Symposium for Research Administrators

University of Wisconsin-Madison

November 7th, 2024

Workday:
A Glimpse Into the Future

Administrative Transformation Program

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Disclaimer

ADMINISTRATIVE TRANSFORMATION PROGRAM

This presentation may contain forward-looking statements for which there are risks, uncertainties, and assumptions.

Forward-looking statements include any comments regarding Universities of Wisconsin design considerations or plans for future processes, as well as any comments concerning new features and configurations.

Forward-looking statements are subject to change, and therefore, what is seen today could differ materially from results implied by the forward-looking statements.

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Learning Objectives

Timeline of activities in the coming year
- Recommended actions to prepare for cutover in SFS
- Tentative timeline of key ATP activities

Major Change Impacts
- FDM structure
- Cost Share budgets in RAMP and Cost Share Grants on transactions
- Salary Cap

Key Reports Preview
- Award Search
- Award Budget to Actuals

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Workday Glossary

- Log into browser with NetID

- Use QR code to access Workday crosswalk glossary during presentation

- [Workday Terminology and Crosswalk](#)

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ATP Project Timeline

- **Today – December 2024:** Testing of all business processes from start to finish

- **Today – December 2024**: Ancillary systems integrations testing

- **Today – January 2025**: Security Role Mapping Round 3

- **January – April 2025:** Continued ancillary systems integrations testing

- **January – February 2025**: Dress Rehearsal tenant build

- **January – July 2025:** Cutover planning

- **March – June 2025:** Formal training delivered

- **July 2025:** Workday go-live.

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ATP Testing Activities

ATP and selected end users perform the following tests in the coming months:

- **Payroll parallel testing**: Validates that the Workday payroll results matched the current Universities of Wisconsin payroll data
- **Performance testing**: Validates that important functions and integration schedules will perform as needed
- **Regression/release testing**: Tests anything not included in the second round of E2E, such as retrofits of campus systems and integrations; also confirms the system functions as planned following new releases from Workday.

After testing is completed, ATP conducts a **dress rehearsal**, which lets us practice moving to the final Workday setup and helps us validate or refine our cutover plan.

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Security Role Mapping

Use the Workday Security Role [Tableau Dashboard](#) to view assignments by Campus, Business Area and Organization or Employee.

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Workday Security Roles

Security defines what a user can see and do in Workday
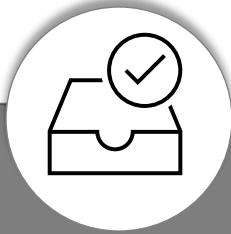
Defines what actions a user can perform
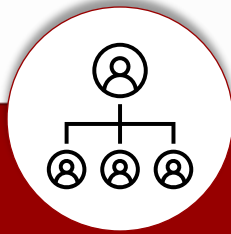
Defines where a task is routed to for review and approval

