



Overview

The following guide will walk users through the process of 1) reviewing and updating existing departmental Grant Hierarchies and 2) requesting new departmental Grant Hierarchies.

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Reviewing Departmental Grant Hierarchies

The [Workday Grant Hierarchy Roles report](#) contains a listing of every Departmental hierarchy organized by [cost center](#). The report can be used to review the [Workday Finance Security Roles](#) assigned to a hierarchy. Users can search by cost center or the Grant Hierarchy number itself to view the named Grant Manager(s), Financial Analyst(s), and Certifier(s).



Departmental Administrators should review the report regularly to ensure departmental Workday Finance Security roles are filled appropriately. Roles should not be left blank and should be updated quickly when staffing changes occur, as missing roles can result in a lack of compliance.

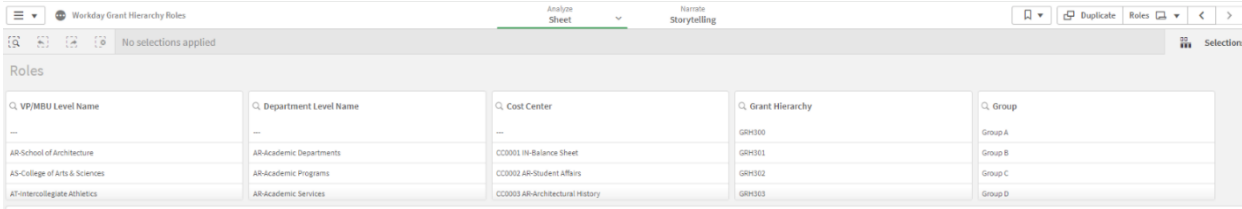
Full descriptions and required training for all Finance Security Roles can be viewed [here](#) on the UVA Finance Website.

Departmental Security Roles assigned to Grants are briefly described in this [Grants Management Training presentation](#), starting on page 9.

In-depth descriptions of Workday Grant Roles and their typical duties and responsibilities can be found in [this training presentation](#) put together by UVA Finance and UVA OSP Post Award.

The top section of the report contains search fields (Image 1). Click the magnifying glass by any title to open the search textbox (Image 2).

Reviewing, Updating, and Requesting Grant Hierarchies



The screenshot shows the 'Workday Grant Hierarchy Roles' interface. At the top, there are tabs for 'Analyze Sheet' and 'Narrate Storytelling'. Below the tabs, there are search fields for 'VP/MBU Level Name', 'Department Level Name', 'Cost Center', 'Grant Hierarchy', and 'Group'. The 'Cost Center' field is highlighted with a yellow box.

VP/MBU Level Name	Department Level Name	Cost Center	Grant Hierarchy	Group
---	---	---	GRH100	Group A
AR-School of Architecture	AR-Academic Departments	CC0001 IN-Balance Sheet	GRH101	Group B
AS-College of Arts & Sciences	AR-Academic Programs	CC0002 AR-Student Affairs	GRH102	Group C
AT-Intercollegiate Athletics	AR-Academic Services	CC0003 AR-Architectural History	GRH103	Group D

