## Table of Contents

Section 1: Overview ................................................................. 3  
  Security and Access ............................................................ 4  
  Logging On ........................................................................... 4  
  Menu Navigation ............................................................... 6  

Section 2: Update Panels  
  Past Pay Period Project Changes ........................................ 7  
  Future Pay Period Changes ............................................... 15  
  Past Pay Period Position Number Changes ........................ 20  
  Summer Encumbrance Build .............................................. 25  

Section 3: Inquiry Panels  
  Future Pay Details .............................................................. 29  
  Future Pay Update History ............................................... 29  
  Past Pay Period by Date/Period ......................................... 30  
  Past Pay Period Update History ....................................... 30  
  SPD Detail ........................................................................... 31  

Section 4: Reports  
  Weekly Employee Cost Detail .............................................. 32  
  Monthly Project Detail - Past Period ................................. 35  
  Monthly Project Detail GL - Posting ................................. 37  
  Undesignated Sponsored Summary .................................... 39  
  Undesignated Sponsored Detail ......................................... 41  
  Monthly Salary Distribution Change Summary .................. 43  
  Monthly Salary Distribution Change Detail ....................... 45  
  Salary Distribution Change Summary ............................... 47  
  Salary Distribution Change Detail ..................................... 49  
  Workload Assignment ........................................................ 51  

Section 5: Tips and Techniques  
  Helpful Hints!! .................................................................. 53  
  Salary Planning and Distributed Transmittal Form .............. 54
Section 1: Overview

The electronic redistribution of personal service costs is a form of cost transfer involving the movement of personal service costs from a non-sponsored project to a sponsored project, or from a sponsored project to any other project. The matter of personal services cost transfers is a sensitive issue in the university’s operation of its sponsored programs and receives careful scrutiny by sponsor representatives, especially federal government contracting officers and auditors.

The PeopleSoft based SPD (Salary Planning & Distribution) system will be used to enter salary plans and to redistribute incurred salary costs posted to the General Ledger to properly reflect actual time and effort activity.

The PeopleSoft based SPD system will NOT be used to enter salary and account information for new employees, transferring employees, promoted employees, or employees getting job upgrades via an approved Office of Human Resources process. A new PSF (Personal Services Form-located on the TECHWORKS web site) will be used for these job actions. SPD will NOT be used to enter salary amounts for a new fiscal year. This information will be entered into the Budget system using instructions and forms issued by the Budget Office.

Any changes required that move charges from one department to another must be approved by both departments. This approval may happen in one of two ways:

One of the units may grant permission to the other unit to make the change online, or

Both units may submit an approved Monthly Employee Cost Detail and a SPD Transmittal Form to the Grants and Contracts Accounting Office/SPD Center. If a unit wishes to grant permission to another unit’s staff member to make changes, they should submit a written request to the Grants and Contracts Accounting Office/SPD Center.

The request should indicate the name of the person given permission to make the changes and should also list their user ID. Be aware that once an individual has been given permission to make changes for a particular organization, that person has access to all persons and projects that work for that organization.
Security and Access

Users of the SPD module will be allowed to access employees of the organizations/projects for which they are responsible. If an employee has joint appointments in two or more organizations/projects, users will be able to view all distributions of the employee’s salary; however, they may only make changes to move expenses from the other organization’s project to their own project unless written approval has been granted.

Logging On

Go to techworks.gatech.edu
Enter your GT Account and password.

TechWorks is the gateway to all administrative functions, forms, links, and reports – everything you need in one place.

Contact the OIT Help Desk at 404-894-7173 if you need help with your GT Account or password.
Once you are in Techworks, you can access Salary Planning & Distribution from the "My Work" tab under the Applications and Resources section.

Click “Salary Planning & Distribution”
Menu Navigation

Click on the link for the page you want to use. Once you are in the SPD application you will then use the menu to navigate from page to page.

SPD Transactions

- **Update**
  - Past Pay Period Project Change
  - Past Pay Period Posn Nbr Chg
  - Future Pay Period Changes
  - Summer Encumbrance Build

- **Inquiry**
  - Future Pay Details
  - Future Pay Update History
  - Past Pay Period by Date/Period
  - Past Pay Update History
  - SPD Detail

- **Reports**
  - Monthly Employee Cost Detail
  - Monthly Project Dtl - Past Prd
  - Monthly Project Detail - GL
  - Undesignated Sponsored Summary
  - Undesignated Sponsored Detail
  - Monthly Salary Dist Change Sum
  - Monthly Salary Dist Change Dtl
  - Salary Distribution Change Sum
  - Salary Distribution Change Dtl
  - Workload Assignment Report

PeopleSoft displays the SPD menu.

- **Update**
  - Past Pay Period Project Change
  - Past Pay Period Posn Nbr Chg
  - Future Pay Period Changes
  - Summer Encumbrance Build

- **Inquire**
  - Future Pay Details
  - Future Pay Update History
  - Past Pay Period by Date/Period
  - Past Pay Update History
  - SPD Detail

- **Reports**
  - Monthly Employee Cost Detail
  - Monthly Project Dtl - Past Prd
  - Monthly Project Detail – GL
  - Undesignated Sponsored Summary
  - Undesignated Sponsored Detail
  - Monthly Salary Dist Change Sum
  - Monthly Salary Dist Change Dtl
  - Salary Distribution Change Sum
  - Salary Distribution Change Dtl
  - Workload Assignment Report
Section 2: Update Panels

Past Pay Period Project Changes

Navigate: Salary Planning and Distribution>Update> Past Pay Period Project Change

Past Pay Period Project Change
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Empl ID begins with

Search Advanced Search

Past Pay Period Changes Panel Search

Past Pay Period Project Change
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Empl ID begins with

Search Advanced Search

Select the employee record for a basic search (use the Advanced Search selection criteria fields to narrow your search)
**PeopleSoft Employee ID Number** - all records for that particular employee

**Business Unit/Company** - all records of employees (for which you have access) for Business Unit/Company.

**GL ORG value** - all records for that Organization in Employee ID Number order.

**Project/Grant Number** - all records for that Project/Grant Number in Employee ID Number order.

**Name** field - there is no space between comma and first name, use upper and lower case letters—example: Last,First records for that particular employee are displayed.

**Last Name** - all records of employees (for which you have access) with that given last name, also in order by Employee ID Number.

Note: If you do not enter any selection criteria, all employees (you are authorized to view) will be displayed. The number of records displayed are limited however.