Controls what data a user can view

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Do vs View

View access

Transaction access
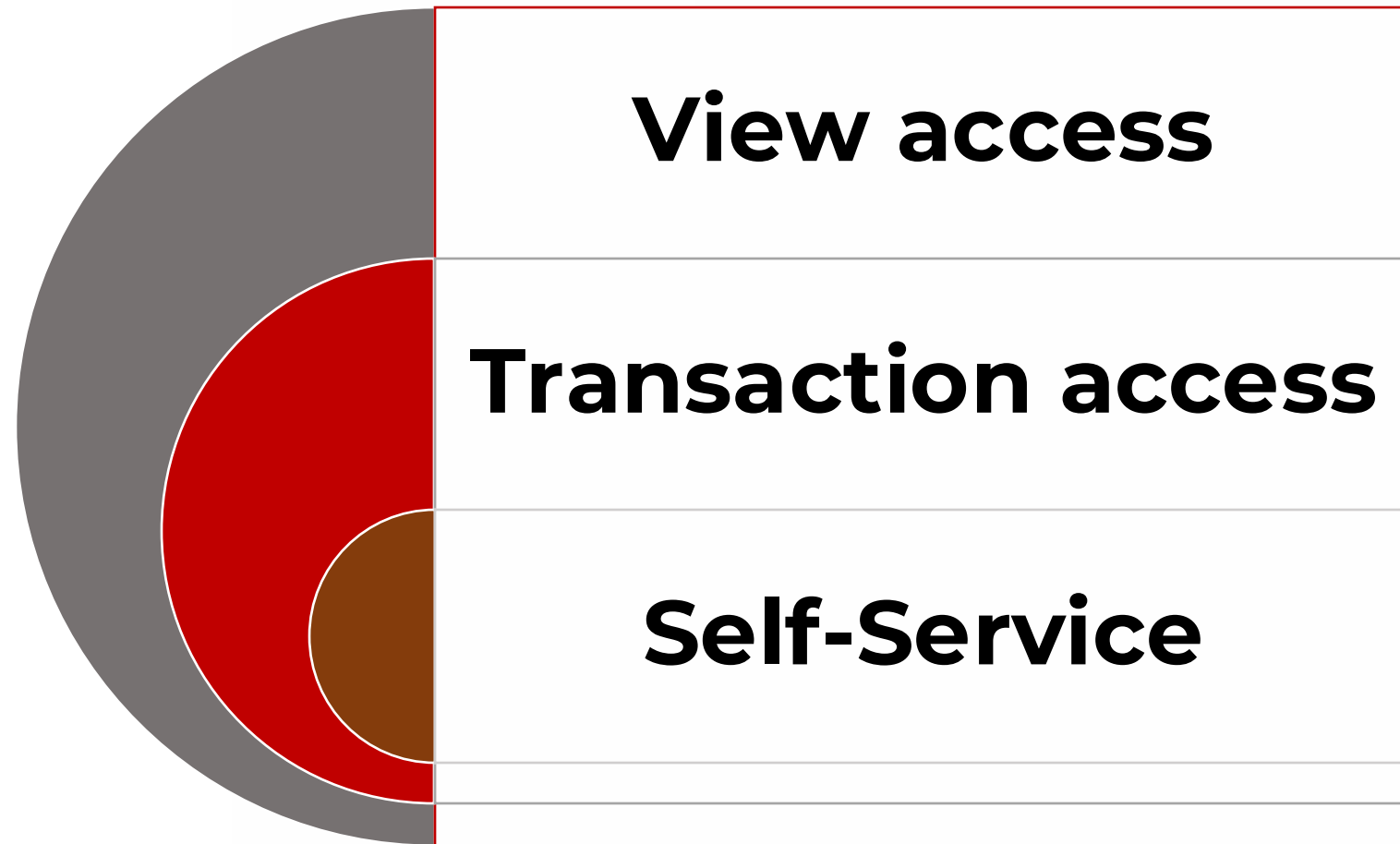
Self-Service

Self-Service
- All UW users
- Employee: View / Take Action on MY information
- Manager: View / Take Action on MY Team's information

Transaction access ("Do")
- Roles that give you permission to take action (initiate, approve, modify)
- Constrained for specific organization(s) that you support

"View" access
- Roles that let you see data
- Typically used for reports
- Most users will be able to view more data than they can transact on
- Will be paired with some Do roles

Security Role Mapping round 3

The mapping mechanism depends on the type of role

- Campus Mappers update Company Roles in JIRA when **staffing changes**
  - Central Office roles like Award Billing Specialist and Award Contract Specialist
- Award Roles will be mapped in a new Smartsheet tool
  - Initial Central Award Accountant and Award PI assignments will come from SFS.
  - **CHANGES** to Co-Principal Investigators and Co-Investigators will need **Smartsheet updates**.
  - **CHANGES** to Central Award Accounts should be made on **SFS Bill Schedules**.
  - **CHANGES** to Award Principal Investigators should be made on the **award in SFS** when possible.
- FDM Mappers will use the FDM Mapping tool to map Grant Manager and Grant Principal Investigator roles for **SFS Sponsored Projects.**
  - **Grant Principal Investigator** should be updated in **SFS** when possible

New Role – Divisional Grant Approver

Role Type
- Role-Based Constrained

Enabled for
- Assigned on Grant and/or Grant Hierarchy

Description
- This role approves salary and non-salary cost transfers for all grants in the assigned division. Assigned for UWMSN divisions. This role is single assignment.

Timeline
- We will not map until we add a level in the Grant Hierarchy – Plan for mapping in February/March.

