Budget Management and UW Financial Transformation – What to Expect

Spring Quarter Pre-Tenure Workshop
April 5, 2023
Speakers

- Ashleigh Theberge, Associate Professor of Chemistry
- Amanda McCracken-Roberts, College of Engineering Collaboration Core Administrator
Ashleigh Theberge
Associate Professor of Chemistry
SpendLab

> Spendlab.org
UW Finance Transformation (UWFT)

Amanda McCracken-Roberts
Administrator, College of Engineering Collaboration Core
One comprehensive, cloud-based, modern financial system is vital to support the University and promote responsible stewardship.
Before and After UW Financial Transformation (UWFT)

Currently / Before UWFT:

• Unit (dept) centric financial administration

• Old, large, enterprise systems
  • Ariba (procurement)
  • MyFD (accounting and reconciliation)

After UWFT:

• Shared services AND unit centric financial administration as needed

• New comprehensive, cloud-based system

Workday Financials
Levels of Shared: Define where work is done

> **Enterprise-wide** — processes that are shared across the entire UW, including UW Academy (UWA) and UW Medicine (UWM).

> **Organization-wide** — processes that are done on behalf of either UWA or UWM, but not across both organizations.

> **Shared Environment (SE)** — processes that can be done more efficiently, consistently and accurately in a shared environment by having a pooled set of resources performing on behalf of multiple local units.
  
  * **Central Shared Environment (CSE)** — located in central UW Finance Shared Services, the CSE is available to support units that require ‘outsourcing’ SE transactions due to small unit size, low transaction volumes or limited resources.

> **Unit Level** — processes that are unique or specific to an individual unit.
Key Changes: Procurement

Currently / Before FT:

**Ariba**: eProcurement system to manage ordering, purchasing & invoicing.

**Ariba**: payments to individuals, honorariums, etc.

After FT:

**GHX**: a cloud-based hosted and punch-out catalog that will integrate seamlessly with Workday (e.g., be accessible from within the Workday site)

**Workday Strategic Sourcing (WSS)**: All contracting and solicitation standardized at the org and enterprise-wide levels; Scoring of solicitations and signing of contracts will be automated and routed within WSS

**Workday**: place to process all payments
# Key Changes: Grant and Contract Management

<table>
<thead>
<tr>
<th>Currently / Before FT:</th>
<th>After FT:</th>
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<tbody>
<tr>
<td>Grant Tracker</td>
<td>Award Portal</td>
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<td>Effort Reporting Systems (eFECS, GCCRs)</td>
<td>Employee Compensation Compliance (ECC)</td>
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<td>Grant budgets and effort (manual, ad hoc systems)</td>
<td>Workday: will import budget and other award data directly from SAGE budget</td>
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<td>Cost share tracking (manual systems)</td>
<td><strong>Cost share tracking in real time</strong>, unique award line(s) will be established in the financial system to track cost share expenses instead of tagging after the fact</td>
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> Fiscal Activity Cut-off (May/June 2023)
  • Check with your individual units for their cutover plans

> April-July 2023
  • Self-paced eLearning (PI focused e-learning – 10 min videos)
  • Live End User Training
  • Practice labs

> July 1, 2023 Go-live!
  • User support will continue in July & August
WORKDAY TRAINING COURSES FOR FACULTY

UWA faculty will receive courses based on how they will interact with the Workday system.

For Faculty who are...

Principal Investigators...
- **Workday Finance Grants for Principal Investigators**
  Understand how to view, access, and read reports, and delegate tasks in Workday; understand ad-hoc subrecipient invoice approval task
  - Training Method: Nano-learning
  - Time length: 10 mins

Grant Managers...
- **Workday Finance for Awards and Grants**
  Will provide end-users with information on managing awards & grants in Workday.
  - Training Method: Nano-learning
  - Time length: 15 min

- **Workday Grant Management Reporting, Workday Grant Management Configuration and Workday Grant Management for Principal Investigators** (optional) covering the key tasks of managing grants in Workday.
  - Training Method: 3 Nano-Learning videos, 1 eLearning courses, Multiple Job Aids
  - Time length: 25 mins

Expense Report Submitters and/or Approvers...
- **Workday Grant Sponsor Invoicing**
  Understand the expense and reimbursement process in Workday; understand how to manage expense reports after submitting, including locating, editing, checking on approval flow and printing
  - Training Method: Recorded Demo (with job aids)
  - Time length: 40 mins

Requisition Submitters and/or Approvers...
- **Workday Requisitions**
  Understand the requisitions process in Workday and types of requisitions
  - Training Method: Recorded Demo (with job aids)
  - Time length: 10 mins

The Workday General courses, including Workday Navigation, Introduction to Foundational Data Model (FDM) and Workday Reporting, will be optional for Faculty.
Questions?