Click [Search] or hit “Enter” key. A selection box will display the results of your search. *“Note if the employee has multiple Empl Rcd Nbr’s.”*

---

**Past Pay Period Project Change**
Enter any information you have and click Search. Leave fields blank for a list of all values:

- **Find an Existing Value**
- **Search Criteria**

**Search by:** Empl ID ▼ begins with 82150

**Search Results**

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Name</th>
<th>GL ORG value</th>
<th>Project/Grant</th>
<th>Empl Rcd Nbrs</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>82150</td>
<td>Smyth, Jon</td>
<td>150</td>
<td>1601310</td>
<td>0</td>
<td>SMITH</td>
</tr>
<tr>
<td>82150</td>
<td>Smyth, Jon</td>
<td>150</td>
<td>1606BAA</td>
<td>0</td>
<td>SMITH</td>
</tr>
<tr>
<td>82150</td>
<td>Smyth, Jon</td>
<td>150</td>
<td>160BECA</td>
<td>0</td>
<td>SMITH</td>
</tr>
</tbody>
</table>
Select by double clicking on the record or hit “Enter” key if only one empl rcd.

PeopleSoft displays **Name, Employee ID, Record Number and FTE** for the record you selected. The current fiscal year is displayed.

**Accounting Period(s) or Pay Period(s) Required**

- **Enter** the Accounting Period or Pay Period End dates you wish to change. The Accounting Period should be used for monthly employees. (Example: Period 1 represents the first month of the fiscal year—July, and Period 12 represents June).

- Pay Period End date is best used for bi-weekly employees, when you wish to change only one pay period.

- **Tab** to “Thru:” box and enter the ending accounting period you want changes to be effective through.

- **Press** Tab on the keyboard and the Select button will activate.

- **Click on Select**
The records for the accounting/pay period will be displayed. If period range is over 90 days old, then you will receive a warning message (See 90 day late moves for detail).

PeopleSoft will now present all data that meets criteria for the person selected and for the Accounting Period(s) and fiscal year indicated.

**Project/Account Distribution Displayed**

- The project distribution may consist of more than one Account/Object within a project. Use the **Project Navigation Bar to view multiple Project Numbers**. **View All** will display all Projects while the **First**, **Last** arrows move from project to project.

- The Selected Total is the total salary paid across all projects and account/object codes for the person and period selected.

- If the Selected Total is not equal to the amount of the Project you are viewing, you have more than one project for the criteria selected.

- Once you have navigated to the project you would like to change, click on **Use This Proj/Acct**.

- The Project information will then appear in the “From Project” and “Account” area.
To select the “To Project” click on Edit Chartfields link. If you know the project number you wish to distribute changes to, enter it in the “Combination Code” field; otherwise, select the and double click on the project from the list. (This list is limited in the number of projects it will display however). Hit “Enter” Key and click “OK” button to return to Past Changes panel.

Justification For Externally-funded Sponsored Projects

If a change is made TO an externally-funded sponsored project**, you are required to enter a justification after the “TO” project selection from “Edit Chartfield” link. A Justification box will appear on the screen. This information must be entered before the system will allow any changes to be saved.

Click on the box
Select a justification by clicking on the drop down arrow one of the five general Justification Reasons or if “Other”, enter a detailed explanation.
The Justification Reasons are listed as follows:

- 1. Correction of labor charges based on review by employee, PD/PI, or authorized delegate.
- 2. Correction of clerical error or data input error identified by authorized unit financial personnel.
- 3. New Award costs incurred during the award period charged temporarily to other allowable funds pending establishment of a new award/fund.
- 4. Allowable pre-award costs (incurred prior to the award period) initially charged to other allowable funds.
- 5. Renewal award costs charged originally to prior sponsored increment or to other allowable funds.
- 6. Other: Specify

♦ Click on the appropriate Justification you wish to select. If you selected Reason 6. “Other: Specify”, enter a detailed justification in the text box that appears.

♦ Click on OK to go back to the Past Pay Change panel.

♦ Tab or click on the Amount field and enter the amount of the redistribution desired. You can only enter up to the amount on the Acct Distribution Line. (Note that all Past Pay Period Changes are entered in dollar amounts for the projects/periods/persons selected. If multiple accounting or pay periods are selected, PeopleSoft will prorate the amounts entered over all the projects selected.)

NOTE: Any adjustments to move negative amounts between projects (payroll voids, for example) must be made through the Grants and Contracts SPD Center. PeopleSoft will not allow the movement of negative amounts between projects.
♦ Use the Tab key (Not Enter) and the Apply button activates.
♦ Click on the Apply button.

♦ The redistributed total shows the total amount of the changes made and takes the information from the amount field and adds to the project distribution selections.

♦ Multiple changes - If you need to make multiple redistributions from the same project, click on the Use This Proj/Acct button again and enter the next project using the “Edit ChartField” link. The Justification button will appear again if the project is an externally funded sponsored project. Select a new Justification and OK. Then tab/click Amount field and enter the amount of the redistribution desired. Tab (Not Enter) to Apply button and click. Repeat process for next project from the same project. When all desired redistributions are made from the same project and applied, click on the Save button (at bottom left of page).

Note: If you made a change to an individual and saved the information, you will want to clear the panel (Clear), and refresh the screen before making any additional changes to the same individual for a different accounting period.

♦ If the information is not correct and you have not “SAVED”, and you wish to begin again with the same employee, click on the Clear button (bottom left hand corner of screen).

♦ If the information entered is incorrect, has not been “SAVED” and you wish to view another person or account or if you wish to end the entire session, click on the Return to Search button (bottom menu bar). You will get this message:

![Save Warning]
You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.

OK Cancel

♦ Click the Cancel button and the entire panel will be cancelled and no changes will be committed.

♦ Past Pay Period changes will be effective immediately. New reports produced will reflect changes.
Over 90 Day Late Redistributions

If a change is made more than 90 days after the original posting, a Warning Message will appear on the screen. This warning will advise you to select a more current accounting period if you are to make a redistribution to an externally funded sponsored project. **Note: Exclusions - Projects funded by GTF and GTRC, and transfers between projects with the same fund code are not subject to the 90 day limit or Justification requirement.**

![Message]

If you are not making a change to an externally funded sponsored project, click the “OK” button. Select From Project [Use This Proj/Acct]. Proceed with your "TO" project selection with [Edit ChartFields] Link and enter your Project. If you enter an externally funded sponsored project in the Edit Chartfield link for the “TO Project”, you will receive this error message:

![Message]

SPD will not allow you to complete the redistribution and you will need to select a nonexternally funded sponsored project or cancel the transaction.