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Research Admin Training Courses

FUNCTIONAL AREA COURSES

Research Admin Fundamentals
Computer Based Training (CBT)
- Ramp vs Workday
- Award Structure
- Key Reports

Grant Management for Dept/Divisions Webinar
- View financial info for grants/awards
- Subawards
- Cost Share

Award Management for Sponsored Program Staff Webinar
- Cost Share
- Award Closeout Process
- Residual Balance Transfers

Award Set Up & Modification Webinar
- Including Award Tasks and Modifications
- Award Budget Hub Event
- Award Billing Schedule Event

Sponsored Programs Billing & AR In Person Learning Training (ILT)
- Letter of Credit Draw Down Event
- Create Invoices for Cost Reimb. Award Trans.
- Create Customer Invoices for Billing Installments
- Clinical Trial - Create Customer Invoice
- Record Customer Payment (For Sponsors)

SHARED FIN & RA COURSES/CONTENT

FIN/RA - Finance Core Concepts: CBT
- Cost Centers & Security Roles
- How the FDM Works/Touchpoints
- Worktags – Driver & Related
- Key FIN Reports

FDM: Job Aids
- FDM Crosswalk Tool
- FDM Touchpoints (including Worktags)

Basics of Approvals: How-to Video & Job Aids
- Approval Actions

Fin. Transaction Approvals & Reporting: CBT
- Grant/Gift/Project/Program Worktags
- Approver Responsibilities
- G/G/P/P Report to Track Spending
- Example Approvals & Helpful Reports (Expenses, Time, Procurement, ISD)

Subawards: How-to Videos & Job Aids
- Supplier (Subaward) Contract Initiators
- Supplier (Subaward) Invoice Initiators
- Supplier (Subaward) Contract Approvers
- Supplier (Subaward) Invoice Approvers

CROSS-FUNCTIONAL TOPICS

Employee Self-Service: CBT

Manager Self-Service: CBT

EIBs: Job Aids, How-to Videos
- EIB Touchpoints
- Basics of using them
- Module Area-specific training, where identified

Reporting: Job Aids, How-to video
- Basics of Reporting in Workday
- Scheduling & Running Reports
- Note: Key reports module included w/most courses

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Cutover

High-Level Dates

Normal HR business in HRS — 6/14/25
Limited critical transactions (HR) — 6/15/25 to 6/28/25
No HR transactions — 6/29/25 to 7/6/25

Normal financial transactions in SFS — 6/17/25
AR, POs only — 6/25/25
No Finance transactions — 6/26/25 to 7/6/25

workday. First Days in Workday — 7/7/25

Legend: Soft Freeze, Hard Freeze

Cutover Activities

Pre-Cutover Activities	Cutover Activities	Post Cutover Activities
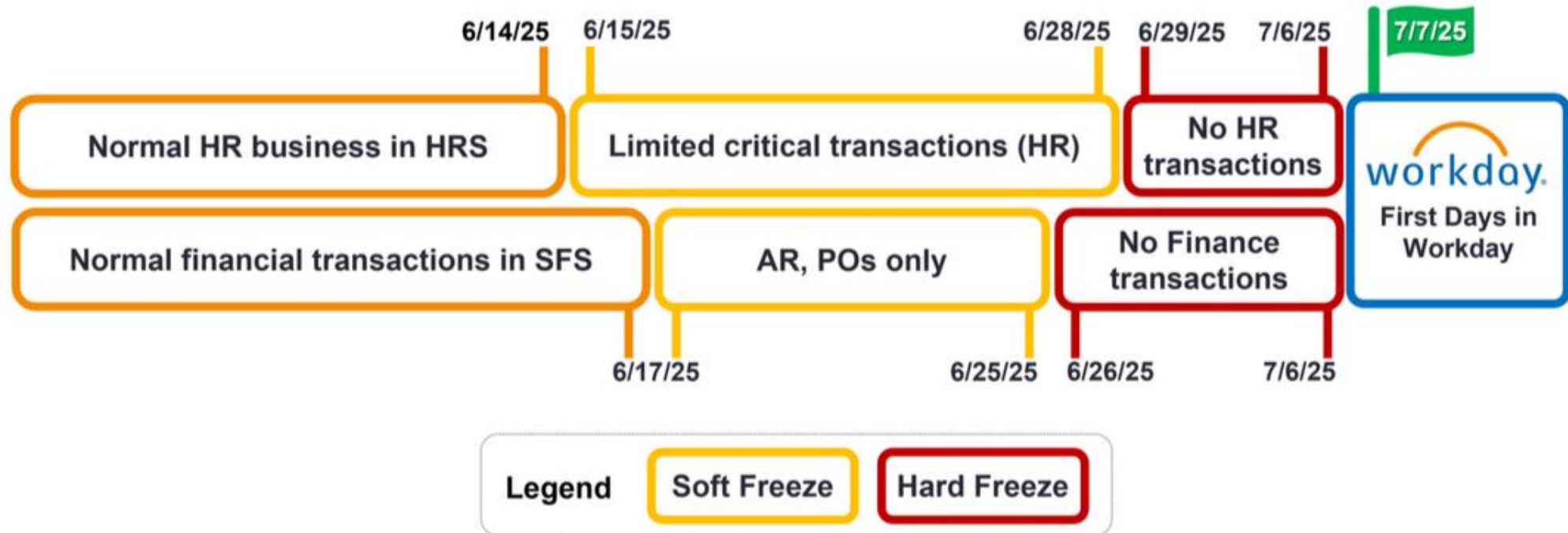
Pre-Cutover Activities

