

OFFICE OF RESEARCH INFORMATION SERVICES
UNIVERSITY *of* WASHINGTON



WORKDAY & SAGE



SAGE BUDGET JOB AID

GETTING STARTED

WHAT IS WORKDAY

The University of Washington (UW) launched a new human resources and payroll system called Workday. Because the SAGE software system relies on UW human resources and payroll data, the Workday implementation impacts SAGE.

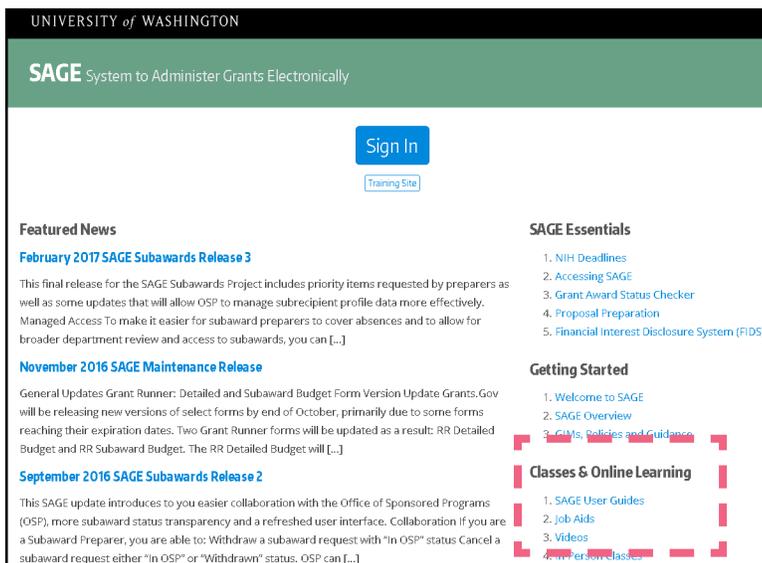
HOW TO USE THIS JOB AID

This job aid provides an overview of changes to SAGE Budget. Workday also impacts the Person Chooser throughout SAGE and the SAGE Approval Graph.

SAGE Person Chooser & SAGE Approval Graph changes are covered in more depth in the videos:

- Workday & SAGE: Changes to Person Chooser
- Workday & SAGE: Changes to the Approval Graph

Go to sage.washington.edu and select “videos” in the right-hand menu.



By following this job aid you will be able to:

- Define new concepts and terminology
- Add a person’s salary information to a budget
- Update or convert salary information in SAGE Budget
- Find more information about Workday and SAGE
- Know whom to contact for assistance

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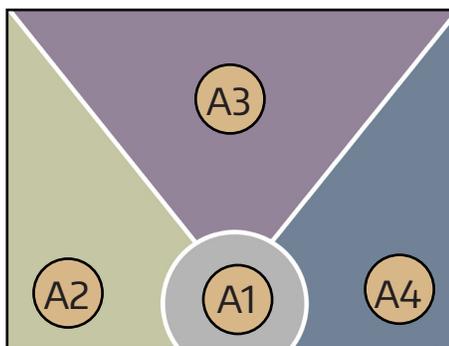
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POSITIONS & ACADEMIC APPOINTMENTS

Workday replaces functions previously handled by systems such as HEPPS, OPUS and PRIME and introduces new ways of describing appointments, positions and hierarchies. To help breakdown Positions and Academic Appointments, items are broken into “color zones” to help distinguish specific views and connecting lines to show the relationship.

