Portal

Q1: For award portal, what is the difference between "award" and "grant"
A1: In Workday, all of the sponsor's terms and conditions are captured in the Award.

A grant is a driver worktag that serves as the primary cost and revenue collector for an award. It is associated with an award line (1-to-1 relationship). You can review Workday and Research terms in [Knowledge Navigator](#) or in the [Workday glossary](#) for grants.

Q2: Re: Award Portal, you said that GrantTracker will not go away and we will continue to use it for historical information (is that right?) - does that mean that Grant Tracker communications will not be converted to / available in Award Portal?
A2: Grant Tracker Notes will be converted to Award Portal Tickets as long as they're connected to an award that is converting to Workday.

Q3: When you organize your view, does it stay that way when you leave the page and across grants? Or do you have to update your view each time you enter award portal?
A3: Initially, you may have to reorganize this each time - but this is likely going to be improved.

Q4: Will there be Campus Contacts?
A4: Yes, there will still be campus contacts. The person in the Workday Grant Manager role associated with the award will pre-populate as a contact but additional contacts can be added as well.

Q5: Will award portal tickets still send emails for updates?
A5: Yes, campus contacts will receive an email when a new ticket is created or an update is made.

Q6: How will the current "parent and sub-budgets" look like in the Award Portal for future state? Will we still be able to see how many subs are under a parent budget?
A6: Each parent budget number and each sub budget sub budget number will have their own award line that you will see in the Award Line Financial Information section of Award Portal. There will be separate award lines for cost share, outgoing subcontracts, fabrications and program income.

Q7: Will there still be an FAD report available?
A7: Yes, in the CC Reports tab in Award Portal, users will be able to run a report called

"Grants With Final Action or End Dates in Next 90 Days" using one or multiple cost centers, similar to Grant Tracker.

Q8: Can we get sandbox access to the Award Portal?
A8: There are no plans to provide access to a sandbox version of Award Portal before it goes live on July 11.

Q9: Will NIH SNAP Awards continue to be set-up for the full project period? At other universities using Workday, SNAPs are not.
A9: No. In Future State, SNAP awards will be setup based on the Budget Period outlined on the award document. Review an example: [SNAP Award Setup - Current State vs Future State Comparison](#).

Q10: What will the process be when we need to add detail with an invoice and send it directly to a Sponsor?
A10: The process will start when GCA reviews the award and adds invoicing and reporting special handling to a comments section in the ASR that campus recipients can see upon notification. GCA will set the award up with a specific invoice type in Workday that indicates whether GCA or the unit is responsible for submitting the invoice to the sponsor. These invoice types allow GCA to generate an invoice but not submit it to the sponsor, providing an opportunity to attach additional documentation. GCA will notify the unit that the invoice is ready to view in Award Portal and to attach the necessary documentation before submitting to the sponsor.

Q11: Did I miss download capabilities? What will Award Portal have to download our FAD's in bulk?
A11: Award Portal campus users will be able to download the report "Grants With Final Action or End Dates in Next 90 Days" and export the results to Excel, similar to Grant Tracker.

Cost Share Cutover at Workday Finance Go-Live

Q: Will there be an upcoming presentation on how salary cap will be tagged on costing allocation entries beginning 7/1/23?
A: The UWFT Grant Award to Close team is planning to attend an upcoming MRAM to present on the salary cap process in Workday.

Role Based Training

Q1: Where do we find the Job aids?
A1: Job aids are scheduled to be delivered by June 1 and will be on the Bridge LMS.

Q2: How long will the sandbox be available? When do clinics start and how long will they run?
A2: If you are attending a live training, a link will be sent out to you. The sandbox will no longer be available shortly after go-live.

Q3: When should we access to sandbox after completing first functional training?
A3: If you attend a vILT course, your link to the sandbox will be sent after completing the course evaluation at the end of class. . If you attend a self-paced training or elearning, links will be send out at least once a week, on Fridays.

Q4: If you haven't already registered for VILT training, is it too late to take courses prior to go-live?
A4: It is not too late to register for vILT courses, but class do will up. The longer you wait, the fewer options will be available. vILT courses will only be available through go-live. Afterwards, recordings will be available in Bridge LMS

Q5: At some point (perhaps after go-live), will all functional trainings be/become available regardless of security role? Even if executing particular processes aren't part of my role, it's helpful for me in my role to know how a broad range of processes work.
A5: Yes, all course- foundational and functional courses will be available to everyone post go-live.

SAGE Training - Workday Finance

Q1 : Will Workday security roles impact our ability to interact with SAGE? E.g., if I don't have a "Grant Manager" security role, will I still be able to submit eGC1s, or execute other processes in SAGE?
A1 : Your Workday roles will not impact your SAGE roles.

Q2 : Can we continue to submit new eGC1 through SAGE? Is there a deadline to submitting eGC1 for new proposals?
A2 : Yes. You can continue to submit eGC1s in SAGE. The only time you will be unable to submit eGC1s is during our SAGE outage window for launch, July 5, 5:35 p.m. - July 7, 6 a.m.

Q3 : What about a reviewer outside the department. Sometimes the School eGC1 reviewer needs to go into the eGC1 to take it over and/or make changes.
A3 : You will still be able to add ad hoc reviewers as needed. This functionality will work as it has in the past.

Thank you,
MRAM

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