- Deliver trainings
- **Complete data cleanup**
- Finalize tenant validation plan
- Transition to Operational Support Model
- Finalize data conversion activities
- Finalize FDM values and crosswalk
- Prepare for system downtime
- Complete readiness assessment

Cutover Activities

- Freeze systems & transaction entry
- Convert and reconcile data
- Complete Workday DA reviews
- Secure go-live authorization
- Build, test, and deploy Gold tenant
- Initialize & verify extended systems
- Complete manual tasks in tenant to prepare for end users

Post Cutover Activities

- Process transaction and interface backlog
- Perform operational support activities
- Stabilize solution
- Turn off access to legacy systems
- Complete post cutover conversions

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Conversion Preparation

Please do these NOW!

- Resolve over drafts on Awards/Projects
- If Cost Transfers are needed, do them in SFS – don't wait for Workday!
- Resolve salary cost share errors
- Provide non-salary cost share details for Cost Share bolt-on entry
- Take action on the messages coming from RSP and ATP!
- RAMP will also be down for a period of time, watch for instructions

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Major Change Impacts

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Workday Worktags Quick Reference Guide

Workday Worktag	Type	Driver vs. Related	Balancing	Payroll Costing	Hierarchies	Definition	SFS Value
Company	Delivered		X	X	X	Represents legal entities and/or organizations that require their own set of financial statements. Represents distinct universities within the UW System - including the System Office.	Business Unit
Cost Center	Delivered	Related	X	X	X	Generally identifies a university department. Typically, a cost center has a budget, employees and on-going expenses assigned to it.	Department ID
Grant	Delivered	Driver	X	X	X	Used to manage sponsored awards. Grants are their own functional area in Workday and have extensive functionality behind them to support post-award research administration.	Project
Gift	Delivered	Driver	X	X	X	Used to track donor contributions and amounts available to be spent within donor restrictions. Gifts can either be endowments or spendable gifts.	Project
Project	Delivered	Driver	X	X	X	Typically have a defined start and end date. Project budgets can be created outside of the fiscal year budget. Projects can be used for faculty projects, building & building improvements, fabricated equipment, and internally funded grants.	Project
Program	Delivered	Driver	X	X	X	All other programmatic funding tracked at the cost center level that is not a gift, grant or project is a program. This driver worktag is used for revenue and expenses covering a range of specific situations, such as (but not limited to) academic, student or public service programs that do not have a designated start or end date.	Department ID

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Workday Worktags Quick Reference Guide

Workday Worktag	Type	Driver vs. Related	Balancing	Payroll Costing	Hierarchies	Definition	SFS Value
Activity	Custom	Related		X	X	Used to track and report revenue and expenses for localized activities that are short-lived or annually reoccurring and not necessarily reported on at a higher level within the System. Activities will be manually added to transactions and used in conjunction with one of the driver worktags.	Department ID
Fund	Delivered	Related	X	X	X	Identifies the funding source to facilitate financial reporting. Funds will be shared across companies. Fund groups will be represented with fund hierarchies and will use a fund type attribute.	Fund
Function	Custom	Related		X	X	Identifies the general purpose of a transaction such as instruction and research. Mapped to NACUBO values.	Program Code
Ledger Account	Delivered				X	The natural account where debits and credits are recorded against. Ledger accounts will be summarized into hierarchies for financial reporting. Ledger accounts are inherited through account posting rules based on the selected revenue or spend category.	Account Code
Spend Category	Delivered				X	Used to identify and categorize the distinct types of expenditures reported by the company. They allow for a sub-classification of expense ledger account at a more granular level to streamline the chart of accounts with fewer expense accounts.	Account Code

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FDM Account Code Crosswalk

https://fdmmapping.atp.wisconsin.edu/Crosswalk

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Cost Share Transformation

- The SFS Cost Share SFS bolt-on will be going away with Workday

- Cost Share budgets can be entered to track Cost Share commitments and spend

- Cost Share Grants will be entered on spend transactions along with the Worktags that fund the Cost Share
  - Payroll Costing Allocations for salary and fringe cost share
  - Expense reports for travel
  - Procurement transactions for equipment and supplies
  - Internal Service Delivery (Internal Billing) purchases