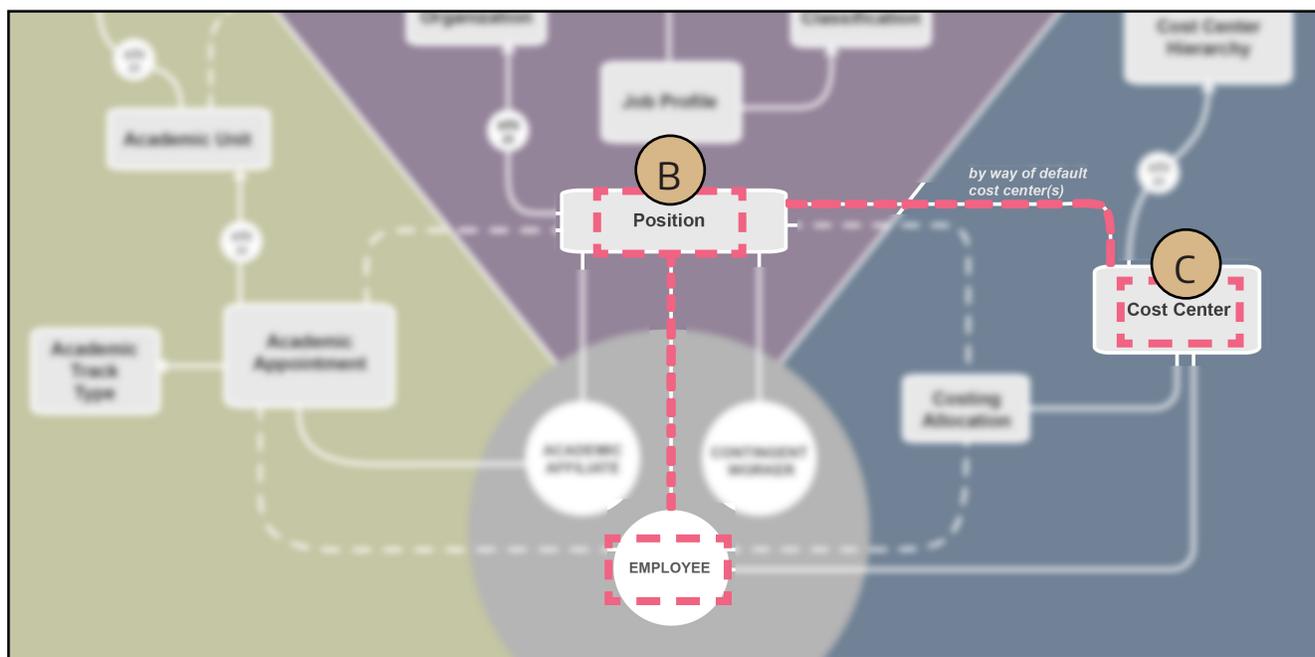
A. There are four distinct color zones:

- (A1) Worker
- (A2) Academic View
- (A3) HR View
- (A4) Financial View.