*For over 90 day redistributions to externally funded sponsored projects, you will have to submit an SPD transmittal form completing the Over 90 Day Section to the SPD Center for approval by the Director of Grants and Contracts Accounting, the Assoc Vice President of Financial Services, and the Assoc Vice Provost for Research. If the transaction is approved, the SPD Center will make the redistribution for the departments.*
Future Pay Period Changes

Navigation: Salary Planning Distribution / Update / Future Pay Period Changes

Future Pay Period Changes
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

<table>
<thead>
<tr>
<th>Search Criteria</th>
</tr>
</thead>
</table>

Search by:  
- Empl ID
- Business Unit/Company
- Fiscal Year
- GL ORG value
- Last Name
- Name
- Project/Grant

Select the employee record for a basic search (use the Advanced Search selection criteria fields to narrow your search)

PeopleSoft Employee ID Number - all records for that particular employee

Business Unit/Company - all records of employees (for which you have access) for Business Unit/Company.

Fiscal Year - all records for that Fiscal Year (for which you have access) in Employee ID Number order.

GL ORG value - all records for that Organization in Employee ID Number order.

Last Name - all records of employees (for which you have access) with that given last name, also in order by Employee ID Number.

Name field - there is no space between comma and first name, use upper and lower case letters—example: Last,First. records for that particular employee are displayed.
**Project/Grant Number** - all records for that Project/Grant Number in Employee ID Number order

Note: If you do not enter any selection criteria, all employees (you are authorized to view) will be displayed. The number of records displayed are limited however.

Click **Search** or hit “Enter” key. A selection box will display the results of your search.

**Future Pay Period Changes**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Empl ID begins with 99999

Select by double clicking on the record if multiple Empl Rcd Nbrs or hit “Enter” key. PeopleSoft displays **Name, Employee ID, Record Number and FTE** for the record you selected. The current fiscal year is displayed
Fiscal Year/Accounting Period

- The screen will display the last Future period created for the current fiscal year. You must use the Navigation Bar to access other future accounting periods in the current fiscal year. Future Periods will be grayed-out if already past, you can only make changes for the future.

**NOTE:** There is a “gray out” period when no changes will be allowed for the CURRENT accounting period only. This “gray out” occurs because the Payroll Office has begun the process of running the payroll and any changes you enter during this period would not be reflected on the issued paycheck. At this point, you must wait until the payroll posts and then enter a Past Pay Period Change. The current accounting period will actually be gray on the screen. “Blackout” days are when PeopleSoft is unavailable due to month-end processing.

Navigate down using to the appropriate accounting period in which you want the change to start. will display all Future Periods or arrows will navigate from period to period. If an accounting period is not shown, you can insert one by clicking on the button in the accounting period line. Use the button if all accounting periods are grayed out.

**NOTE:** Any change will continue in effect until the end of the fiscal year unless another future accounting period in the fiscal year is in PeopleSoft. **But keep in mind that if you delete several accounting periods in a row to shortcut redistributing each period, any non-SPD**
actions that hit the Job Panel in HR may change the distribution if it hits during one of these deleted periods in the SPD Future Panel.

- For example, if you change the distribution for period 3 from 100% Project A to 50% to Project A and 50% to Project B, that distribution will remain until the next pay period distribution shown in PeopleSoft. (You can determine the next distribution by using the arrow buttons.)
- If you wish for the change to be effective only for Period 3 and 4, you must change Period 5 to reflect the distribution you want for the remainder of the year.

- If the Accounting Period in which the current distribution began has passed, the Future Pay Period Changes panel will be grayed out and changes will not be available.

- For most Fiscal and Academic employees with a consistent pay distribution, all accounting periods should be populated. For group positions or new hires, only one to three accounting periods may be populated. To insert a new accounting period. Click on the button on the Accounting Period line. To delete an accounting period, click on the button on the Accounting Period line.

Project/Percent

- Enter the percent and project number for the future distribution(s). Type in the new project number or choose from a list via the drop down arrow

- Inserting a new row - If you need to add a row for a new percent project distribution, click on the button on the project distribution line. To delete a project distribution row, click on the button on the project distribution line.

- If you wish to make more than one change, insert another row and make additional changes before saving. Review the information and if it is correct and complete, click on the button (bottom left corner of page).

- If the information is incorrect and has not been saved, cancel out of the panel by clicking on the icon. You will get this message:

![Save Warning]

You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.

OK Cancel
♦ Click the [Cancel] button and the entire panel will be cancelled and no changes will be committed.

♦ Future Pay Period changes will be reflected on the on-line panels immediately and on the Monthly Employee Cost Detail Report; however, project reports produced on the same day will not reflect changes. Changes will be reflected on reports the following business day, after batch processes are run.
Past Pay Period Position Number Changes

Navigation: Salary Planning Distribution/Update Pages /Past Pay Period Posn Nbr Changes

Past Pay Period Posn Nbr Chg
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: [Search by EmplID\nBusiness Unit\nCompany\nEmplID\nGL ORG value\nLast Name\nName\nProject/Grant]

Select the employee record for a basic search (use the Advanced Search selection criteria fields to narrow your search)

PeopleSoft Employee ID Number - all records for that employee.

Business Unit/Company - all records of employees (for which you have access) for that Business Unit/ Company.

GL ORG value - all records for that organization in Employee ID Number order.

Last Name - all records of employees (for which you have access) with that given last name, also in order by Employee ID Number. If you do not enter any selection criteria, all employees (you are authorized to view) will be displayed.

Name field - there is no space between comma and first name, use upper and lower case letters—example: Last,First. records for that particular employee are displayed

Project/Grant Number - all records for that Project/Grant Number in Employee ID Number order.
Click **Search** A selection box will display the results of your search.

Select by double clicking on the record or press “Enter” on the keyboard.

PeopleSoft displays **Name, Employee ID, Record Number and FTE** for the record you selected. The current fiscal year is displayed.

**Accounting Period(s) or Pay Period(s): Required**

- **Enter** the Accounting Period or Pay Period End dates you wish to change.
  The Accounting Period should be used for monthly employees. (Example: Period 1 represents the first month of the fiscal year—July, and Period 12 represents June).
♦ Pay Period End date is best used for bi-weekly employees, when you wish to change only one pay period.

♦ **Tab** to “Thru:” box and enter the ending accounting period you want changes to be effective through.

♦ **Press** Tab on the keyboard and the Select button will appear.

♦ **Click on** Select

The records for the accounting/pay period will be displayed.

PeopleSoft will now present all data that meets criteria for the person selected and for the Accounting Period(s) and fiscal year indicated.

---

**Project/Position Distribution: Displayed**

♦ If there are **multiple Projects**, use the **Navigation Bar above the Project Line**. **View All** will display all Projects while the **First 1 of 4 Last** arrows move from project to project.

♦ The project distribution may consist of more than one Position within a project. Use the **Navigation Bar above**.
the Position Distribution line to view multiple Position Numbers. The Position/Department/Job Code distribution may be changed but should follow a PSF action to Human Resources (HR), otherwise future payrolls will continue to code the position Number according to HR Panels. Changes in Position Number must be done via a PSF form (HR Administration/Forms/Personnel Action Forms web page in TECHWORKS).