- If a Cost Share Grant is mistakenly not included on a transaction when it was processed, Accounting Adjustments or Manual Journals will be needed to correct the transaction

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Award Lines with Cost Share Grant

| | Overview | Award Lines | Budget | Award Tasks | Billing & Receivables | Additional Data | Additional Reports | Set Up & History |

Award Lines Overview   Award Line Summary   Award Lines

2 items

From Date	To Date	Current Amount	Billed Amount	Grant	Billing Schedule	Contract Line Type	Current Rate	Rate Agreement
06/01/2023	05/31/2024	$73,605.00	$0.00	GR000027196 UWMSN	FY23 USDA-ARS RSA 58-5090-3-00 AAL8556	BIUWMSN_MSN279180_1_B101	Cost Reimbursable	10.00%	UWALL - TDC Exception Rate Agreement (07/01/2021)
06/01/2023	05/31/2024	$0.00	$0.00	GRC00027196 UWMSN	Cost Share For FY23 USDA-ARS RSA 58-5090-3-007_Simon_TaskOrd		Fixed Amount	10.00%	UWALL - TDC Exception Rate Agreement (07/01/2021)

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Workday Cost Share Setup

- RAMP will push committed Cost Share budgets into Workday where a dedicated Cost Share Grant and Award Line will be established on the Award with the Cost Share requirement

- Fund FD0750 has been established for Cost Share Budget Entry

- Once integrated to Workday, Cost Share Grant setup is part of the Award Setup process. The result is a Cost Share Grant worktag with a budget ready for spending and F&A calculation.

- When a Cost Share requirement is identified after an Award has been set up, a RAMP Award modification will be pushed into Workday where the Award correction is completed

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Cost Share Transactions in Workday

- Cost Share Grants will be added to transactions funded by UW non-sponsored sources. **There will always be two driver worktags on UW Funded Cost Share transactions recorded in the Common Book** – Grant **and** either Program, Gift or Project.

- The Cost Share Grant must be the first driver worktag entered on a transaction. The non-sponsored funding source driver worktag (Program, Gift or Project) will then default the correct related worktags (Fund, Cost Center, Function) on the transaction.

- Cost Share F&A and Third-Party Cost Share will be recorded in a Grant Reporting - Cost Share Book for reporting purposes. F&A expense will not be posted to the funding source providing the budget for the Cost Share transaction.

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Payroll Costing Allocation with Cost Share

Current and Future Costing Allocations						
Start Date	**End Date**	**Costing Allocation Level**	**Position**	**Costing Company**	**Costing (As of Start Date)**	**Distribution Percent**
7/1/2023	6/30/2024	Worker Position	P00005033 Professor -	UWSTP University of Wisconsin Stevens Point	Cost Center: CC001033 UWSTP | CNR | Human Dimensions & Natural Resources Management (HDNRM) Function: FN0200 Instruction Fund: FD0102 GPO - Non-Doctoral Cluster Location: Trainer Natural Resources Building-0012 Program: PG000010900 UWSTP | CNR | HDNRM Operations	5.00%
7/1/2023	6/30/2024	Worker Position	P00005033 Professor -	UWSTP University of Wisconsin Stevens Point	Cost Center: CC002163 UWSTP | CNR | Center for Land Use Education (CLUE) Function: FN0500 Public Service Fund: FD0104 GPO - Extension Programs Location: Trainer Natural Resources Building-0012 Program: PG000010845 UWSTP | CNR | CLUE Operations	70.00%
7/1/2023	6/30/2024	Worker Position	P00005033 Professor -	UWSTP University of Wisconsin Stevens Point	Cost Center: CC001033 UWSTP | CNR | Human Dimensions & Natural Resources Management (HDNRM) Function: FN0200 Instruction Fund: FD0102 GPO - Non-Doctoral Cluster Grant: GRA_05_02_Cost Share GRA_05_02 Cost Share Location: Trainer Natural Resources Building-0012 Program: PG000010900 UWSTP | CNR | HDNRM Operations	25.00%

