

Including
Brainstorm Ideas



W25 Award Lifecycle Status

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Agenda

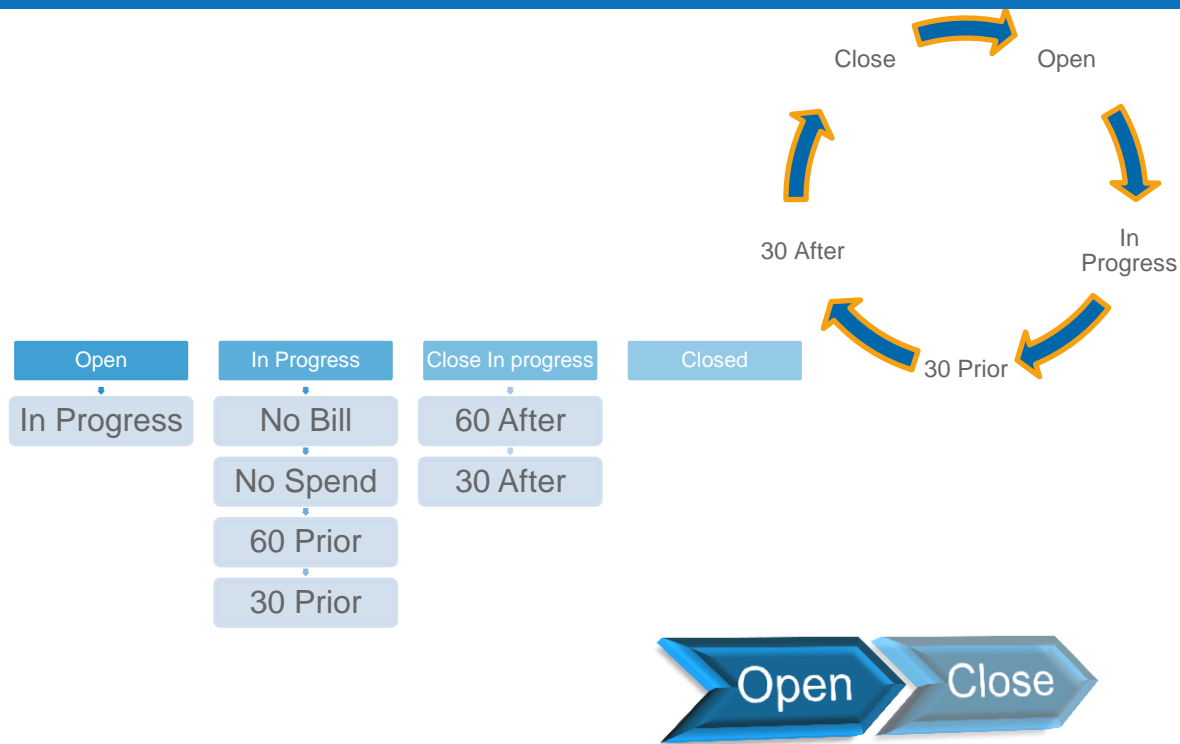
- Feature Overview
- Details
- Other Information
 - Data Sources and Fields
 - Web Services
 - Security
- Customer Impacts



Feature Overview

Feature Overview

- Award Lifecycle Status is customer driven status for the award and award line.
- It gives the customer the ability to define their own status per their own business.



Benefits

- The customer can define lifecycle that fit their business practice for Grants Management.
- Facilitating the ability to manage and report awards as they progress overtime.

Value: Why Did Workday Develop This Feature?

- Key problems or customer pain points solved
 - -Cannot Track or Report Awards by the Institutions Statuses
- Close the gap

Before	WD25
No Award statuses available on award header. Only WD defined statuses on award line	Can report activity based on locally defined statuses



Details

Create Award

Create Award

Award Number (empty) Version 0

▼ Award

Company * Grants Management University

Name

Description

Award Lifecycle Status ☒ Open

Sponsor Award Reference Number

Award Date *

search

- Closed
- In Progress
- No Spend
- Open

Award Lines

Award Notes

Billing Notes

Add



Line Number

1

Billed To Date

0

▼ Award Line Details

Line Item Details

Company * G200.1 Grants Managemen...

Line Type * Cost Reimbursable

Primary ☐

Grant * search

Line Amount 0.00

Revenue Category * search

Award Line Lifecycle Status ☒ Open

Line Item Description

Deferred Revenue ☐

search

- 30 Days After
- 30 Days Prior
- Closed
- No Bill
- No Spend
- Open

New Tasks

Award Lifecycle Status

Open

The screenshot shows a software interface with a dropdown menu open. The dropdown menu is titled 'Actions' and contains the following items: 'Award Lifecycle Status', 'Audits', 'Award', 'Effective Stating', 'Favorite', 'Instance', and 'Integration IDs'. Each item has a right-pointing chevron. The 'Award Lifecycle Status' item is highlighted with a blue bar on its left. To the right of the dropdown menu, a secondary menu is visible, containing the items: 'View', 'View Combinations', 'Maintain', and 'Maintain Combinations'. The background of the interface shows a table with the header 'Award Lifecycle Status' and a row with a dropdown arrow and the text 'Award Amounts'.