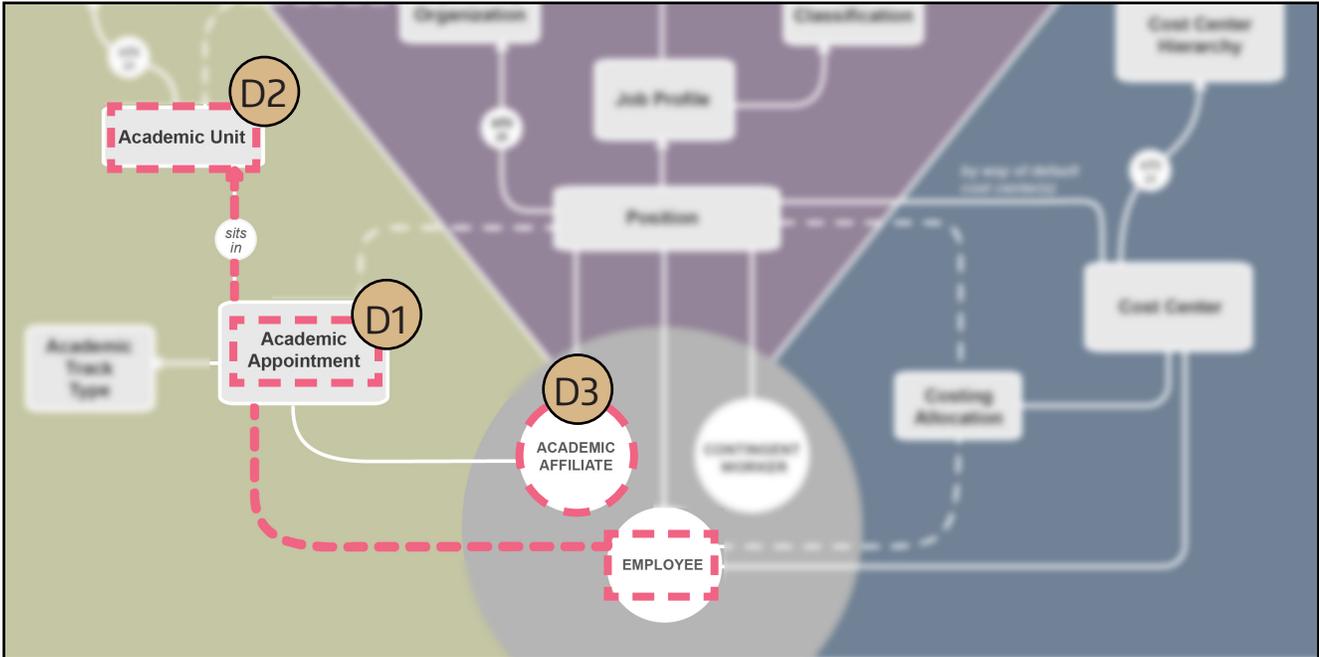


B. **Employees (A3)** such as Faculty, hold **Positions (A3)**. *Positions determine pay and benefits information which is why it is represented in the (A1) HR View.*

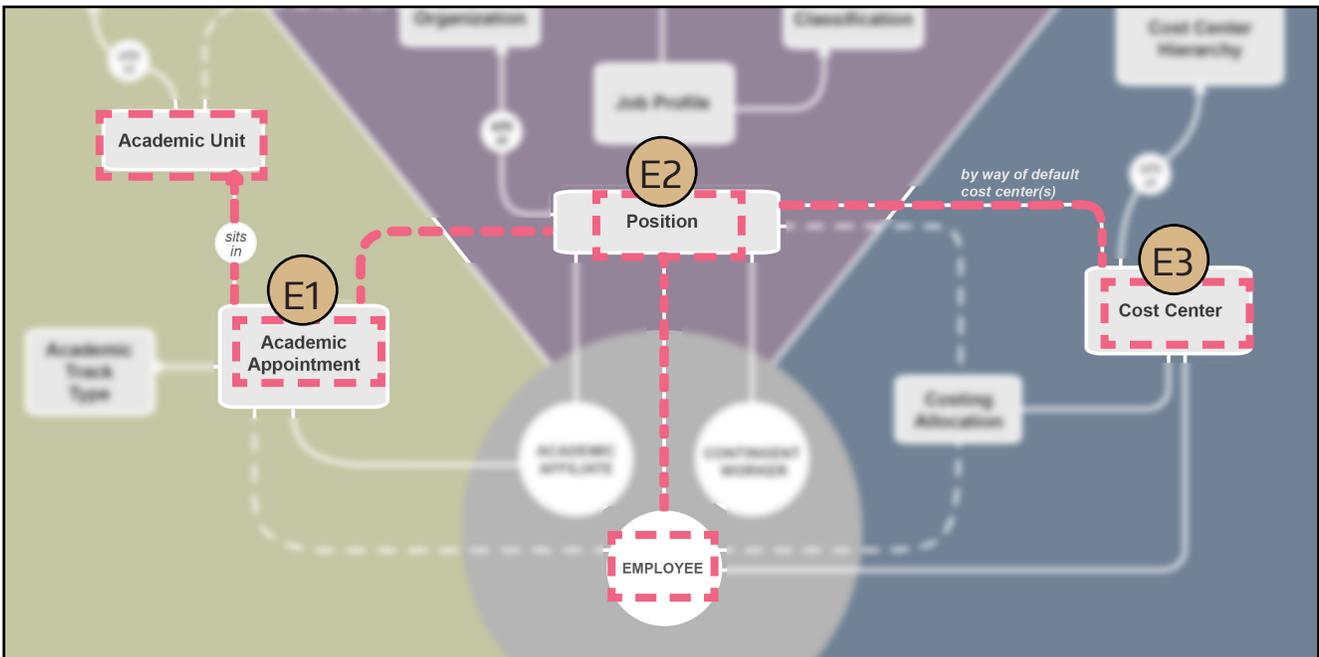
C. **Employees (A3)** hold **Positions (A3)** linked to **Cost Centers (A4)**. *Cost Centers are the same as Budget Numbers and are connected to Financial Organization Codes which is why it is represented in the (A4) Financial View.*