Payroll Actuals Examples

Ledger Account	Debit Amount	*Cost Center	*Fund	*Function	Grant	Gift	Project	Program	Additional Worktags
Sponsor Funded									
5006:Salaries - Faculty	1,166.67	CC001029 UWSTP | CNR | College of Natural Resources - CNR Dean's Office	FD0144 Federal Aid - Special Projects	FN0500 Public Service	GR000024602 UWSTP | USDA Forest Service LSR Bird				Object Class: Sponsored Programs: 1000 Personnel Pay Group: UW-Stevens Point
Cost Share funded by Program									
5006:Salaries - Faculty	964.04	CC001033 UWSTP | CNR | Human Dimensions & Natural Resources Management (HDNRM)	FD0102 GPO - Non-Doctoral Cluster	FN0200 Instruction	GRC000024602 UWSTP | Cost Share for USDA Forest Service LSR Bird			PG000010900 UWSTP | CNR | HDNRM Operations	Object Class: Sponsored Programs: 1000 Personnel Pay Group: UW-Stevens Point
Program Funded not Cost Share									
5006:Salaries - Faculty	714.29	CC001009 UWSTP | CPS | School of Health Sciences & Wellness Administration	FD0189 Extension Student Fees	FN0200 Instruction				PG000003251 UWSTP | CPS | HIMT Administration	Pay Group: UW-Stevens Point

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Non-Payroll Transactions with Cost Share

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Budget to Actuals Report with Cost Share

Object Class	Authorized Amount					Cost Share			
	Authorized Amount Budget	Actuals	Obligations	Remaining Authorized Amount Budget	Deviation %	Cost Share Budget	Cost Share Actuals	Cost Share Obligations	Remaining Cost Share Budget
Sponsored Programs: 1000 Personnel	574,050.00	93,886.91	19,315.65	460,847.44	18.2%	300,000.00	79,584.65	4,626.31	215,789.04
Sponsored Programs: 1500 Fringe Benefits	181,413.00	31,683.35	7,101.69	142,627.96	5.7%	100,000.00	29,082.72	1,688.60	69,228.68
Sponsored Programs: 1700 Tuition Remission	46,800.00	3,999.99	0.00	42,800.01	1.6%	0.00	0.00	0.00	0.00
Sponsored Programs: 2000 Supplies	104,028.00	4,524.70	26,413.50	73,089.80	3.8%	0.00	338.00	0.00	⚑ (338.00)
Sponsored Programs: 2500 Domestic Travel	31,175.00	400.00	0.00	30,775.00	1.2%	0.00	0.00	0.00	0.00
Sponsored Programs: 2700 Foreign Travel	0.00	2,400.00	0.00	⚑ (2,400.00)	(0.1%)	0.00	0.00	0.00	0.00
Sponsored Programs: 3500 Equipment	7,993.00	6,000.00	0.00	1,993.00	0.1%	0.00	6,000.00	0.00	⚑ (6,000.00)
Sponsored Programs: 4000 Other Direct Costs	86,137.00	3,704.74	0.00	82,432.26	3.1%	0.00	6,601.01	0.00	⚑ (6,601.01)
Sponsored Programs: 4200 Other Direct - No IDC	0.00	110.77	0.00	⚑ (110.77)	(0.0%)	0.00	225.00	0.00	⚑ (225.00)
Sponsored Programs: 4500 Subcontracts	1,032,102.00	20,000.00	464,984.00	547,118.00	38.4%	0.00	0.00	0.00	0.00
Sponsored Programs: 6800 3rd Party Cost Share	0.00	0.00	0.00	0.00	0.0%	58,393.00	40,028.38	0.00	18,364.62
Direct Cost	2,016,898.00	162,710.47	517,814.84	1,336,372.69	70.4%	458,393.00	161,859.76	6,314.91	290,218.33
Indirect Cost	569,875.00	86,912.79	0	482,962.21	18.3%	200,000.00	47,362.05	0	152,637.95
Total	2,633,573.00	253,623.25	524,129.75	1,855,820.00	90.4%	658,393.00	209,221.81	6,314.91	442,856.28

Awards with Cost Share Report

Awards with Cost Share (UW) (2265)

Company	*	✕ UWMSN University of Wisconsin Madison (•••) ☰
Sponsor		☰
Prime Sponsor		☰
Cost Center		☰
Cost Center Hierarchy		☰
Fund		☰
Award		☰
Award Lifecycle Status		✕ Open (•••) ☰
Award Groups		☰
Principal Investigator		☰
Award/Grant Management Employee		☰

Third Party	Payroll	Non-Payroll	Mandatory	Waived F&A	Cost Share Required	Cost Share Total Amount
No	No	No	Yes	No	Yes	$658,393.0