Image 1: Search Fields

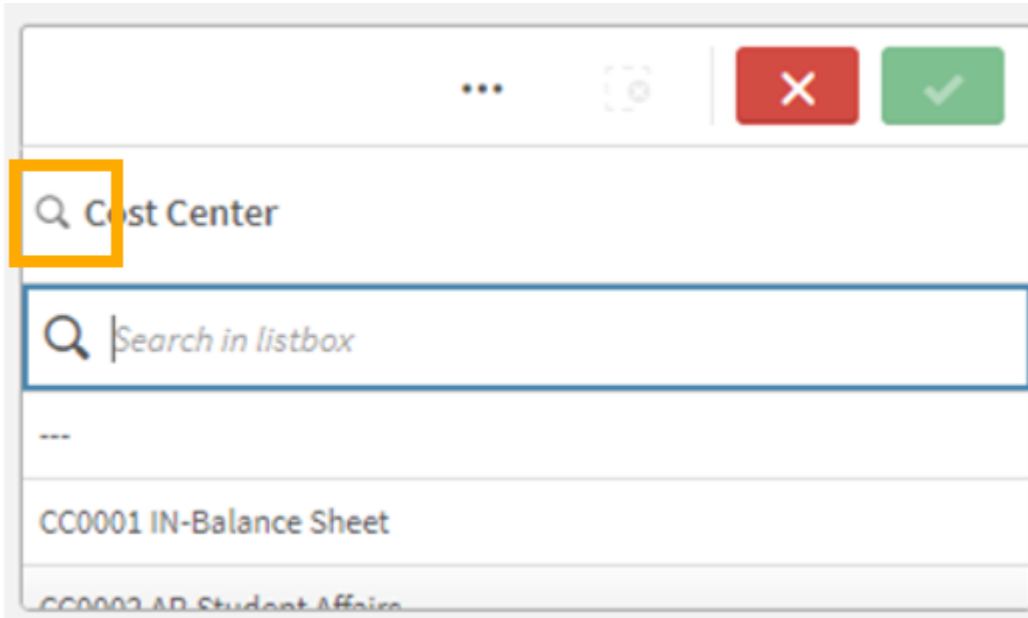


Image 2: Search Textbox

To select a cost center, click on the item itself and the green checkbox (Image 3).

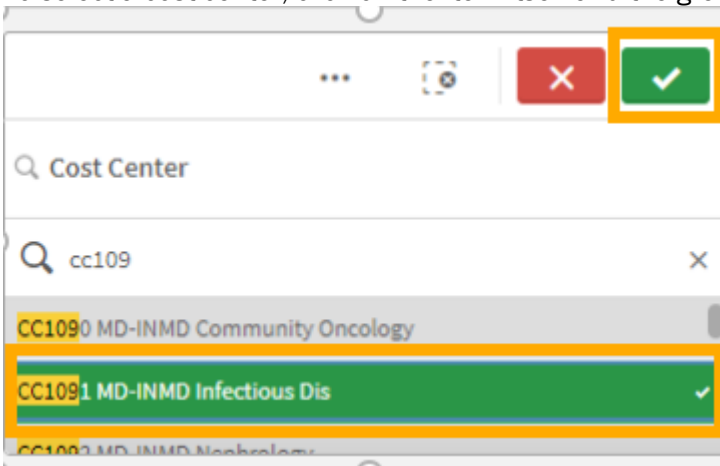


Image 3: Selections


Your selection(s) will remain highlighted in green and show up on the top left of the report. A selection can be removed with the X (Image 4).

Reviewing, Updating, and Requesting Grant Hierarchies

Grant Hierarchy ID	Grant Hierarchy by Name	Group	Group Identifier	Plus Certifier? Y/N	F&A Revenue Allocation Profile
GRH124	CC1091-A MD-INMD Infectious Dis	Group A	Pts Mathers, Coblen, Kosak, Jackson	Y	F&A: MD-SOM INMD & OTHER CLINICAL
GRH127	CC1091-RW MD-INMD Infectious Dis (RYAN WHITE)	Ryan White awards	Ryan White awards	Y	F&A: MD-SOM INMD & OTHER CLINICAL
GRH125	CC1091-B MD-INMD Infectious Dis (GROUP B)	Group B	Pts Petri, Gaboriet, Abhyankar	Y	F&A: MD-SOM INMD & OTHER CLINICAL
GRH129	CC1091-E MD-INMD Infectious Dis (GROUP E)	Group E	Pts Houpt, Platta-Mills, Tereuchi, Hayashi, Ramakrishnan	Y	F&A: MD-SOM INMD & OTHER CLINICAL
GRH400	CC1091-F MD-INMD Infectious Dis (GROUP F)	Group F	Pts Moore, Warren, Shin, Molinaro, Hughes	Y	F&A: MD-SOM INMD & OTHER CLINICAL
GRH401	CC1091-G MD-INMD Infectious Dis (GROUP G)	Group G	Pts Marie, Madden, Burgess, Thomas, Saaman	Y	F&A: MD-SOM INMD & OTHER CLINICAL
GRH406	CC1091-D MD-INMD Infectious Dis (GROUP D)	Group D	Pts Sun, Taylor	Y	F&A: MD-SOM INMD & OTHER CLINICAL

Image 4: Navigation of Selections

The center box of the report contains additional information used for award setup purposes, such as the Revenue Allocation Profile and Pre-/Post-Award Hierarchies. This section will also indicate if a cost center has more than one hierarchy, in the Group column. An N/A will be shown under Group if the cost center only has one hierarchy.



Some schools and departments have created more than one hierarchy for a cost center. For cost centers with multiple hierarchies, use the **Group Identifier column** to narrow down to a single hierarchy. The hierarchy can be clicked on directly in the Identifying Information section (Image 5). Click on the hierarchy and green checkbox to make your selection and remove all other options from the screen (Image 6).