Award Lifecycle Status
⌵ Award Amounts

⌵ Award Amounts

Set up Award Lifecycle

Maintain Award Lifecycle Statuses

10 items

	Award Lifecycle Status	*Name	Valid for Award	Valid for Award Line	Default for Award	Default for Award Line	Inactive	Use
		<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	30 Days After	30 Days After	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	30 Days Prior	30 Days Prior	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	60 Days After (inactive)	<input type="text" value="60 Days After"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	60 Days Prior (inactive)	<input type="text" value="60 Days Prior"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Closed	Closed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	In Progress	<input type="text" value="In Progress"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No Bill	No Bill	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	No Spend	No Spend	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	Open	Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



OK

Cancel

Set up Award Lifecycle Combination

Maintain Award Lifecycle Status Combinations

4 items

Award Lifecycle Status	Award Line Lifecycle Statuses	
Closed	<input type="text" value="search"/>	<div><input type="text" value="search"/></div>
In Progress	<input type="text"/>	<input type="text"/>
No Spend	<input type="text"/>	<input type="text"/>
Open	<input type="text"/>	<input type="text"/>

30 Days After

30 Days Prior

Closed

No Bill

No Spend

Open

Set up Award Lifecycle Combination

Maintain Award Lifecycle Status Combinations

4 items



Award Lifecycle Status	Award Line Lifecycle Statuses
Closed	<div><div>search</div><div><div>✕ Closed</div><div></div></div></div>
In Progress	<div>30 Days After</div> <div>30 Days Prior</div> <div>No Bill</div> <div>No Spend</div> <div>Open</div>
No Spend	<div>30 Days After</div> <div>Closed</div> <div>No Bill</div> <div>No Spend</div>
Open	<div></div>

View Award Lifecycle Status

In Progress	
Award Lifecycle Status In Progress	
Name	In Progress
Valid for Award	Yes
Valid for Award Line	No
Default for Award	No
Default for Award Line	No
Inactive	No
Award Line Lifecycle Statuses	30 Days After 30 Days Prior No Bill No Spend Open

Reporting

Award Lifecycle Status

Company

✕ G200.1 Grants Management University

✕ A200.1 Alma Mater University (USA)

Award Line Lifecycle Status

✕ Closed

✕ In Progress

✕ 60 Days After (inactive)

✕ 60 Days Prior (inactive)

✕ 30 Days After

✕ 30 Days Prior

✕ No Spend

✕ No Bill

✕ Open

Effective as of Date

01/01/2015

Award Lifecycle Status

Company	A200.1 Alma Mater University (USA) G200.1 Grants Management University	Effective as of Date	01/01/2015
Award Line Lifecycle Status	30 Days After 30 Days Prior 60 Days After (inactive) 60 Days Prior (inactive) Closed In Progress No Bill No Spend Open		

5 items

Contract Line	Award Line Grant	Award Line Lifecycle Status	Award for Award Line	Award Lifecycle Status
100015 Cost Reimbursable Grants (Line 1)	Disparities Line 1	30 Days After	100015: National Institutes of Health 10/29/2013 (version 0)	In Progress
100015 Cost Reimbursable Grants (Line 2)	Disparities Line 2	Open	100015: National Institutes of Health 10/29/2013 (version 0)	In Progress
100017 Cost Reimbursable Grants (Line 3)	Sedimentology Sequence Mix 1.2	Open	100017: National Science Foundation 01/01/2014 (version 0)	Open
100017 Cost Reimbursable Grants (Line 2)	Sedimentology Sequence Mix 1.1	No Spend	100017: National Science Foundation 01/01/2014 (version 0)	Open
100017 Cost Reimbursable Grants (Line 1)	Provenance of Sands	No Bill	100017: National Science Foundation 01/01/2014 (version 0)	Open

Business Process

View Business Process Definition [Award Event \(Default Definition\)](#) ...

Effective Date 06/30/2015

Security Group Restrictions

Alerts: 1

All Workflow Notifications are currently disabled in this tenant (Award Event (Default Definition))

View Diagram

Business Process Steps

Notifications

Allowed Actions by Role

Allowed Services

Allowed Subprocess For

Related Links

Available Rules & Fields

Business Process Steps 2 items

Step	Order	If	Type	Specify	Optional	Group	All	Run As User	Due Date	Due Date Is Based On Effective Date	Complete	
Q	a		Initiation		No							
Q	c	ALCS?	Action	Review Award	No	Grants Contract Accountant					Yes	

Actions

- Audits >
- Condition Rule >
- Effective Stating >
- Favorite
- Instance >
- Integration IDs >
- Purgeable >
- Reporting >
- Search Index Target >
- Security Profile
- Validation >

Business Process Condition IF ALCS THEN Entry of c - Review Award

Triggers Workflow Step [c - Review Award](#)

Condition Rule [ALCS](#)

Description [ALCS](#)

Comment Review Awards with status of open at create

Category (empty)

Derived Logic Award Lifecycle Status +TG in the selection list Open

Rule Conditions

Rule Usage

Rule Conditions

And/Or	(Source External Field or Condition Rule	Relational Operator	Comparison Type	Comparison Value)
And		<input checked="" type="checkbox"/> Award Lifecycle Status +TG	In the selection list	Value specified in this filter	Open	



Other Information

Data Sources and Fields

- New CRF
 - Award Lifecycle Status
 - Award Line Lifecycle Status

Web Services

- Web Service
 - New Award Lifecycle Statuses
 - Updated
 - Award
 - Award Amendment
 - Award Correct

Security

- Domain Security Policy
 - Set Up: Grants
 - Maintain Award Lifecycle Statuses
 - Maintain Award Lifecycle Status Combination

Customer Impact

- Customer must opt-in



Thank You