Cost Share Conversion plans

- Identify Cost Share requirements in SFS from Terms or the presence of a salary cost share schedule as of the tenant build date

- Copy the Primary Grant on the Awards with Cost Share to create a Cost Share Grant using the prefix GRC – with the same number and name as the primary grant

Example:

Grant

GR000027196 UWMSN | FY23 USDA-ARS RSA 58-5090-3-00

GRC00027196 UWMSN | Cost Share For FY23 USDA-ARS RSA 58-5090-3-007_Simon_TaskOrde

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Salary Cost Share Cut Over Activities

- Identify Employees with Salary Cost Share requirements beyond 07/01/2025 and obtain a file that contains their conversion Payroll Costing Allocations

- Translate SFS Cost Share FDM values to Workday values

- Update Workday Assign Costing Allocation EIB for those employees to include the applicable Cost Share Grant(s) with the appropriate funding sources.

- Return the file to the ATP Payroll Team to load in Workday.

Salary Over the Cap – Current vs. Future State
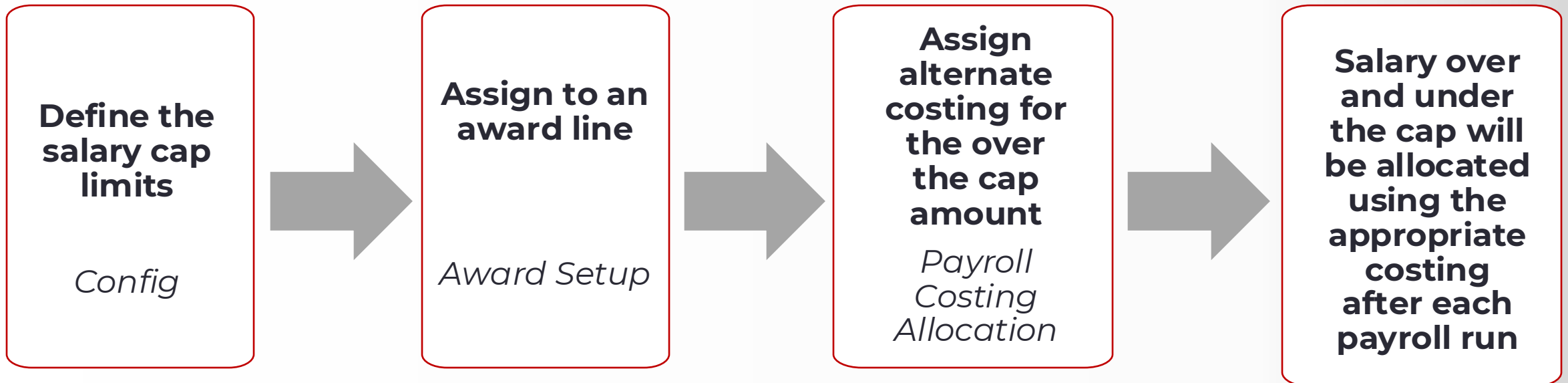
Current State
Manual calculations required to appropriately allocate funding in HRS between allowable award payment and salary cap

Future State
- Payroll Costing Allocations will reflect the true effort commitment on the grant worktag
- Workday will prorate the salary charges automatically as payroll runs

Salary Over the Cap Overview

Salary Over the Cap enables you to define salary cap for awards so that payroll expenses don't exceed sponsor salary over cap requirements:

Define the salary cap limits

Config

→

Assign to an award line

Award Setup

→

Assign alternate costing for the over the cap amount

Payroll Costing Allocation

→

Salary over and under the cap will be allocated using the appropriate costing after each payroll run

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Payroll Costing Allocation with Salary Over the Cap

Costing Allocation Details 2 items

	Program	Grant	Project	Gift	*Cost Center	*Fund	*Function	Additional Worktags	* Distribution Percent	Salary Over the Cap
		× GR000002938 UWMSN | FIRST Phase 2 - PEDS			× CC002656 UWMSN | SMPH | Pediatric Pulmonology	× FD0144 Federal Aid - Special Projects	× FN0400 Research		50	1
	× PG000011246 UWMSN | Engineering | Chemical Engineering - General				× CC004026 UWMSN | Engineering | Chemical Engineering	× FD0136 General Operations Receipts	× FN0200 Instruction		50	
									100.00%	