Grant Hierarchy ID	Grant Hierarchy by Name	Group	Group Identifier	Plus Certifier? Y/N	F&A Revenue Allocation Profile
GRH124	CC1091-A MD-INMD Infectious Dis	Group A	Pts Mathers, Coblen, Kosak, Jackson	Y	F&A: MD-SOM IN
GRH127	CC1091-RW MD-INMD Infectious Dis (RYAN WHITE)	Ryan White awards	Ryan White awards	Y	F&A: MD-SOM IN
GRH125	CC1091-B MD-INMD Infectious Dis (GROUP B)	Group B	Pts Petri, Gaboriet, Abhyankar	Y	F&A: MD-SOM IN
GRH129	CC1091-E MD-INMD Infectious Dis (GROUP E)	Group E	Pts Houpt, Platta-Mills, Tereuchi, Hayashi, Ramakrishnan	Y	F&A: MD-SOM IN
GRH400	CC1091-F MD-INMD Infectious Dis (GROUP F)	Group F	Pts Moore, Warren, Shin, Molinaro, Hughes	Y	F&A: MD-SOM IN
GRH401	CC1091-G MD-INMD Infectious Dis (GROUP G)	Group G	Pts Marie, Madden, Burgess, Thomas, Saaman	Y	F&A: MD-SOM IN
GRH406	CC1091-D MD-INMD Infectious Dis (GROUP D)	Group D	Pts Sun, Taylor	Y	F&A: MD-SOM IN

Image 5: Multiple Hierarchies per Cost Center

Reviewing, Updating, and Requesting Grant Hierarchies

Identifying Information							
Grant Hierarchy ID	Grant Hierarchy by Name	Group	Group Identifier	Plan Certifier? Y/N	F&A Revenue Allocation Profile	Pre-Award Hierarchy	Award Analyst and Post-Award Hierarchy
GR1039	CC1001-E MD-IBMD Infectious Dis (GROUP E)	Group E	Pls Houst, Platts Mills, Tarouchi, HayesL, ReinholdShan	Y	F&A: MD-SOM IBMD & OTHER CLINICAL	Sam_1	Sutton, Tammy (bnstc)

Grant Manager		Grant Financial Analyst		Grant Account Certifier				
Cost Center ID	Grant Hierarchy ID	Grant Manager	Cost Center ID	Grant Hierarchy ID	Grant Financial Analyst	Cost Center ID	Grant Hierarchy ID	Grant Account Certifier
CC1001	GR1039	Serily Vitek	CC1001	GR1039	Charlotte Lewis	CC1001	GR1039	

Image 6: Missing Roles

Missing Workday Finance Security Roles within a Hierarchy

Once the report is narrowed down to a single Grant Hierarchy, missing Workday Finance Security Roles (above, Image 6) will be highlighted in yellow. Missing roles can result in a lack of compliance with post-award activities and can slow the award set-up process for OSP.



Guidance regarding Alert Messages for Missing Grant Roles can be found [here](#) in a presentation created by UVA Finance and UVA OSP Post Award.

Missing roles can be filled by following the instructions below: Updating Roles on an Existing Hierarchy.

Updating Roles on an Existing Hierarchy

Users can update roles on an existing hierarchy using Workday's System Access Requests. UVA Finance has a [Quick Reference Guide](#) for System Access Requests; it outlines the general information needed to submit a request and the process for approval.



Keep in mind that if a grant hierarchy is already created, **OSP does not need to complete role updates and/or re-assignments.**

Please note that after the changes are made, the [Workday Grant Hierarchy Roles report](#) is an overnight refresh. A hierarchy can be reviewed directly in Workday for the most current role information.

Below is some guidance designed to help with the process of updating Grant Hierarchy Roles. Review the information below in tandem with Finance's Quick Reference Guide when submitting Role updates:

1. A System Access Request to change roles may be initiated by a user and/or the user's direct supervisor. If a user initiates the request, their supervisor must approve.
2. The "Action Needed" is dependent on what changes are occurring. For some scenarios, multiple FIN Requests will be necessary because both **Add** and **Remove** must occur.
 - In general, choose **Add** if you are adding someone new to a role in the Grant Hierarchy. Choose **Remove** if you need to remove someone from a role in the Grant Hierarchy.
3. Answer **NO** to the question "Are you asking for more than 25 grants/projects/worktags/organizations".
4. Under Part 1: Tell Us What You Need to Do, answer the questions as outlined below:
 - Please select what you need to do: **Other**
 - Other, please explain: **Update Grant Hierarchy roles**

Reviewing, Updating, and Requesting Grant Hierarchies

- What Schools, Departments or Units: **List the related cost center**
5. Under Part 2: Select Security Roles, answer the questions as outlined below:
- Role: Choose Grant Financial Analyst, Grant Account Certifier, or Grant Manager. If you have multiple roles to fill for the person, you can click the + to add a second line.
 - Organization Type: Choose Grant Hierarchy
 - i. **IMPORTANT:** This will update the role on every grant worktag under the Grant Hierarchy umbrella.
 - Organization: Type the Grant Hierarchy **cost center** into the search box and hit Enter.
 - i. If the cost center has more than one Grant Hierarchy, all available options will present in your search results. (See Image 7, below.) More than one option may be selected.
 - ii. If you have an additional cost center that needs the same update, search again to select it.
 - iii. **IMPORTANT:** Search by **cost center** to avoid selecting the Business Unit parent hierarchy.

