<u>Answers to questions (copied verbatim) from chat log during Mar 25/22 session</u>

(for any inconsistencies between answers given verbally during live presentation and the information below, please note that the information provided below takes precedence)

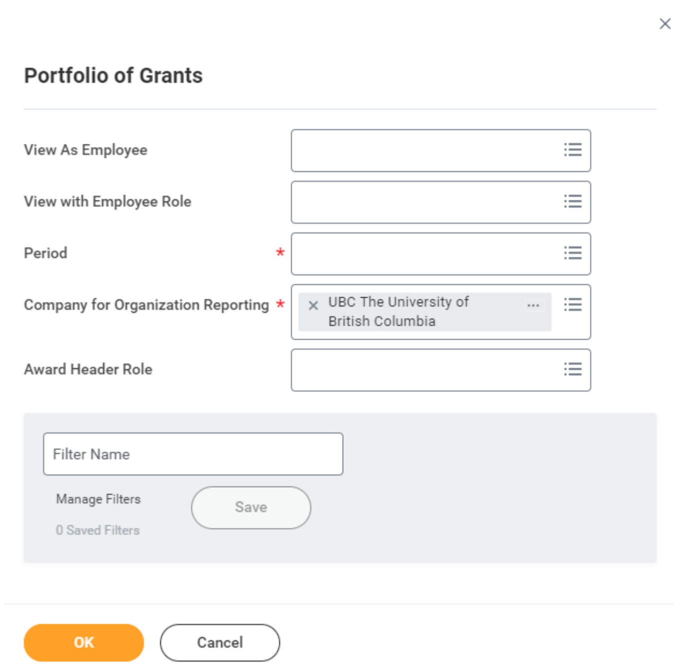
• It is important to note that not all your grants may appear on the grants dashboard…only a subset will appear if you have many.

• Thanks Amanda - I did notice dashboard only had a subset displayed. However should the extract to Excel have the full list of grants? Or is there a report for the full list?

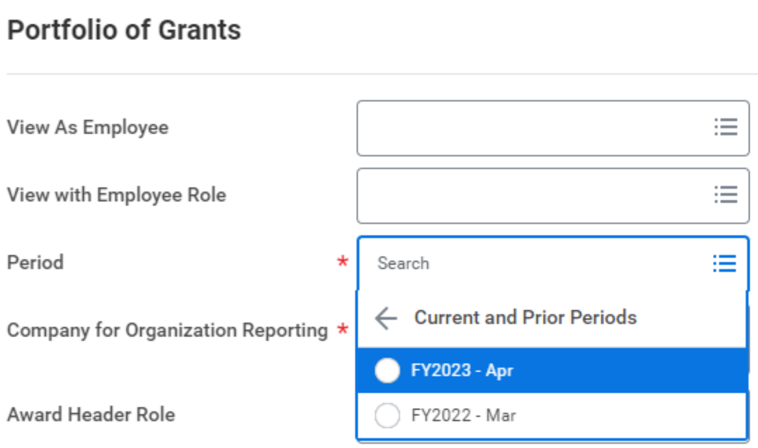
A: There are two versions of the Portfolio of Grants applet; one via Research Grants Dashboard, and one through the search box. Clicking on the "View More..." option for the Portfolio of Grants applet on the dashboard should bring up a dialog box that allows you to input values to pull your GR worktags and their parameters, providing the same output as the Portfolio of Grants applet from the Workday search box (ie. the non-dashboard version). A value should be input for the "Period" prompt. It should be noted that the Portfolio of Grants excludes inactive grants and grants without transactions.

• The "view more" doesn't work. I'm afraid.

A: We reached out to the two PIs to determine the exact issue(s) they've encountered. Based on the subsequent response of the participants, we hope this has been resolved for them. The issue appeared to be related to the options used in the filter condition dialog box that popped up after clicking on "View More...":



The only field that requires a value to be input is the "Period" field, and by selecting the current period, ie. FY2023 - Apr in this instance:



the non-dashboard version of the Portfolio of Grants report will run and the output should represent the full list as described in the answer to the previous question.

• Can you please explain different options for Period and Time Period?

• Yes, second Paul's question - how do you narrow down time windows to run Grants Ledger Summary reports for different time periods, e.g. last fiscal year only, or between two specific dates that cross over a fiscal year.

A: Period serves as an anchor point that the Time Period field uses to reference from or to where the search range should be based upon.   Example given in the session was: If you wish to view the Grants Ledger Summary report for a GR worktag for the 12 months ended September 2020, you would select "FY2021 - Sep" as your "Period" value, and "Last 12 period" for your "Time Period" value.   Unlike FMS nQuery's GL Summary report, you cannot explicitly state the start and end month for your search, but also unlike FMS nQuery, you are not limited to just within a 12-period range (ie. you can extend your Grants Ledger Summary Time Period value beyond 12 months - for example, to the previous 36 periods, should you wish).