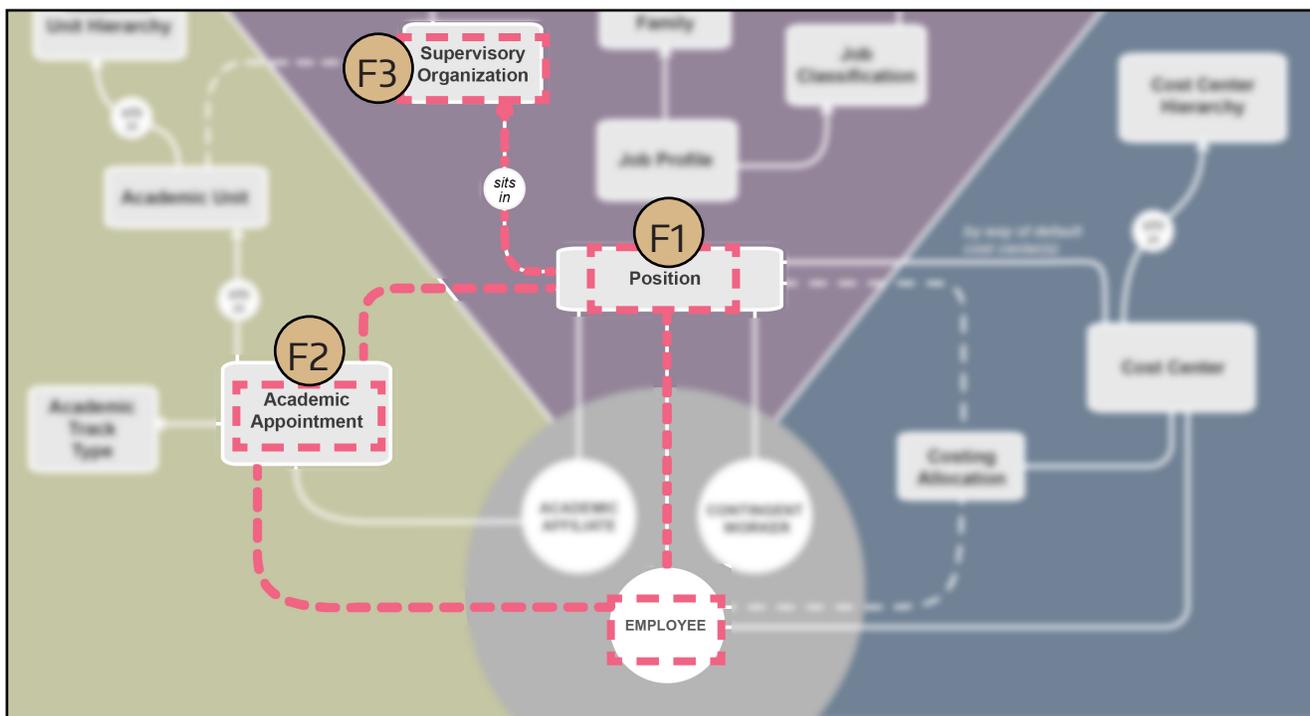
D. Some **Employees (A1)** such as Faculty, have one or more (D1) **Academic Appointments (A2)** associated with (D2) **Academic Units (A2)**. This includes (D3) **Academic Affiliates (A1)**.



E. An **Employee (A1)** who is a Faculty member, will have one or more (E1) **Academic Appointments (A2)** in **Academic Units (A2)** and at least one (E2) **Position (A3)** linked to a (E3) **Cost Center (A4)**.



F. **Employees (Zone A3)** who hold multiple (F1) **Positions (Zone A2)** or (F2) **Academic Appointments (Zone A2)** will have a designated (F1) **“Primary” Position (Zone A3)** and (F3) **“Primary” Organization Code (Zone A3)**.



EXCEPTIONS

UNPAID ACADEMIC APPOINTMENT: Search for Workday Changes at sage.washington.edu to learn more about exceptions like unpaid academic appointments.

OBJECT CODES, ORGANIZATION CODES & COST CENTERS

Workday uses the same Object Codes, Organization Codes and Budget Numbers you are familiar with. In some cases, however, there may be slight differences in presentation and terms used since Workday uses a different data model from the legacy system..

OBJECT CODES

In Workday, and therefore SAGE Budget, Object Codes for salaries are less granular than they were in the legacy system and include only the first digit of the sub-object code.

Title	Associate Professor
UW Sub-Object Code	(10) Instruction & Research Faculty

Someone whose position was previously associated with the sub-object code 11, Full Time Permanent Instruction & Research Faculty, will appear in SAGE Budget with the default object code of 10, Instruction & Research Faculty, which is less granular than sub-object code 11.

