

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.

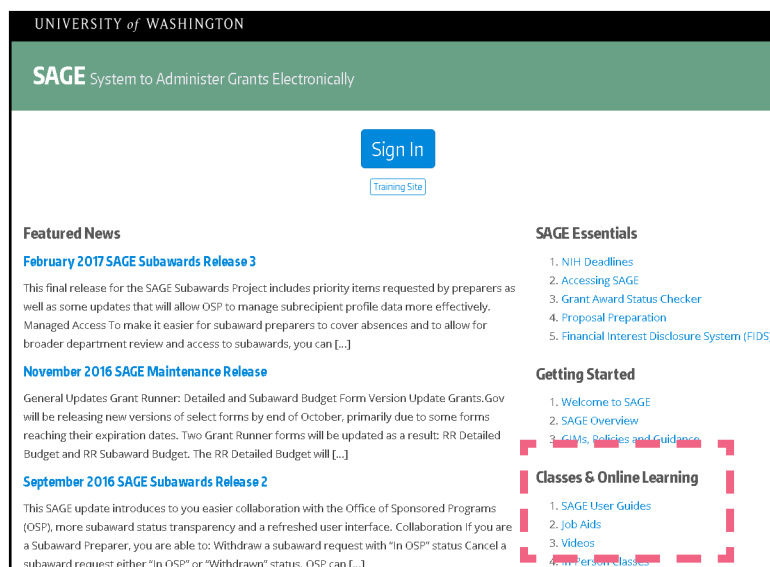
HOW TO USE THIS JOB AID

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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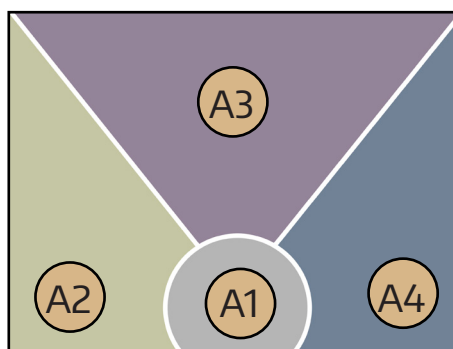
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POSITIONS & ACADEMIC APPOINTMENTS

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.

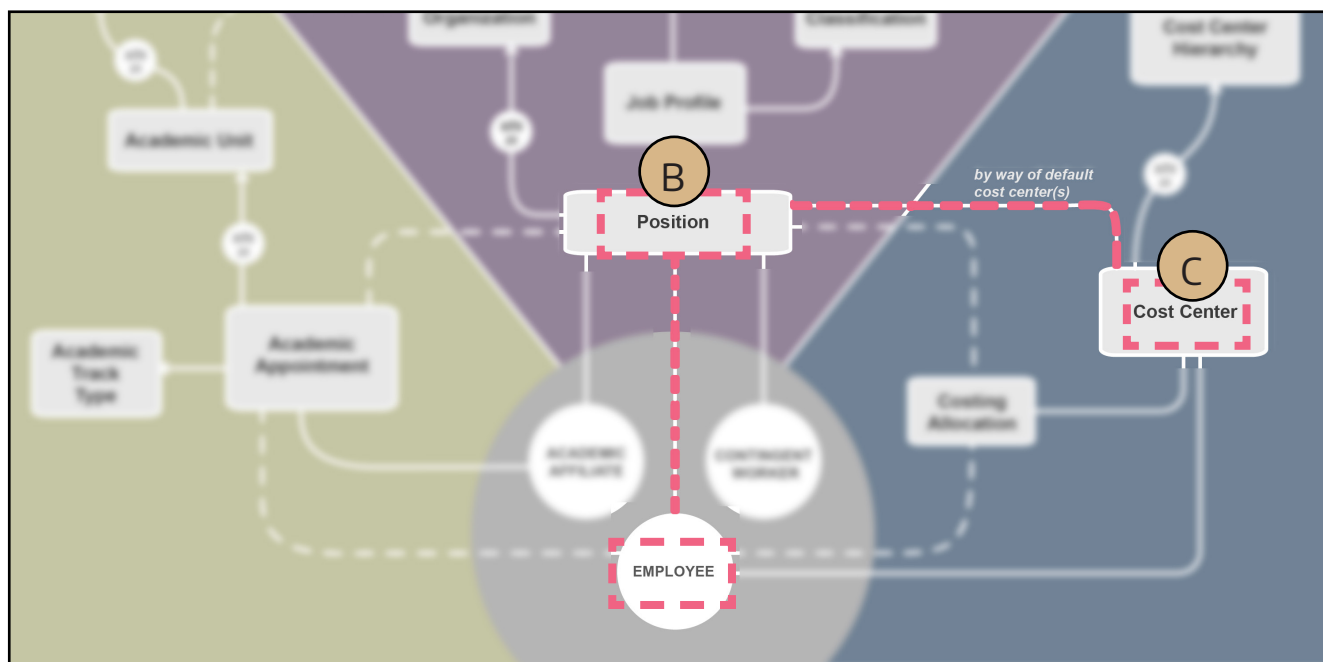
A. There are four distinct color zones:

