The Latest Buzz with G&C Accounting

Thursday, August 26, 2021
1:00 - 2:30PM
# Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome, Research Updates, Grants on the Financial Statements</td>
<td>Josh Rosenberg</td>
</tr>
<tr>
<td>Commitment Accounting Update</td>
<td>Kimberly Short</td>
</tr>
<tr>
<td>Project Accounting Update</td>
<td>Glenn Campopiano</td>
</tr>
<tr>
<td>Pre-Award Expense Grant Line</td>
<td>Doug Feller</td>
</tr>
<tr>
<td>Updates: Effort Reporting, Fringe Rates, Costing</td>
<td>Jonathon Jeffries</td>
</tr>
<tr>
<td>Workday Updates and Reporting Updates</td>
<td>Amy</td>
</tr>
<tr>
<td>Training Update</td>
<td>Josh Rosenberg</td>
</tr>
</tbody>
</table>
Post Award Research Updates

Josh Rosenberg
Sr. Director, Grants and Contracts
Research Trends

Resident Instruction (through July):
• Awards: up $2.0 million (3.6%) to $55.3 million.
• Expenditures:
  • Direct: up $6.1 million (27.2%) to $28.4 million.
  • Indirect: up $1.4 million (17.6%) to $9.7 million.

GTRI (through June):
• Awards: down $22.4 million (30.2%) to $51.7 million (but awards are up big in August).
## RI Expenditures: FY22 v. FY21 YOY

<table>
<thead>
<tr>
<th>Expenditure Analysis: July</th>
<th>FY22 YTD</th>
<th>FY21 YTD</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and Wages</td>
<td>13,411,245</td>
<td>12,179,711</td>
<td>10.1%</td>
</tr>
<tr>
<td>Subcontracts</td>
<td>6,522,145</td>
<td>2,502,106</td>
<td>160.7%</td>
</tr>
<tr>
<td>Other Direct Costs</td>
<td>1,336,455</td>
<td>986,041</td>
<td>35.5%</td>
</tr>
<tr>
<td>Tuition Remission</td>
<td>2,087,210</td>
<td>2,059,103</td>
<td>1.4%</td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td>3,128,083</td>
<td>2,805,476</td>
<td>11.5%</td>
</tr>
<tr>
<td>M&amp;S</td>
<td>1,559,101</td>
<td>1,249,082</td>
<td>24.8%</td>
</tr>
<tr>
<td>Equipment</td>
<td>268,800</td>
<td>490,540</td>
<td>-45.2%</td>
</tr>
<tr>
<td>Domestic Travel</td>
<td>50,014</td>
<td>11,611</td>
<td>330.7%</td>
</tr>
<tr>
<td>Foreign Travel</td>
<td>15,431</td>
<td>2,548</td>
<td>505.6%</td>
</tr>
<tr>
<td>High Performance Computing</td>
<td>982</td>
<td>-</td>
<td>100.0%</td>
</tr>
<tr>
<td>Unallocated</td>
<td>14,849</td>
<td>35,093</td>
<td>-57.7%</td>
</tr>
<tr>
<td><strong>DIRECT</strong></td>
<td>28,394,315</td>
<td>22,321,311</td>
<td>27.2%</td>
</tr>
<tr>
<td><strong>IDC</strong></td>
<td>9,685,775</td>
<td>8,238,531</td>
<td>17.6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>38,080,090</td>
<td>30,559,842</td>
<td>24.6%</td>
</tr>
</tbody>
</table>
Invoices and Financial Reports

• Invoices
  • G&C invoiced $33.2 million in July (FY22) versus $30.6 million in July (FY21). This represents a $2.6 million (or 8.6%) increase.

• Financial Reports
  • 153 so far in FY22 through July.
Grants & Contracts on the Financials

GEORGIA INSTITUTE OF TECHNOLOGY
STATEMENT OF REVENUES, EXPENSES AND CHANGES IN NET POSITION
FOR FISCAL YEAR ENDED JUNE 30, 2020

**Funds:**
- 15000 – Indirect Cost Recoveries (Education & General)
- 15015 – Indirect Cost Recoveries (EII)
- 15021 – Indirect Cost Recoveries (GTRI)
- 20000 – Restricted (Education & General)
- 20100 – Restricted (Student Financial Aid)
- 20300 – Restricted (Research Organization – GTRC)
- 21015 – Restricted (EII)
- 21021 – Restricted (GTRI)

**Ledger Accounts:**
- 421100 – Federal Grants and Contracts
- 421900 – Other Federal Grants and Contracts
- 472100 – Indirect Cost Recovery – Federal
- 422100 – State Grants and Contracts
- 422900 – Other State Grants and Contracts
- 472200 – Indirect Cost Recovery – State
- 423100 – Local Grants and Contracts
- 424100 – Private Grants and Contracts
- 472300 – Indirect Cost Recovery – Local
- 472400 – Indirect Cost Recovery – Private

**Operating Revenues**
- Student Tuition and Fees (net)
- Grants and Contracts
  - Federal
  - State
  - Other
- Sales and Services
- Rents and Royalties
- Auxiliary Enterprises
- Residence Halls
- Bookstore
- Food Services
- Parking/Transportation
- Health Services
- Other Organizations
- Gifts and Contributions
- Endowment Income
- Other Operating Revenues
- Total Operating Revenues

**Geography**
- Federal
- State
- Other
Charges to sponsored projects appear in all of these lines.
Grants & Contracts on the Financials

**NONOPERATING REVENUES (EXPENSES)**

State Appropriations

Grants and Contracts

Federal

Gifts

Investment Income

Interest Expense

Other Nonoperating Revenues (Expenses)