♦ The Selected Total is the total salary paid across all projects and positions for the person and period selected.

♦ If the Selected Total is not equal to the amount of the Project you are viewing, you have more than one project for the criteria selected.

♦ Once you have navigated to the project and position you would like to change, click on **Use This Posn Nbr**.

♦ The Project information will then appear in the “Confirm Transfer” area.

♦ If you know the position number you wish to distribute changes to, enter it in the “To Position” field; otherwise, select the search and double click on the position from the list. You may also change Department and Job Code but SPD will only accept valid data associated with the new Position Number.

![Confirm Transfer](image)

- **Tab** to **Amount field** and enter the amount of the redistribution desired. 
  Note: You can only enter an amount up to the amount on the Position Distribution line, **NOT THE SELECTED TOTAL LINE**.

**NOTE:** Any adjustments to move negative amounts between projects (voided checks, for example) must be made through the Grants and Contracts SPD Center. PeopleSoft will not allow the movement of negative amounts between projects.

♦ Use the Tab key (**not Enter**) and the Apply button activates.

♦ Click on the **Apply** button.
♦ The redistributed total shows the total amount of the changes made and takes the information from the amount field and adds to the project distribution selections.

Note: If you made a change to an individual and saved the information, you may want to clear the panel (Clear), and refresh the screen **before making any additional changes to the same individual.**

♦ If the information is not correct and you wish to begin again with the same employee, click on the **Clear** button (bottom left hand corner of page).

♦ If the information entered is incorrect, has not been saved and you wish to view another person or account or if you wish to end the entire session, click on the **Quit** button (bottom of page). You will get this message:

![Save Warning](attachment://Save_Warning.png)

You have unsaved data on this page. Click OK to go back and save, or Cancel to continue.

[OK] [Cancel]

♦ Click **Cancel** button to continue and page will be cancelled and no changes will be committed.

♦ Past Pay Period Position Number changes will be effective immediately. New reports produced will reflect changes.
Summer Encumbrance Build

Navigation: Salary Planning Distribution/Use/Summer Encumbrance Build

The Summer Encumbrance Build is used for 9 Month Academic Employees (Pay Groups AMB, AMN, and RWA) to set up salary encumbrances over the summer months, May thru August.

- Select the employee record for a basic search (use the Advanced Search selection criteria fields to narrow your search).
- Under Advance Search you can also narrow search with Empl Rcd Nbr, Last Name (Last,First), Name or Personnel Status in query page.

⇒ Hit the Enter key or double click on the employee record line to select the record.
PeopleSoft displays the Summer Encumbrance Build panel.

PeopleSoft ALWAYS ENCUMBERS ACADEMIC (10 month) APPOINTMENTS.

The default encumbrance is indicated by the radio buttons adjacent to Encumber ½ May and 0 June and 0 July and ½ August.

**Note:** If the effective date year is a prior fiscal year (especially 1999), insert a new current dated record regardless if it is set the way you want. That could be a false setting and there may not be an actual record in the SPD Tables. You will also have to click on a different radio button setting from what is displayed and click back to what you want before clicking the Save button in order for the new record to be save.

- Click on the button to the right of the page to insert a new row. The Effective Date will default to the current date. **NEVER OVERTYPE THE CURRENT SETTING ROW, ALWAYS INSERT A NEW ROW.**
- To change the encumbrance from the Default settings for the selected individual, click on the radio button adjacent to Encumber Full May and June and click on the radio button adjacent to Encumber Full July and August.
If the Summer Faculty Position and account (511300) are to be used:

⇒ Click on the Box next to Use Summer Fac Position... under each encumbrance period.

Once desired settings are chosen, click on **Save** button at bottom left of page**.

These settings will remain in effect until you change them back to the default encumbrance.

**Note: The summer school encumbrance change may not show up on the SPD reports until the Encumbrance Build Job runs over night.
Section 3: Inquiry Panels

Navigation: Salary Planning Distribution/Inquiry Pages

Future Pay Details
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Image]

There are five Salary Planning and Distribution inquiry screens.

Future Pay Details (Current Year Only)
Future Pay Update History
Past Pay by Period/Date Range (Current Year Only)
Past Pay Update History
SPD Detail (Detail transactions lines in SPD Tables)

Each inquiry panel displays records according to your search selections

♦ Enter PeopleSoft Employee ID Number for basic search. For Advanced search, additional parameters include: Business Unit, Company, Fiscal Year, GL ORG Value, Last Name, or Project/Grant.
♦ Hit Enter Key

SPD USERS MANUAL
Last Update: 10/2015
### Future Pay Details

**Name:** Jon Smith  
**ID:** 99999

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Accounting Period</th>
<th>Percent</th>
<th>Project</th>
<th>Sponsored Research - Undesignated</th>
<th>Earnings</th>
<th>Fringe</th>
<th>Tuition</th>
<th>FTE</th>
<th>Period Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>7</td>
<td></td>
<td>100.000</td>
<td></td>
<td>8,463.83</td>
<td>126.95</td>
<td>0.00</td>
<td>0.387500</td>
<td>8,463.83</td>
</tr>
</tbody>
</table>

**Earn Code:**  
**Project:**  
**Add'l Pay:**

### Future Pay Update History

**Name:** Jon Smith  
**ID:** 99999  
**Rcd:** 0

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Accounting Period</th>
<th>Project</th>
<th>Description</th>
<th>Percent</th>
<th>Create Date/By</th>
<th>Last Update Date/By</th>
</tr>
</thead>
</table>

*Update date and User ID Information*
Past Pay Period by Date/Period

For this inquiry, please enter the accounting periods or pay period end dates you would like to inquire and then click on Select.

Past Pay Period Update History

Click on "Last" to get current FY data. GTSPOBDL is the payroll posting.

Create Date and Create By information for audit.