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

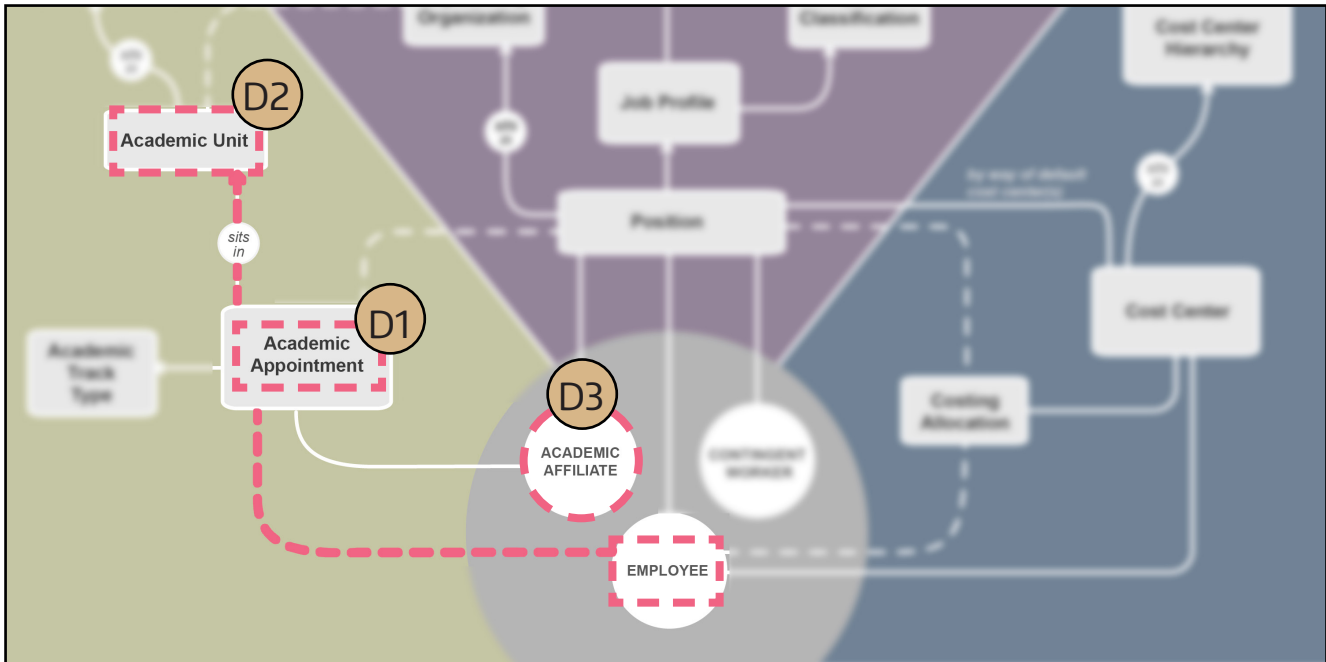


B. **Employees (A3)** such as Faculty, hold **Positions (A3)**. *Positions determine pay and benefits information which is why it is represented in the (A1) HR View.*