• Why does it take so long to run some Grants Ledger Summary reports?

A: Budget data is the primary reason why the report takes so long to run.   The report captures data from a number of different tables on Workday - some financial and some based on Award parameters - and the act of drawing budget information from the Award parameters table is where most of the time spent waiting for the report arises.

• On the Grants Ledger Summary - is there any way to have the obligations and commitments shown for the life of the grant? It defaults to the UBC current Fiscal Year, which is not helpful for grant financing.

• Any chance we can address Scott Finestone's question from 11:16AM on the previous topic? I share the same question.

A: This has now been rolled out per the UBC Finance newsletter sent out on Mar 25/22. Specifically, Obligations and Commitments now reflect life-to-date values, as opposed to year-to-date.

• Could the PI request assignment an additional grant manager when they submit their RPIF so that the delegate grant manager is on the grant immediately, without having to do an extra step later?

A: Based on the mention of having the additional GM on the RPIF, it's presumed the question is in relation to having the additional GM interfaced from RISe onto Workday, instead of waiting for the Workday GR worktag to be created before updating the GM role to have additional incumbents. RISe will only pass the PI as its sole GM incumbent due to system interfacing limitations, so if people other than the PI are to be added as GMs, this can only happen at this time through the established workflow processes (ie. PI initiated addition or request via ISC with PI's written delegation).

• Does the Grant Manager see the same data as the PI/Grant Owner on a Payroll Summary report?

A: Yes, Grant Manager sees same data as PI/Grant Owner. Grant Financial Analyst might not see employee name or number due to security access. A new role called "Payroll Detail Viewer" has been created, and Grant Financial Analyst can request this role, but this requires Finance Director approval in order to be granted.

• Will these slides be available? I'd like to share with faculty in my School--to those who couldn't make it.

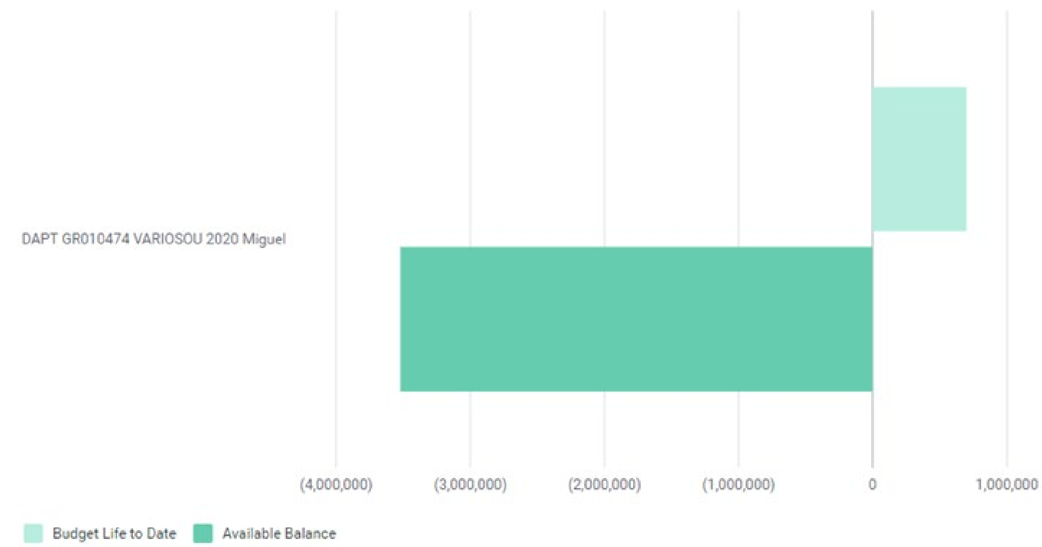
A: Yes, as indicated at the beginning and end of the session, they will be distributed by e-mail to the registrants, as well as posted to our Research Finance web site's Training pages.

• I'm wondering if you could please explain the Flags you mentioned at the very beginning of the presentation - can you expand on that?

A: The part of the presentation where the flag was mentioned was in the review of the "Portfolio of Grants" applet. The flag appeared under the "Available Balance" column and it's an indication that the

Grant worktag shows a balance that is 10% of the total budget or less (including overspent balances). If end dates have passed, red diamond will appear beside them.

Portfolio of Grants



Contract End Date	Spend End Date	Budget Life to Date	Salaries Life to Date	Expenses Life to Date	Balance Before Commitments and Obligations	Prepaid Expenses	Obligations	Commitments	Available Balance	Last 6 Months Total Spend
2099-12-31	2099-12-31	699,038	3,527,707	691,935	(3,520,605)	0	0	0	(3,520,605)	(32)

View More ...