Selected Total: 33,855.33
## SPD Detail

<table>
<thead>
<tr>
<th>Group</th>
<th>Retired Working Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept</td>
<td>Aerospace Engineering</td>
</tr>
<tr>
<td>Job Code</td>
<td>Regents Professor</td>
</tr>
<tr>
<td>Position</td>
<td>Misc Faculty</td>
</tr>
<tr>
<td>Pay Period End Date</td>
<td>07/31/2015</td>
</tr>
<tr>
<td>Action Date</td>
<td>09/03/2015</td>
</tr>
<tr>
<td>Pay Period</td>
<td>FY 2015</td>
</tr>
<tr>
<td>Account</td>
<td>Salaries-PT Fac w/o Benefits</td>
</tr>
<tr>
<td>GL Status</td>
<td>Y</td>
</tr>
<tr>
<td>Project</td>
<td>160131Q</td>
</tr>
<tr>
<td>Account</td>
<td>511200</td>
</tr>
<tr>
<td>GL Status</td>
<td>Y</td>
</tr>
<tr>
<td>Transaction Status</td>
<td>0</td>
</tr>
<tr>
<td>FICA Status</td>
<td>M</td>
</tr>
<tr>
<td>Earn Amt</td>
<td>-0.03</td>
</tr>
<tr>
<td>Fringe Amt</td>
<td>0.00</td>
</tr>
<tr>
<td>Tuition Amt</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Save**  **Return to Search**  **Notify**
Section 4: Reports

Monthly Employee Cost Detail

Navigation: Salary Planning Distribution/Reports/Monthly Employee Cost Detail

Purpose: To provide the current salary distribution, by project for an individual employee. The report provides past pay period information and future (planned) salary distribution for an entire fiscal year. You can also run Prior Year Reports.

Recommended Frequency: Report can be run at any time by SPD on-line users. Distributed monthly by the SPD Center by special request.

Selection Criteria Options:

Report Request Parameters:

(i) Report By: Select either GL Org (3 digit Financial Department Number) or Department (also the 3 digit Financial Department Number digit).

Population Selection: Leave at “All” unless you want a specific group for the GL Org or Department selected.

Print Order: Select either by Name; by Non-Student, etc; or by Job Title.
Fiscal Year: Enter fiscal year you desire. This is where you can run prior year reports.

Company and Business Unit: Both should be GT.

ORG ID: When Report by GL Org is selected, then enter your 3 Digit Financial Department Number. **You will get all Employees paid on your Projects**

Dept ID: When Report by Department is selected, then enter same 3 Digit Financial Department Number. **You will get only Employees that belong to your Dept.**

When you have entered/selected the appropriate report parameters ⇒ Click on the Run button on upper right corner of page.

![Process Scheduler Request](image)

Click on **OK** to run report.
### Monthly Employee Cost Detail Report (SPD):

**Title:** Georgia Institute of Technology  
**Department:** Aerospace Engineering  
**Run Date:** 02/02/2016  
**Run Time:** 10:05:51  
**Report ID:** CCI-12345  
**Emp ID:** 99999  
**Monthly/Monthly Rate:** $1,234.56/Month  
**FT%:** 0.40

#### Reports

**SPD USERS MANUAL**  
**Last Update:** 10/2015

**Fund**  
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>160101L</td>
<td>160101M</td>
<td>160101Q</td>
</tr>
<tr>
<td>Account/Obj#</td>
<td>511200</td>
<td>511200</td>
<td>511200</td>
</tr>
<tr>
<td>Program/Drop Desc</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NB_305a</td>
<td>00007012</td>
<td>00007012</td>
<td>00007012</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pay Per Period</th>
<th>Original</th>
<th>Data</th>
<th>Original</th>
<th>Data</th>
<th>Original</th>
<th>Data</th>
<th>Original</th>
<th>Data</th>
<th>Original</th>
<th>Data</th>
<th>Original</th>
<th>Data</th>
<th>Original</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>JUL 1 - 31-JUL-2016</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>AUG 2 - 01-AUG-2016</td>
<td>0.22</td>
<td>0.22</td>
<td>0.22</td>
<td>0.22</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SEP 3 - 01-SEP-2016</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OCT 4 - 01-OCT-2016</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NOV 5 - 01-NOV-2016</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEC 6 - 01-DEC-2016</td>
<td>0.50</td>
<td>0.50</td>
<td>0.50</td>
<td>0.50</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>JAN 7 - 01-JAN-2017</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FEB 8 - 28-FEB-2017</td>
<td>2,216.28</td>
<td>20.907</td>
<td>2,216.28</td>
<td>20.907</td>
<td>2,216.28</td>
<td>20.907</td>
<td>2,216.28</td>
<td>20.907</td>
<td>2,216.28</td>
<td>20.907</td>
<td>2,216.28</td>
<td>20.907</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAR 9 - 21-MAR-2017</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td>2,914.29</td>
<td>20.607</td>
<td></td>
<td></td>
</tr>
<tr>
<td>APR 10 - 12-APR-2017</td>
<td>290.64</td>
<td>2.059</td>
<td>290.64</td>
<td>2.059</td>
<td>290.64</td>
<td>2.059</td>
<td>290.64</td>
<td>2.059</td>
<td>290.64</td>
<td>2.059</td>
<td>290.64</td>
<td>2.059</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAY 11 - 31-MAY-2017</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1,672.02</td>
<td>14.516</td>
<td>1,672.02</td>
<td>14.516</td>
<td></td>
<td></td>
</tr>
<tr>
<td>JUN 12 - 30-JUN-2017</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total**  
7,221.68  
7,221.68  
7,221.68  
17,775.55

To be continued...
Monthly Project Detail - Past Period

Navigation: Salary Planning Distribution/Reports/Monthly Prj Detail-Past Period

**Purpose:** To provide the total amount of Personal Services, Fringe Benefits & Tuition Remission by month and Fiscal Year for each individual employee on a selected project. This report reflects the personal services charges in the accounting periods of which the services were performed.

**Recommended Frequency:** Not distributed. Report can be run at any time by SPD on-line users.

**Selection Criteria Options:**

GL Org and matching Project ID are required. When you have entered/selected the appropriate report parameters

⇒ Click on the Run button in the upper right corner of page.

![Report Request Parameters](image)
### Monthly Project Detail Report – Past Period Applied:

**Employee Name**: [Redacted]

**EMPLOYEE ID**: [Redacted]

<table>
<thead>
<tr>
<th>Project Number</th>
<th>1663206</th>
</tr>
</thead>
</table>

**Project Title**: [Redacted]

**Project End Date**: 06/30/2016

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
<tr>
<td>2016</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>1.00</td>
</tr>
</tbody>
</table>

**Total**:

- **1.00**

---

**SPD USERS MANUAL**

Last Update: 10/2015
**Monthly Project Detail GL - Posting**

**Navigation:** Salary Planning Distribution/Reports/ Monthly Prj Detail-GL Posting

**Purpose:** To provide the total amount of Personal Services, Fringe Benefits and Tuition Remission by month and Fiscal Year for each individual employee on a selected project. This report reflects the personal services charges in the accounting periods to which they are posted to the General Ledger.

**Recommended Frequency:** Report can be run/printed at any time by SPD on-line users.

**Selection Criteria Options:**

GL Org and matching Project ID are required. When you have entered/selected the appropriate report parameters

⇒ Click on the Run button in the upper right corner of page.