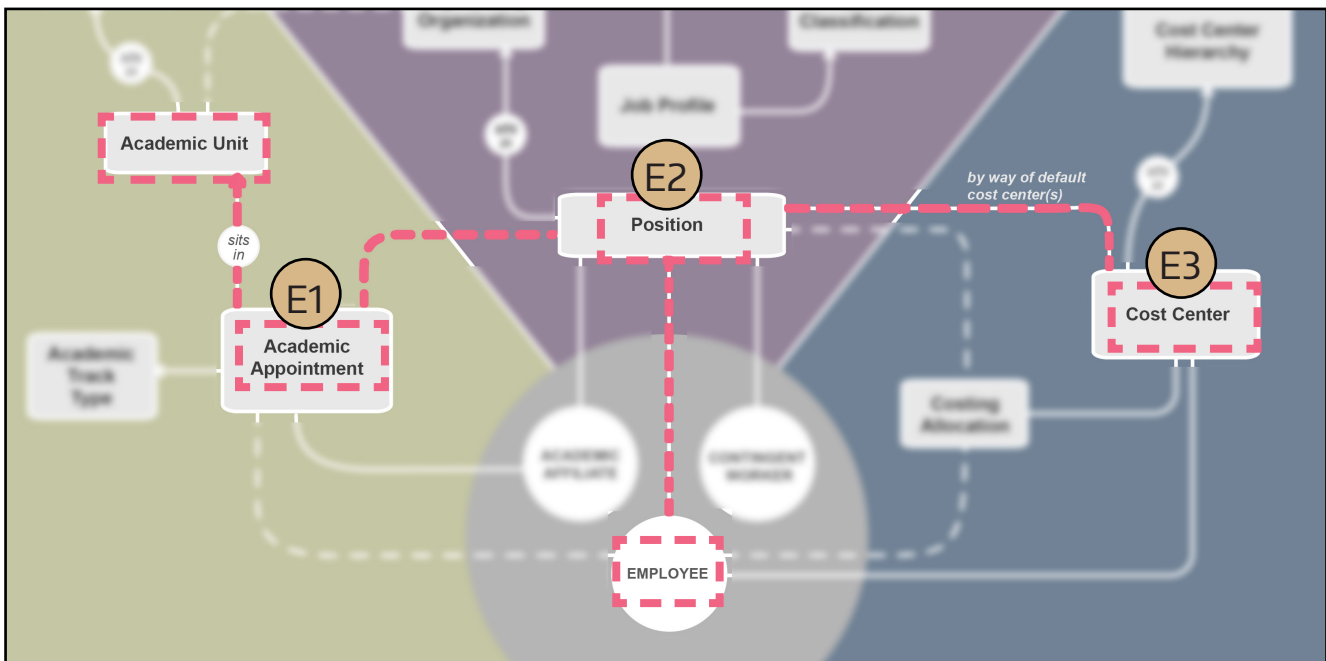
C. **Employees (A3)** hold **Positions (A3)** linked to **Cost Centers (A4)**. *Cost Centers are the same as Budget Numbers and are connected to Financial Organization Codes which is why it is represented in the (A4) Financial View.*