Grant Name   UWMSN | FIRST Phase 2 - PEDS

Award Line Start Date   09/01/2016

Award Line End Date   08/31/2025

Award Name   Early Childh Diet, Growth, Gut Microbiome and Lung He

Salary Over the Cap Type   NIH Level II Salary Cap

Cap Amount   221,900.00

Alternate Costing Suballocation for Salary Over the Cap

1 item

fault (As of Start Date)	Required with no Default (Must have Costing Override)	Costing Company	Program	Project	Gift	Cost Center	*Fund	*Function	Additional Worktags	* Distribution Percent
ompany: UWMSN University f Wisconsin Madison ocation: Health Sciences earning Center-1480			× PG000021711 UWMSN | SMPH | DFMCH Surveillance			× CC002574 UWMSN | SMPH | DFMCH Research-Grants	× FD0101 GPO - Doctoral Cluster	× FN0500 Public Service		100
										100.00%

Salary Over the Cap Calculation

FTE Salary: $240,000

Cap Amount: $221,900

Payroll Accounting Overview	
Step	**Payroll Amount**
Bi-Weekly Pay	9,230.77
Bi-Weekly Cap	8,534.62
Allowable % on DHHS Grant	92.46%
GFXXXXXXXXX (50%)	4,615.38
GRXXXXXXXXX (50%)	4,615.39
Bi-Weekly Under Cap	**4,267.38**
Bi-Weekly Over Cap	**348.01**

Costing Allocation		
Costing Worktags	**%**	**Amount**
GFXXXXXXXXX	50%	4,615.38
GRXXXXXXXXX	50%	4,267.38
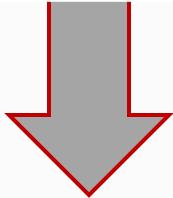
Salary Over the Cap Allocation		
Costing Worktags	**%**	**Amount**
PGXXXXXXXXX	100%	348.01

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Payroll Accounting with Salary Over the Cap

Salary Over the Cap Considerations

- If salary is adjusted via a Payroll Accounting Adjustment (PAA) for an employee that is over the cap, an Excel workbook would need to be used to calculate the allocation for the PAA

- NIH typically issues the new cap threshold after they are effective. Payroll Accounting Adjustments will be needed to adjust prior payroll to align with the effective salary cap threshold.

- If retro payments, promotions, demotions, or mid-pay period hires are processed for employees that are over the cap, a PAA is required to align with the effective salary cap threshold
  - Report development in progress to identify this population

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Salary Over the Cap Cutover Activities

- Identify over the cap Employees who have a DHHS grants on the payroll costing allocation

- Update Workday Payroll Costing Allocations for those employees to include the appropriate allocations and over the cap suballocation

  - If the allocations are not updated, salary over the cap will be accounted for twice

  - This process would need to be completed prior to the first payroll run in Workday

Workday Reporting

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Reporting Resources

WISER to Workday Crosswalk

↓ WISER Category	WISER Report Name	Purpose	Workday Report Name	Available in UXT Tenant?
Projects	Find Awards/Projects	Find awards and projects by a wide array of search criteria including award ID, project ID, fund, dept., investigator name, sponsor, etc. Display financial totals by project.	Find Awards, Award Search (UW) (2263), Budget to Actuals Report (UW) (2324), AR Subtab (View Sponsor Invoices for Award/ Award Open Accounts Receivable (UW) (2297)), Personnel Tab (New Report Request), Award Mods-Award History 2310 (Can look directly at the award history)), Requirements (See Award), Cost Share-No direct equivalent look at (Budget to Actuals 2324 & Find Payroll Costing Allocations), Documents (No equivalent in WD), RAMP/WISPER (No real equivalent in WD-will need to check RAMP)	Yes

Workday key reports for Sponsored Programs

Award Search (UW)(2263)
This report shows the complete portfolio of sponsored awards including award task information and can be filtered by Principal Investigator, Award/Grant Management Employee (Central Award Accountant, Grant Manager) and Sponsor

Award Budget to Actuals (UW) (2324)
Report will provide a snapshot of award and/or grant specific financial information by object class. Budget, actuals, encumbrances, remaining balance for sponsor expenses and cost share expenses

Awards with Cost Sharing (UW) (2265)
This report displays awards that have cost share grants associated with them

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Resources

- [Workday Resources](#) Explore a range of resources designed to prepare you for Workday training in March 2025, including key concepts, benefits, and high-level changes that will come with the new system.

- [What's Changing: Grants Management](#) – 6 minute video

- [Workday Terminology and Crosswalk](#)

- [FDM Crosswalk](#) (SFS Chart of Accounts to Workday FDM values)

- [Security Role Mapping Tableau Dashboard](#) (VPN required)

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