In the SAGE Budget salary and wages setup drop-down menu, however, you will still see the options for 11, 12, 13 and so on, and will be able to choose the more granular sub-object code for a position, if needed.

EXAMPLE: For example, an object code that was previously 01-22 appears as 01-20 in Workday, where the last digit of the sub-object code is a zero for all 01-2x object codes.

Title	Associate Professor
UW Sub-Object Code	(10) Instruction & Research Faculty
Benefit Exemptions	(00) MISC
nt Campus Benefit Rate	(10) Instruction & Research Faculty
	(11) Full-Time Permanent Instruction & Research Faculty
	(12) Part-Time Permanent Instruction & Research Faculty
	(13) Full-Time Temporary Instruction & Research Faculty
	(14) Part-Time Temporary Instruction & Research Faculty
ort	(20) Auxiliary Teaching Staff
	(21) Full-Time Permanent Auxiliary Teaching Staff
	(22) Part-Time Permanent Auxiliary Teaching Staff
Worker Position Type	(23) Full-Time Temporary Auxiliary Teaching Staff
	(24) Part-Time Temporary Auxiliary Teaching Staff
Project Role	(30) Graduate School Student Appointments--Teaching
% Effort	(33) Full-Time Graduate School Student Appointments--Teaching

TIP: If your sponsor requires a more detailed description and sub-object code for a position, choose a sub-object code from this drop-down.

ORGANIZATION CODES

Financial Organization Codes in Workday are the same as those used in the UW's financial systems.

COST CENTERS

Cost Center is the term used in Workday to describe the financial system Budget Number. The Budget Numbers themselves are remaining the same.

Salary, Wages, and Stipends

Date Retrieved 7/6/2017
UW Monthly Salary \$9,209
Clinical Monthly Salary \$0
 Clinical salary information is provided for re

	PositionID	Obj-SubObject	Cost Center	Organization	Position Title
<input checked="" type="checkbox"/>	PN-0000965	01-10	SQ-COMP HIST OF IDEAS(191320)	SQ-COMP HISTORY IDEAS(2800254030)	Associate Professor

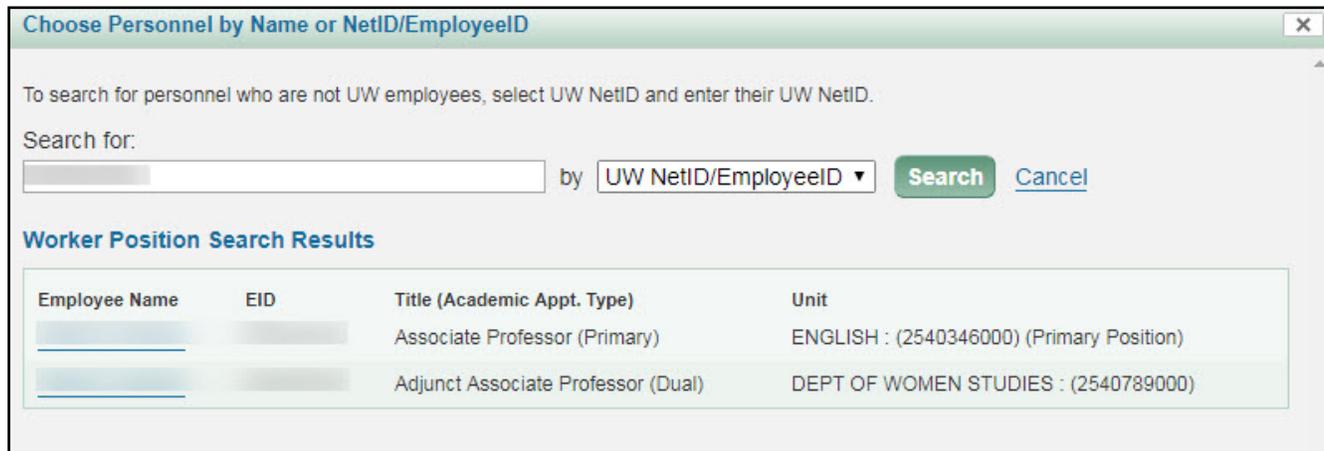
To include other earnings, add the appropriate amount to the starting salary below.

EARN CODES & EARN TYPES

Earn Code is the Workday term for Earn Type. In most cases, you will no longer need to use Earn Types to describe planned distribution in SAGE Budget; less granular pay types are used in Workday, such as Base Pay and Allowance, are used.

