

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](https://spendlab.org)

UW Finance Transformation (UWFT)

Amanda McCracken-Roberts

Administrator, College of Engineering Collaboration Core



UW Finance Transformation (UWFT)

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: 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

Currently / Before FT:

Grant Tracker

Effort Reporting Systems
(eFECS, GCCRs)

Grant budgets and effort
(manual, ad hoc systems)

Cost share tracking
(manual systems)



After FT:

Award Portal

Employee Compensation Compliance (ECC)

Workday: will import budget and other award data directly from SAGE budget

Cost share tracking in real time, unique award line(s) will be established in the financial system to track cost share expenses instead of tagging after the fact



Timeline & Key Dates



- > **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...

Grant Managers...

Expense Report Submitters and/or Approvers...

Requisition Submitters and/or Approvers...

Course Description	Training Method	Time length
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	Nano-learning	10 mins
Workday Finance for Awards and Grants Will provide end-users with information on managing awards & grants in Workday.	Nano-learning	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.	3 Nano-Learning videos 1 eLearning courses Multiple Job Aids	25 mins 15 mins
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	Recorded Demo (with job aids)	40 mins
Workday Requisitions Understand the requisitions process in Workday and types of requisitions	Recorded Demo (with job aids)	10 mins

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

Questions?