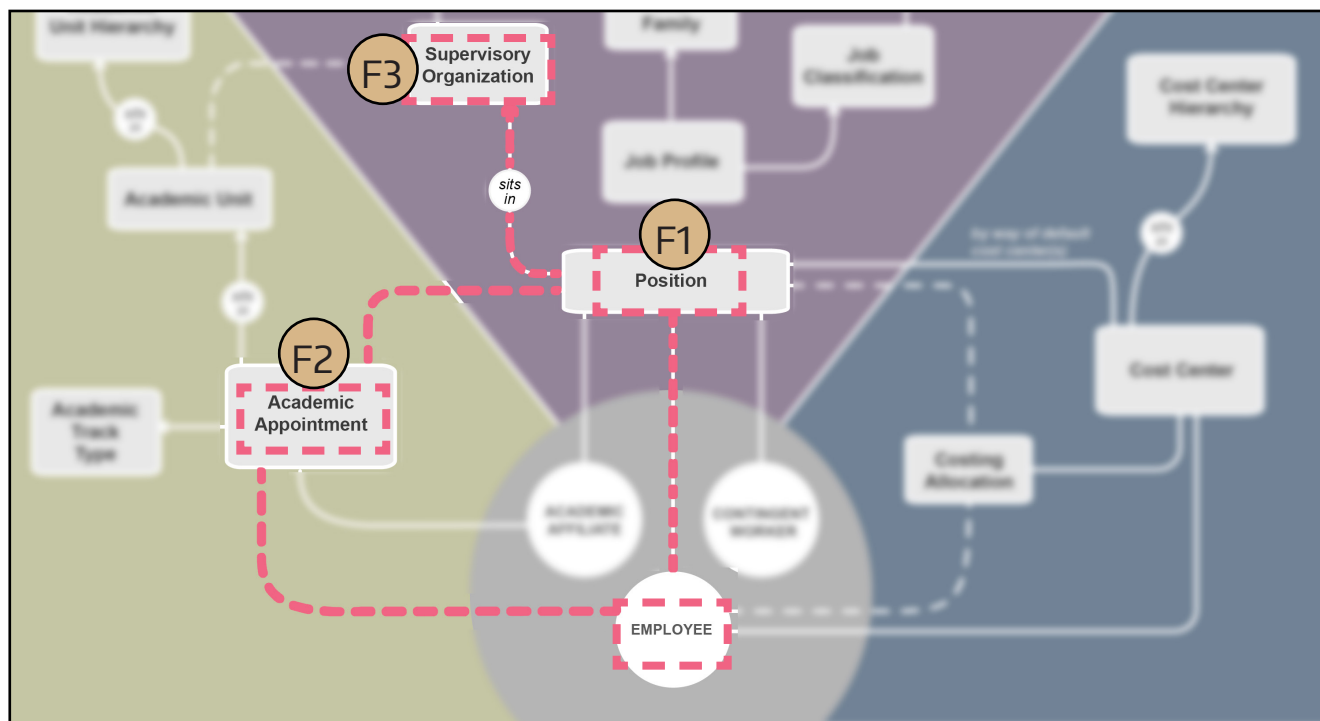
- D. Some **Employees (A1)** such as Faculty, have one or more (D1) **Academic Appointments (A2)** associated with (D2) **Academic Units (A2)**. This includes (D3) **Academic Affiliates (A1)**.



- 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
	(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 n

	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.

Choose Personnel by Name or NetID/EmployeeID

To search for personnel who are not UW employees, select UW NetID and enter their UW NetID.

Search for: by UW NetID/EmployeeID ▼ Search Cancel

Worker Position Search Results

Employee Name	EID	Title (Academic Appt. Type)	Unit
<input type="text"/>	<input type="text"/>	Associate Professor (Primary)	ENGLISH : (2540346000) (Primary Position)
<input type="text"/>	<input type="text"/>	Adjunct Associate Professor (Dual)	DEPT OF WOMEN STUDIES : (2540789000)

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.

Worksheet **Sub Budgets** **Properties**

Description
▼ (01) Salaries and Wages
▶ (02) Service Contracts

Add Personnel Add TBD Personnel

Choose Personnel by Name or NetID/EmployeeID

To search for personnel who are not UW employees, select UW NetID and enter their UW NetID.

Search for: by UW NetID/EmployeeID ▼ Search Cancel

Worker Position Search Results

A

B

C

D

E

Employee Name

EID

Title (Academic Appt. Type)

Unit

ENGLISH : (2540346000) (Primary Position)

DEPT OF WOMEN STUDIES : (2540789000)

Associate Professor (Primary)

Adjunct Associate Professor (Dual)

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.

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

Choose Personnel by Name or NetID/EmployeeID

To search for personnel who are not UW employees, select UW NetID and enter their UW NetID.