SAGE BUDGET PERSON CHOOSER

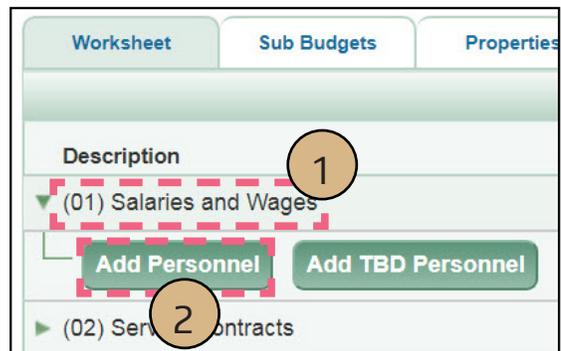
The SAGE Budget Person Chooser is the pop-up window that allows you to search for and add individuals to a budget in SAGE. You will see several changes to the new version of the Person Chooser.



Follow these steps on how to add a person to a budget who currently works for the University.

1. From the Budget Worksheet, select Salaries and Wages
2. Select the "Add Personnel" button.
3. Type in the name of the person you would like to search for
4. Select "Search".

The results display data fields you are familiar with, along with new key attributes to help you determine which result to choose.



Worker Position Search Results

A Employee Name
 B EID
 C Title (Academic Appt. Type)
 Associate Professor (Primary)
 Adjunct Associate Professor (Dual)
 D Unit
 ENGLISH : (2540346000) (Primary)
 E DEPT OF WOMEN STUDIES : (2540789000)

Item:	Field	Description
A	Employee Name	Displays the person's legal name
B	Employee Identification Number	Also known as EID
C	Title followed by Academic Appointment Type	Displays the academic or position title. If a person has an academic appointment, the type of academic appointment (such as Dual) will be indicated in parentheses after the title.
D	Unit followed by Organization Code	Displays the name and financial organization code of the unit associated with the position or academic appointment. The Unit field also indicates which line is the primary unit, associated with the person's primary position. "Primary Position" replaces the "home department" designation in the SAGE Person Chooser.
E	Organization Code	<ul style="list-style-type: none"> For a paid position, the organization code for the position will display. For an Academic Appointment linked to a paid position, the organization code of the linked paid position will display. For an unpaid academic appointment that is not linked to a position, the organization code that displays is derived from the supervisory organization.

5. Select the name of the person you would like to add to the budget.

Employee Name	EID	Title (Academic Appt. Type)	Unit
[Redacted]	[Redacted]	Associate Professor (Primary)	ENGLISH : (2540346000) (Primary Position)
[Redacted]	[Redacted]	Adjunct Associate Professor (Dual)	DEPT OF WOMEN STUDIES : (2540789000)

The Budget Line Setup will display. On this screen you can set general attributes for the budget item.

Best Research | B25876

Setup: [Redacted], Associate Professor ([Redacted])

Primary Position Type & Fringe Benefit Rate

Name: [Redacted]
Title: Associate Professor
UW Sub-Object Code: (10) Instruction & Research Faculty
Benefit Exemptions: None
Current Campus Benefit Rate: 24.90%

Project Role And Effort

Worker Position Type: Calendar Academic/Summer
Project Role: Other
% Effort: 0.00%

PRIMARY POSITION TYPE & FRINGE BENEFIT RATE

The first section is Primary Position Type and Fringe Benefit Rate. The default position listed is the person's Primary Position. You can select a more granular sub-object code to describe the position if needed.

Name: [Redacted]
Title: Associate Professor
UW Sub-Object Code: (10) Instruction & Research Faculty
Benefit Exemptions: None
Current Campus Benefit Rate: 24.90%

PROJECT ROLE & EFFORT

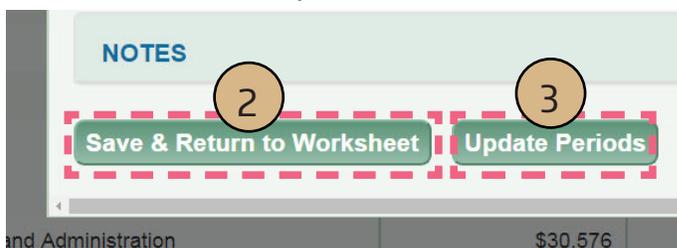
The Project Role and Effort section is unchanged.