---

**Report Request Parameters**

Company: CT, Business Unit: CT

Fiscal Year: 2016

GL Org: 160

Project ID: 1601200

Aerospace Engineering

Enter BOTH GL Org and Project ID
### Monthly Project Detail Report – GL Posting:

**Report ID:** OTCH1MI

**Georgia Institute of Technology**  
**MONTHLY PROJECT COST DETAILS(GL)**

**Fiscal Year 2016 (2015-07-01 through 2016-06-30)**

**UNITS TITLE:** Aerospace Engineering

---

**PROJECT NAME:** \[REDACTED\]

**PROJECT TITLE:** \[REDACTED\]

**PROJECT END DATE:** 06/30/2016

---

**EMPLOYEE NAME**

**FULL/EHL/REV RATE**

---

<table>
<thead>
<tr>
<th>Name</th>
<th>Jul F0</th>
<th>Aug F0</th>
<th>Sep F0</th>
<th>Oct F0</th>
<th>Nov F0</th>
<th>Dec F0</th>
<th>Jan F0</th>
<th>Feb F0</th>
<th>Mar F0</th>
<th>Apr F0</th>
<th>May F0</th>
<th>Jun F0</th>
<th>TOTAL F0</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

---

**SPD USERS MANUAL**  
**Last Update:** 10/2015
Undesignated Sponsored Summary

Navigation: Salary Planning Distribution/Reports/ Undesignated Sponsor Summary

Purpose: To provide the total amount of salaries, by department, that are currently charged to Undesignated Sponsored projects.

Recommended Frequency: Distributed monthly by the SPD Center. Report can be run at any time by SPD on-line users. (However aging will be off if not run at end of month).

Selection Criteria Options:

When you have entered/selected the appropriate report parameters
⇒ Click on the Run button in the upper right corner of page.

![Undesignated Sponsored Summary form](image-url)
## Undesignated Sponsored Summary:

**Department:** Aerospace Engineering

### Expenditures

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Encumbrances</th>
<th>Expenditures</th>
<th>Under 20 Days</th>
<th>20-60 Days</th>
<th>60-90 Days</th>
<th>90-120 Days</th>
<th>Over 120 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>200</td>
<td>Aerospace Engineering</td>
<td>1,981,151.66</td>
<td>44,010.97</td>
<td>0.00</td>
<td>0.00</td>
<td>44,010.97</td>
<td>10,361.99</td>
<td>11,582.07</td>
</tr>
<tr>
<td>210</td>
<td>Electrical &amp; Computer Eng.</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Totals:**

<table>
<thead>
<tr>
<th>Encumbrances</th>
<th>Expenditures</th>
<th>Under 20 Days</th>
<th>20-60 Days</th>
<th>60-90 Days</th>
<th>90-120 Days</th>
<th>Over 120 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,981,151.66</td>
<td>44,010.97</td>
<td>0.00</td>
<td>0.00</td>
<td>44,010.97</td>
<td>10,361.99</td>
<td>11,582.07</td>
</tr>
</tbody>
</table>

**Total Encumbrances:** 1,981,151.66

**Total Expenditures:** 44,010.97
Undesignated Sponsored Detail

Navigation: Salary Planning Distribution/Reports/Undesignated Sponsor Detail

**Purpose:** To provide details to the department for all employees who have personal services that are currently charged to an Undesignated Sponsored project. Charges appearing on this report that are greater than 60 days should be redistributed/reassigned to another project.

**Recommended Frequency:** Distributed monthly by the SPD Center. Report can be run at any time by SPD on-line users (however aging will be off if not run at end of month).

**Selection Criteria Options:**

When you have entered/selected the appropriate report parameters

⇒ Click on the Run button in the upper right corner of page.
### Undesignated Sponsored Detail:

<table>
<thead>
<tr>
<th>EMPLOYEE NAME</th>
<th>EMPL ID/SCON</th>
<th>CLASS</th>
<th>DEPT/STR</th>
<th>PROJECT</th>
<th>UNFUNDED</th>
<th>SPONSORED</th>
<th>50 DAYS</th>
<th>10-50</th>
<th>50-100</th>
<th>100-150</th>
<th>150-200</th>
<th>OVER 200</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>12345</td>
<td>123</td>
<td>ABC</td>
<td>DEF</td>
<td>0.00</td>
<td>100.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Jane Smith</td>
<td>67890</td>
<td>234</td>
<td>XYZ</td>
<td>PQR</td>
<td>0.00</td>
<td>200.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

---

**Reports**

**SPD USERS MANUAL**

Last Update: 10/2015

---

**Georgia Institute of Technology**

**UNDESIGNATED REQUESTED JUSTIFICATION DETAIL REPORT**

**OSID:** 12345

**DEPARTMENT:** Aerospace Engineering

**ADMINISTRATOR:** John Doe

---

**AS OF 02/02/16**

Run Date: 12/01/16

Run Time: 12:00 AM
Monthly Salary Distribution Change Summary

Navigation: Salary Planning Distribution/Reports/Salary Distribution Change Sum

Purpose: To provide the total amount of salary changes for each project

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

When you have entered/selected the appropriate report parameters
⇒ Click on the Run button in the upper right corner of page.
## Monthly Salary Distribution Change Summary:

---

**Report ID:** GT0CR136.SQR  
**Report:** SALARY PLANNING AND DISTRIBUTION SYSTEM REPORT  
**Monthly Salary Distribution Changes Summary**  
**From July to September Fiscal Year 2016**  
**Report Date:** 02/02/2016  
**Run Time:** 11:04:48  
**Department:** Aerospace Engineering