Search for: by **UW NetID/EmployeeID** **Search** [Cancel](#)

Worker Position Search Results

Employee Name	EID	Title (Academic Appt. Type)	Unit
[Red dashed box]		Associate Professor (Primary)	ENGLISH : (2540346000) (Primary Position)
		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: , Associate Professor ()

Primary Position Type & Fringe Benefit Rate

Name

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

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

Best Research | B25876

Salary, Wages, and Stipends

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

PositionID	Obj-SubObject	Cost Center	Organization	Position Title	Pay Type	Unallocated Rate	Distribution %	FTE Rate
1 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

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

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.

NOTES

2 Save & Return to Worksheet 3 Update Periods

and Administration \$30,576

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.

h | B25876

Sub Budget

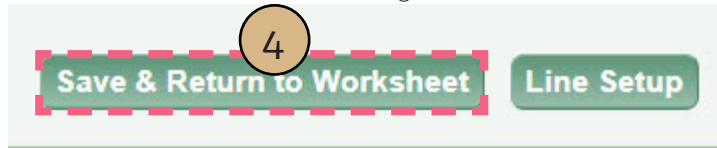
Professor

	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 Updates this person's salary information for this period, and any future periods, with current values.	Update Salary	Update Salary	Update Salary	
Increases				
Salary Inflation Rate (%)	2.00%	2.00%	2.00%	
Monthly Increase Amount	\$319	\$326	\$332	
Salary Totals				

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- 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.

Please verify that the Benefit Exemption value is correct.

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 (2)

UW Sub-Object Code: (11) Full-Time Permanent 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.

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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.

The screenshot shows a web application window titled "Best Research | B25878". It contains a table with the following columns: PositionID, Obj-SubObject, Cost Center, Organization, Position Title, Pay Type, Unallocated Rate, Distribution %, and FTE Rate. There are two rows of data, both for "Professor" positions. The first row has a "THAPS GENETICS(636991)" cost center and an "OCEANOGRAPHY(2630002000)" organization, with an unallocated rate of \$15,974 (Monthly) and a distribution of 17.10%. The second row has a "HESC-CORE B(611525)" cost center and a "COMPUTER SCIENCE & ENG(2600008000)" organization, with an unallocated rate of \$15,974 (Monthly) and a distribution of 82.90%. Below the table, there is a text prompt: "To include other earnings, add the appropriate amount to the starting salary below." followed by a red dashed box around an "Update Salary" link. Below the link is a description: "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." At the bottom, there is a "Starting Monthly Salary" label and a text input field containing "\$10,000". A red dashed arrow points from the "Update Salary" link to a green box at the bottom right containing the text: "The salary has been updated with the latest info from Workday."

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*

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SAGE System to Administer Grants Electronically

[Sign In](#)

[Training Site](#)

Featured News

February 2017 SAGE Subawards Release 3

This final release for the SAGE Subawards Project includes priority items requested by preparers as well as some updates that will allow OSP to manage subrecipient profile data more effectively. Managed Access To make it easier for subaward preparers to cover absences and to allow for broader department review and access to subawards, you can [...]

November 2016 SAGE Maintenance Release

General Updates Grant Runner: Detailed and Subaward Budget Form Version Update Grants.Gov will be releasing new versions of select forms by end of October, primarily due to some forms reaching their expiration dates. Two Grant Runner forms will be updated as a result: RR Detailed Budget and RR Subaward Budget. The RR Detailed Budget will [...]

September 2016 SAGE Subawards Release 2

This SAGE update introduces to you easier collaboration with the Office of Sponsored Programs (OSP), more subaward status transparency and a refreshed user interface. Collaboration If you are a Subaward Preparer, you are able to: Withdraw a subaward request with "In OSP" status Cancel a subaward request either "In OSP" or "Withdrawn" status. OSP can [...]

SAGE Essentials

1. NIH Deadlines
2. Accessing SAGE
3. Grant Award Status Checker
4. Proposal Preparation
5. Financial Interest Disclosure System (FIDS)

Getting Started

1. Welcome to SAGE
2. SAGE Overview
3. GIMs, Policies and Guidance

Classes & Online Learning

1. SAGE User Guides
2. Job Aids
3. Videos
4. In-Person Classes

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