SALARY, WAGES & STIPENDS

PositionID	Obj-SubObject	Cost Center	Organization	Position Title	Pay Type	Unallocated Rate	Distribution %	FTE Rate
PN-0000965	01-10	SQ-COMP HIST OF IDEAS(191320)	SQ-COMP HISTORY IDEAS(2800254030)	Associate Professor	BASEPAY (General Salary Plan)	\$9,209 (Monthly)	100.00%	\$9,209

The Salary, Wages and Stipends section has been revised. Follow these steps on updating each section:

1. "Starting Monthly Salary": Select or deselect compensation to include in the "Starting Monthly Salary" total.
2. Select "Update Period" or "Save & Return to Worksheet" in the lower left of the window.
3. To set values for individual periods of the budget:
 - Select "Update Period" or,
 - From the budget worksheet, select the salary amount listed in the column for the period of interest.



You will now see the new, multi-period entry screen. It gives you the ability to enter values for the period you selected and all subsequent periods. On this screen you can set percent effort, adjust monthly salary, set inflation rates and see or update totals for salary and benefits.

	Period 1 07/01/18 To 06/30/19	Period 2 07/01/19 To 06/30/20	Period 3 07/01/20 To 06/30/21	Summary(\$)
Effort				
Months	12.0000	12.0000	12.0000	
% Effort	0.00%	0.00%	0.00%	
Person Months	0.0000	0.0000	0.0000	
Salary				
Monthly Base Salary	\$10,000	\$10,000	\$10,000	
Update Salary <small>Updates this person's salary information for this period, and any future periods, with current values.</small>	Update Salary	Update Salary	Update Salary	
Increases				
Salary Inflation Rate (%)	2.00%	2.00%	2.00%	
Monthly Increase Amount	\$319	\$326	\$332	
Salary Totals				

- When finished, select "Return to Worksheet." Your budget should now reflect the values you entered.



BENEFIT EXEMPTION

If you need to add professional staff to a budget, you will see a warning message to check the benefit exemption status. Professional staff will default to a benefit exemption status of "None". If benefits should be exempted, you will need to manually change the benefit exempt status.



ADD TBD PERSONNEL TO A BUDGET

The process of adding a to-be-determined person to a budget is unchanged.

- Enter the name.
 - If you know the name of the person you will be hiring: Enter the name.
 - If you have not yet identified the person, you can leave the default "TBD" in the Name field.
- Enter a title for the position and select a sub-object code from the drop-down menu.

Setup: TBD

Primary Position Type & Fringe Benefit Rate ?

Name: TBD (1)

Title: Assistant Professor

UW Sub-Object Code: (11) Full-Time Perma (2) Instruction & Research Faculty

Benefit Exemptions: None

- Complete the additional fields, including starting monthly salary.
- Select "Update Period" to add percent effort for each period of the budget.

Salary, Wages, and Stipends

Date Retrieved	7/6/2017
UW Monthly Salary	\$0
Clinical Monthly Salary	\$0

Clinical salary information is provided for relevant faculty.

Please enter monthly salary below if known.

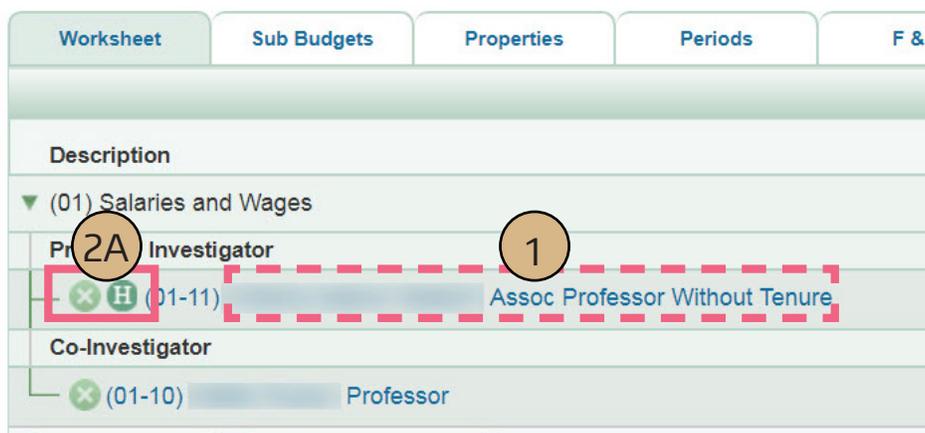
Starting Monthly Salary: \$5,000 (3)

NOTES

Save & Return to Worksheet Update Periods (4)

CONVERT OR UPDATE SALARY INFORMATION

If you need to refresh salary information in SAGE, such as to reflect increases or so that all salary information is based on Workday data, you can do so via either a conversion or an update. To convert or update salary information, follow the steps below:



CONVERT SALARY INFORMATION

1. Select the line item for the existing salary entry.
2. If the original salary information came from HEPPS, an (2A)"H" icon displays and a (2B) "Convert" link will appear.