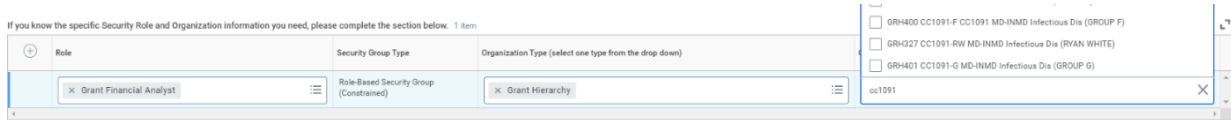



Image 7: Security Roles

	<p>Roles in the Grant Hierarchy are identified by Position ID (for example, P199051), not by job title or name. If a person changes their position, their prior position becomes unfilled, which will affect Workday Finance Security Roles in a grant hierarchy.</p> <p><i>Below are some examples of how Workday Finance Roles can be affected by HR personnel updates, and what actions users should take to process updates.</i></p>
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Scenario	Actions Needed
<p>Judy, P199051, is the Grant Manager for several awards. Judy is promoted to a new role. Judy's new Position is P199052. P199051 is backfilled by new employee Sam. However, the unit wants Judy to remain the Grant Manager.</p>	<p>Add Judy in P199052 as Grant Manager on the Grant Hierarchy. When selecting Judy, confirm the <i>Position for which Security is Requested</i> is accurately showing her new Position.</p> <p>Remove Sam and P199051.</p>

Reviewing, Updating, and Requesting Grant Hierarchies

Scenario	Actions Needed
<p>Grant Manager Judy, P199051, leaves UVA for a new job. It takes 6 months to replace Judy with new hire Sam in Position P199051. During those 6 months, Alex, Position P199053, temporarily fills in as Grant Manager.</p> <p>The unit would like new hire Sam in Position P199051 to be the Grant Manager after her training is complete.</p>	<p>Add Alex in Position P199053 as Grant Manager.</p> <p>When new hire Sam is ready to take on the duties of Grant Manager, Remove Alex in Position P199053.</p> <p>Note: P199051 can remain as a secondary Grant Manager during this period of transition. It will list as Unfilled until Sam is hired. If there is a desire to not have Sam see Workday tasks during the onboarding/training period, Position P199051 will need to be removed and added back.</p>
<p>You want to have a secondary Grant Manager, Alex in Position P199053, listed in your Grant Hierarchy, while still retaining Grant Manager Judy, Position P199051.</p>	<p>Add Alex in Position P199053 as Grant Manager.</p>

Requesting a NEW Departmental Grant Hierarchy

There are times when a new departmental Grant Hierarchy must be created. For example, an existing cost center may require an additional (new) hierarchy, or a new cost center has been established and requires appropriate new hierarchy set-up. If an additional Hierarchy is needed or when a Departmental Grant Hierarchy has not yet been created, email osp-infoteam@virginia.edu with the following information:

- Cost Center
- Business Unit (School)
- Is this an additional hierarchy for the cost center? Yes/No
 - If yes, your hierarchies will be renamed with Groups (such as: Group A, Group B). Please describe how the multiple hierarchies for the cost center are distinct, typically by PI last name or award type, as this information will become the Group Identifier.
- Grant Manager(s)
- Grant Financial Analyst(s)
- Grant Account Certifier(s)
- Do you want the PI of each grant to be a Grant Account Certifier? Yes/No
 - If you do not name a Grant Account Certifier for the hierarchy, this answer **MUST BE YES**.
- Do any existing grant worktags need to be reassigned to this new hierarchy? Yes/No
 - If yes, provide a list.



It's important to review each Grant Role Description and assign the appropriate departmental personnel. **Keep in mind that certain Grant Roles may not be held by the same person.** Guidance regarding Workday Grant Role Descriptions and their typical duties and responsibilities, as well as how to make corrections when Alert Messages are received for Conflicting Roles, can be found [here](#) in an informative presentation created by UVA Finance and UVA OSP Post Award.