**PeopleSoft Project Account (Object)**  
**Beginning Balance**  
**Change Amount**  
**Ending Balance**

<table>
<thead>
<tr>
<th>PeopleSoft Project#</th>
<th>Account (Object)</th>
<th>Beginning Balance</th>
<th>Change Amount</th>
<th>Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>GIT 1601150</td>
<td>5111100</td>
<td>$4,000.00</td>
<td>($4,183.02)</td>
<td>9,816.18</td>
</tr>
<tr>
<td>GIT 1601150</td>
<td>5111300</td>
<td>30,589.65</td>
<td>0.00</td>
<td>30,589.65</td>
</tr>
<tr>
<td>GIT 1601150</td>
<td>5114300</td>
<td>227,582.07</td>
<td>(146,167.64)</td>
<td>81,394.23</td>
</tr>
<tr>
<td>GIT 1601200</td>
<td>5111100</td>
<td>2,300,972.99</td>
<td>(474,407.14)</td>
<td>1,826,565.85</td>
</tr>
<tr>
<td>GIT 1601200</td>
<td>5112000</td>
<td>0.00</td>
<td>10,841.70</td>
<td>10,841.70</td>
</tr>
<tr>
<td>GIT 1601200</td>
<td>5113000</td>
<td>37,694.75</td>
<td>(5,290.35)</td>
<td>32,404.40</td>
</tr>
<tr>
<td>GIT 1601200</td>
<td>5114100</td>
<td>1,000.00</td>
<td>0.00</td>
<td>1,000.00</td>
</tr>
<tr>
<td>GIT 1601200</td>
<td>5114300</td>
<td>20,200.00</td>
<td>344,501.06</td>
<td>374,301.06</td>
</tr>
<tr>
<td>GIT 1601236</td>
<td>5111100</td>
<td>0.00</td>
<td>20,125.42</td>
<td>20,125.42</td>
</tr>
<tr>
<td>GIT 1601236</td>
<td>5113000</td>
<td>30,122.66</td>
<td>(3,475.78)</td>
<td>26,646.88</td>
</tr>
<tr>
<td>GIT 1601236</td>
<td>5114300</td>
<td>50,200.00</td>
<td>(45,100.00)</td>
<td>5,100.00</td>
</tr>
<tr>
<td>GIT 1601289</td>
<td>5111300</td>
<td>65.00</td>
<td>0.00</td>
<td>65.00</td>
</tr>
<tr>
<td>GIT 1601289</td>
<td>5114100</td>
<td>2,700.00</td>
<td>0.00</td>
<td>2,700.00</td>
</tr>
<tr>
<td>GIT 1601289</td>
<td>5114300</td>
<td>26,640.00</td>
<td>(25,355.71)</td>
<td>1,284.29</td>
</tr>
<tr>
<td>GIT 1601290</td>
<td>5111100</td>
<td>142,925.07</td>
<td>(96,430.47)</td>
<td>46,494.59</td>
</tr>
<tr>
<td>GIT 1601290</td>
<td>5113000</td>
<td>396,138.13</td>
<td>(18,675.75)</td>
<td>377,462.38</td>
</tr>
<tr>
<td>GIT 1601290</td>
<td>5114200</td>
<td>206,929.18</td>
<td>6,647.61</td>
<td>213,576.79</td>
</tr>
<tr>
<td>GIT 1601290</td>
<td>7230000</td>
<td>0.00</td>
<td>62.25</td>
<td>62.25</td>
</tr>
<tr>
<td>GIT 1601300</td>
<td>5111100</td>
<td>1,623,738.12</td>
<td>590,099.98</td>
<td>2,413,838.10</td>
</tr>
<tr>
<td>GIT 1601300</td>
<td>5112000</td>
<td>0.00</td>
<td>189.49</td>
<td>189.49</td>
</tr>
<tr>
<td>GIT 1601300</td>
<td>5113000</td>
<td>12,453.77</td>
<td>0.00</td>
<td>12,453.77</td>
</tr>
<tr>
<td>GIT 1601300</td>
<td>5114000</td>
<td>1,320.00</td>
<td>1,542.04</td>
<td>2,862.04</td>
</tr>
<tr>
<td>GIT 1601300</td>
<td>5114300</td>
<td>83,880.72</td>
<td>1,996.07</td>
<td>84,876.79</td>
</tr>
</tbody>
</table>
Monthly Salary Distribution Change Detail

Navigation: Salary Planning Distribution/Reports/ Salary Distribution Change Dtl

Purpose: To provide a complete description of all salary distribution changes processed during the current reporting period (month) for an operating unit. This report provides departments a record of the changes processed each month.

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

- When you have entered/selected the appropriate report parameters
- ⇒ Click on the Run button in the upper right corner of page.
## Monthly Salary Distribution Change Detail:

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Emp ID / AC#</th>
<th>Period</th>
<th>Account</th>
<th>Beginning Balance</th>
<th>Change</th>
<th>Ending Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>55,955.86</td>
<td>55,955.86</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>10,196.35</td>
<td>10,196.35</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>13,105.77</td>
<td>13,105.77</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>55,955.86</td>
<td>55,955.86</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>10,196.35</td>
<td>10,196.35</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>13,105.77</td>
<td>13,105.77</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>55,955.86</td>
<td>55,955.86</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>10,196.35</td>
<td>10,196.35</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>13,105.77</td>
<td>13,105.77</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>55,955.86</td>
<td>55,955.86</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>10,196.35</td>
<td>10,196.35</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>13,105.77</td>
<td>13,105.77</td>
</tr>
<tr>
<td>XXXX XXXX</td>
<td>P0202X</td>
<td>/ 0</td>
<td>1618850</td>
<td>$1,110.00</td>
<td>55,955.86</td>
<td>55,955.86</td>
</tr>
</tbody>
</table>

SPD USERS MANUAL
Last Update: 10/2015
Salary Distribution Change Summary

Navigation: Salary Planning Distribution/Reports/ Salary Distribution Change Sum

Purpose: To provide the summary total amount of salary changes for each project

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

When you have entered/selected the appropriate report parameters
⇒ Click on the Run button in the upper right corner of page.
### Salary Distribution Change Summary Report:

**Georgia Institute of Technology**  
**Report ID:** OTOC160B  
**Department:** Aerospace Engineering  
**CRS ID:** 160  
**Fiscal Year:** 2016 (07-01 through 06-30)  
**Run Date:** 09/10/2016  
**Run Time:** 13:12:46

<table>
<thead>
<tr>
<th>Project</th>
<th>Change Processed Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001153</td>
<td>(23,201.24)</td>
</tr>
<tr>
<td>1601200</td>
<td>(66,357.01)</td>
</tr>
<tr>
<td>1601204</td>
<td>(20,171.42)</td>
</tr>
<tr>
<td>1601209</td>
<td>(1,408.00)</td>
</tr>
<tr>
<td>1601204</td>
<td>(89,231.28)</td>
</tr>
<tr>
<td>1601200</td>
<td>(162,773.92)</td>
</tr>
<tr>
<td>1601203</td>
<td>6,474.12</td>
</tr>
<tr>
<td>1602002</td>
<td>27,510.92</td>
</tr>
<tr>
<td>1601005</td>
<td>66,207.65</td>
</tr>
<tr>
<td>1601005</td>
<td>157,310.66</td>
</tr>
<tr>
<td>1601202</td>
<td>2,012.92</td>
</tr>
<tr>
<td>1601207</td>
<td>5,435.54</td>
</tr>
<tr>
<td>160201L</td>
<td>(20,154.22)</td>
</tr>
<tr>
<td>160101B</td>
<td>(35,135.66)</td>
</tr>
<tr>
<td>160101E</td>
<td>2,401.06</td>
</tr>
<tr>
<td>160101L</td>
<td>(119.16)</td>
</tr>
<tr>
<td>160101E</td>
<td>1,980.32</td>
</tr>
<tr>
<td>160101D</td>
<td>(756.41)</td>
</tr>
<tr>
<td>160101E</td>
<td>2,553.58</td>
</tr>
<tr>
<td>1601201</td>
<td>21,769.72</td>
</tr>
<tr>
<td>1601387</td>
<td>144,701.80</td>
</tr>
</tbody>
</table>
Salary Distribution Change Detail

Navigation: Salary Planning Distribution/Reports/ Salary Distribution Change Dtl

Purpose: To provide a complete description of all salary distribution changes processed during the current reporting period (month) for an operating unit. This report provides departments a record of the changes processed each month.