HEPPS DATA

"H" INDICATOR: If you see an "H" indicator next to the line item on your budget worksheet, the salary information was selected before the launch of Workday and is based on data from HEPPS. These items will need to be converted to Workday data in order to update them. If there is no "H" indicator, the salary information came from Workday or was already converted.



TIP: The conversion process removes all HEPPS lines, and re-adds the person's latest salary lines from Workday.

The salary has been updated with the latest info from Workday.

UPDATE SALARY INFORMATION

If the original salary information came from Workday or the information has already been converted, there will be an "Update Salary" link. This action will update existing earning distributions, but will not add any new earnings to the budget.

PositionID	Obj-SubObject	Cost Center	Organization	Position Title	Pay Type	Unallocated Rate	Distribution %	FTE Rate
<input checked="" type="checkbox"/> PN-0000305	01-10	THAPS GENETICS(636991)	OCEANOGRAPHY(2630002000)	Professor	BASEPAY (General Salary Plan)	\$15,974 (Monthly)	17.10%	\$2,731
<input checked="" type="checkbox"/> PN-0000305	01-10	HESC-CORE B(611525)	COMPUTER SCIENCE & ENG(2600008000)	Professor	BASEPAY (General Salary Plan)	\$15,974 (Monthly)	82.90%	\$13,243

To include other earnings, add the appropriate amount to the starting salary below.

[Update Salary](#)
Updates this person's salary for all periods with the latest information from Workday; any new earnings that are not currently displayed will not be included in updated figure.

Starting Monthly Salary

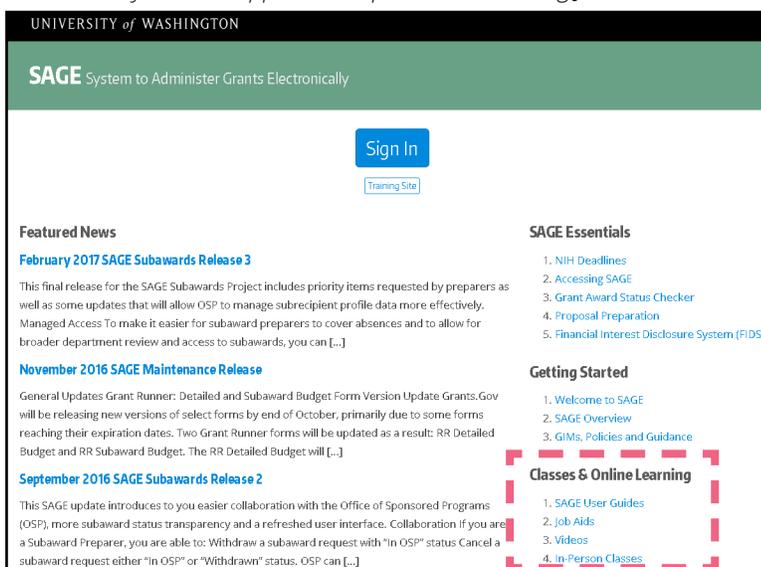
The salary has been updated with the latest info from Workday.

RESOURCES

VIDEOS & JOB AIDS

For more information on how Workday affects the Person Chooser in other SAGE applications or the SAGE Approval Graph, please view the companion resources available at sage.washington.edu under “videos” and “job aids”:

- *Workday & SAGE: Changes to the Person Chooser*
- *Workday & SAGE: Changes to the Approval Graph*
- *Workday & SAGE: Approval Graph Troubleshooting Job Aid*



OTHER QUESTIONS

SAGE USERGUIDES

washington.edu/research/tools/sage/support

SAGE CUSTOMER SUPPORT:

sagehelp@uw.edu

(206) 685.8335

INTEGRATED SERVICE CENTER (ISC)

isc.uw.edu