

# Create Grant

**QUICK TAKE:** The **grant** is the worktag that all grant information lives in. It is what links a PI's grant to OSP and the Business Office

## CREATE GRANT

1. From the **Workday Home Page**, enter **Create Grant** in the search field.

Grant Name	*	<input type="text"/>
Grant ID		<input type="text"/>
Include Grant ID in Name		<input type="checkbox"/>
Inactive		<input type="checkbox"/>
Grant Hierarchy		<input type="text"/> ⋮
Salary Cap for Grant		<input type="text"/> ⋮

2. From the *Create Grant* screen, enter the following information:

- **Grant Name:** The grant name should be the “short name” of the grant. The creator’s discretion chosen by the PI to be used as the Proposal/Award “long name”
- **Grant ID:** This field may be left blank. The grant will populate the grant ID after the grant is created.
- **Include Grant ID in Name:** Yes
- **Inactive:** No
- **Grant Hierarchy:** What is entered into this field will depend on who the PI is. Typically, the grant hierarchy will match the PI’s school.

Related Worktags

Assign Roles

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## CREATE GRANT – Worktags

3. After filling out the information at the top, you will then have to fill in the worktag information

Worktag Type	Allowed Worktags	Default Required	Default Worktag	Required on Transaction
Cost Center	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Fund	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
Function	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

- **Cost Center:** The cost center all grants will be housed under is: **8000099 Office of Sponsored Programs**
- **Fund:** This field depends on who is sponsoring the grant. For example, a grant being sponsored from NSF will be tagged as **Fund 20** and **Fund 30** for **Allowed Worktags**. Because the more specific option is **Fund 20**, that should be used as the default worktag.
- **Function:** This field is dependent on the purpose of the grant.

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## CREATE GRANT – Assigning Roles

4. Lastly, fill out the roles associated with the grant. Specifically, the PI.

Related Worktags Assign Roles

Assign Roles 1 Item

⊕	Role	Restricted to Single Assignment	Assigned To
⊖	Principal Investigator	<input checked="" type="checkbox"/>	