Recommended Frequency: Monthly, but can be run at any time by SPD on-line users.

Selection Criteria Options:

When you have entered/selected the appropriate report parameters
⇒ Click on the Run button in the upper right corner of page.

Company: GT  Business Unit: GT
Fiscal Year: 2010
Start Date: 09/01/2015
GL ORG: 160
Aerospace Engineering (Blank for ALL)
## Salary Distribution Change Detail Report:

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name, First Name</th>
<th>Date</th>
<th>Amount</th>
<th>Rate</th>
<th>Payroll Type</th>
<th>Pay Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>023158</td>
<td>Ng, Kenneth Yat</td>
<td>02/01/2015</td>
<td>1,186.88</td>
<td>Carter, James M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>023159</td>
<td>Ng, Kenneth Yat</td>
<td>02/01/2015</td>
<td>825.00</td>
<td>Carter, James M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>023159</td>
<td>Ng, Kenneth Yat</td>
<td>02/01/2015</td>
<td>395.70</td>
<td>Carter, James M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>023159</td>
<td>Ng, Kenneth Yat</td>
<td>02/01/2015</td>
<td>1,186.88</td>
<td>Carter, James M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>049361</td>
<td>Onder, Ryan Daniel</td>
<td>02/01/2015</td>
<td>(2,706.25)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>059294</td>
<td>Sahakian, Hrachia</td>
<td>02/01/2015</td>
<td>(1,596.00)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
<tr>
<td>065522</td>
<td>Chas, Thomas</td>
<td>02/01/2015</td>
<td>(2,166.07)</td>
<td>Carter, Anita M</td>
<td>Payroll Type</td>
<td>Pay Period</td>
</tr>
</tbody>
</table>
**Workload Assignment**

**Workload Assignment Form:**

The Workload Assignment Form is emailed to each employee required to maintain OMB Uniform Requirements Compliance. The email contains a web link and instructions. The employee clicks on the web link, enters his/her GT Account and password to access the report.

The email distribution features a “Submit Changes” action button that opens up email for the employee to send to the appropriate department accountant requesting changes/corrections.

The employee is responsible for reviewing and maintaining the monthly copies along with any other appropriate materials and policies required for A21 Compliance.

The Department can also run the Workload Assignment Form as well from SPD as a backup if the employee looses the report or needs at a later date.
Printed Workload Assignment Report

This Workload Assignment Report has been provided for review, confirmation, and/or correction in accordance to Plan Confirmation System requirements.

1. REVISED Progress and budget to determine if it accurately reflects your current and planned activities.

2. ERRORS: Contact your departmental Financial Manager if:
   a. This workload distribution is not correct (determines % or more of your actual effort).
   b. You are not familiar with one or more of the projects being charged for your efforts.

3. NO ERRORS: Retain a printed or electronic copy of this Workload Assignment Report and any modifications.

4. QUESTIONS: Contact Robert Ellington (S-44140), Grants and Contracts Accounting, if you need information about your responsibilities under the Georgia Tech Flin

---

<table>
<thead>
<tr>
<th>Project</th>
<th>Sponsor</th>
<th>Project Title</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>16011Q</td>
<td>Pratt &amp; Whitney Aircraft/</td>
<td>AUTOCOMPUTATION OF FUEL SPRAY</td>
<td>01-JAN-2016</td>
<td>31-DEC-2016</td>
</tr>
<tr>
<td>16044X</td>
<td>UNDESIGNED</td>
<td>AERO UNDESIGNED FUND METHEANDOSE</td>
<td>01-JUL-2015</td>
<td>30-JUN-2015</td>
</tr>
</tbody>
</table>

---

<table>
<thead>
<tr>
<th>Current Personnel Services Distribution</th>
<th>%</th>
<th>Total</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project 16011Q</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
<td>1.53%</td>
</tr>
<tr>
<td>Project 16044X</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
<td>85.32%</td>
</tr>
<tr>
<td>Project 16065EC</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
<td>0.17%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

---

Return to Table of Contents
Section 5: Tips and Techniques

Helpful Hints!!

- To view by project, enter the new Project /SpeedType Number. To view by person, enter the Employee ID number or name.

- The (Tab) key rather than the (Enter) key is essential to navigation in the SPD Panels.

- A (Shift F4) allows a partial search.

- Account/Object Codes can only be changed via a new PSF Form. PSF Forms submitted to Human Resources will “Drive” the information showing in SPD.

- If an employee has more than one job appointment (as indicated by the job record number), a separate SPD Panel will appear for each job record.

- Use the scroll bar on the Future Pay Period Panel to select the Accounting Period you wish to view.

- If you have any questions regarding SPD Changes, please e-mail spd.ask@business.gatech.edu
**JUSTIFICATION REASONS: **

1. Correction of labor charges based on review by employee, PD/PI, or authorized delegate.
2. Correction of clerical error or data input identified by authorized unit financial personnel.
3. New Award costs incurred during the award period charged temporarily to other allowable funds pending establishment of a new award/fund.
4. Allowable pre-award costs (incurred prior to the award period) initially charged to other allowable funds.
5. Renewal award costs charged originally to prior sponsored increment or to other allowable funds.
6. Other: Specify below

(a) Explain why the expense was not originally charged to the correct project.

(b) Explain how the expense benefits the scope of work on the "TO" project.

**JUSTIFICATION FOR LATE TRANSFER (Complete this section for requests over 90 days, MAIL ORIGINAL DOCS ONLY) **

(c) Explain why the error was not identified and corrected timely (within 90 days of the Pay Period End date).

(d) Explain what steps are in place to prevent the need for a late cost transfer going forward.

** Excludes sponsored projects funded by Georgia Tech Foundation and Georgia Tech Research Corporation. Transfers between projects associated with the same sponsored fund (award) are not subject to special justification requirements or the 90 day limitation.

For Grants & Contracts SPD Center ONLY

<table>
<thead>
<tr>
<th>Changes Entered By:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control Number:</td>
<td>To Project Acctg</td>
</tr>
</tbody>
</table>