Net Nonoperating Revenues (Expenses)

**Ledger Accounts:**

491100 – G&C Non-Operating

491101 – Federal Pell Non Operating

491102 – Federal SEOG Non Operating

491103 – Federal Work Study Non-Operating

491100 – Federal CARES/HEERF II
Grants & Contracts on the Financials

GEORGIA INSTITUTE OF TECHNOLOGY
STATEMENT OF NET POSITION
JUNE 30, 2020

Funds:
20000 – Restricted (Education & General)
20100 – Restricted (Student Financial Aid)
20300 – Restricted (Research Organization – GTRC)
21015 – Restricted (EII)
21021 – Restricted (GTRI)

Ledger Accounts:
124000 – Receivables – Federal Funds
125002 – Receivables – State Funds
127100 – Receivables – Other
127200 – Receivables – Local Funds
127300 – Receivables – Private Funds
127997 – Clearing – Grants – Unbilled Receivables

Ledger Accounts (Across Fund 15 and 20)
126801 – Due From GTRC
Commitment Accounting
Updates

Kimberly Short, PhD
Commitment Accounting

Institute Budget Planning and Administration
Commitment Accounting

2021 Summer Pay Data Entry Deadlines

<table>
<thead>
<tr>
<th>Summer Pay Month</th>
<th>Deadline for Summer Pay Page Data Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 2021</td>
<td>08/23/2021</td>
</tr>
</tbody>
</table>

At 5:00 p.m. on the deadline date, a process will run that will gray out the data entry fields for that month. Once this process is complete, the Summer Pay data entry field will be disabled for the associated month. Any additional summer pay earnings for that month will need to be manually entered by the payroll department.

If you have questions or concerns, please contact oneusgsupport@usg.edu.
Commitment Accounting

Review FY2022 Position Funding:

• Initial FY2022 position funding in OneUSG determined by annual budget developed in April 2021. If necessary, correct FY2022 funding with a Change Position Funding (CPF) transaction. EDRs should be avoided.

• Review grants that are ending (use Workday end date). Employees paid on grants that have ended will cause funding to post to suspense and will necessitate EDRs (which are to be avoided).

• Review expenses and encumbrances on undesignated and cost overrun worktags.
  • Extend end date or transfer funding to valid funding source
  • Prorate position funding if grant ends in middle of month.

• Establish cost share as soon as possible (ASAP) to avoid over 90 day cost transfer requests.
Commitment Accounting

Beginning July 1, 2021; up to three (3) weeks of paid Parental Leave will be available to state employees as part of House Bill 146. Eligible employees who have their leave requests approved will have their funding for parental leave payments allocated to 03DE00019145 IBPA/Fringe Parental Leave.

The associated earnings codes will be:

<table>
<thead>
<tr>
<th>Group</th>
<th>Associated Earnings Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Exempt for hourly employees</td>
<td>PRH - Parental Leave</td>
</tr>
<tr>
<td>Exempt for monthly employees</td>
<td>PRM - Parental Leave</td>
</tr>
</tbody>
</table>

Please do not change the funding or submit an EDR to transfer parental leave payments from the 03DE00019145 IBPA/Fringe Parental Leave worktag. No further action is required. For additional information regarding parental leave please visit the following link.
Commitment Accounting

Office Hours will now be held once a week every Thursday from 1:00 – 4:00 p.m. via Microsoft Teams until August 26th 2021.

Office Hours can be found on the under the Training Calendar and News & Events.

If you have any questions about the Commitment Accounting Office Hours, please contact erp.training@gatech.edu
Project Accounting Topics

Glenn Campopiano, CRA
Project Accounting
Director of Project Accounting
If you are looking to verify billing to a sponsor there are a few places to look before contacting a G&C Accountant for assistance.

For awards with GTRC as contract entity one can go to “Sponsored Billing Activity”.

You can get there through Contract Information System (CIS) also known as WebWise or through Cognos reporting via GT Crossroads.

If you need to see the actual invoice or find the invoice number (CI-123456) you have to use Workday.

For awards with GIT as contract entity one must use Workday.
Grants and Contracts Accounting

Financial Administration
- 90 Days to expiration report
- Management reports
- Past term report
- PI Review of sponsored expenditures
- PO and Sub recipient encumbrance report
- Sponsored billing

Sponsored Project Management
- Adhoc: On Awards
- Adhoc: on Deliverables
- Adhoc: On Projects
- Adhoc: on Subagreement award revisions
- Adhoc: on Subagreement awards
- Adhoc: on Subagreement requests
- Deliverables report with criteria selection
- Equipment search
- Project closeout checklist
- Sponsored Awards
- Subagreement with criteria selection
- RCR Status Report for PD/PIs
- RCR Status Report for Employees
- RCR Status Reports for Administrators

Proposal Development and Submissions
- Adhoc: On Proposals
- Pending proposals with criteria selection
- Proposal metrics
- Proposal probability
- Proposals with no actions since a specified lag time
## Grants and Contracts Accounting

### Sponsored Billing Activity

**Award/Fund Number:** AWD-002370  
**Old Project Number:** ?  
**Sponsor:** CFD RESEARCH CORPORATION/HUNTSVILLE, AL  
**Start Date:** 03/01/2021  
**Terminated:**

<table>
<thead>
<tr>
<th>Costs</th>
<th>$12,322.64</th>
<th>$7,171.78</th>
<th>$0.00</th>
<th>$0.00</th>
<th>$0.00</th>
<th>$130,841.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overhead</td>
<td>$7,171.78</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,462.30</td>
</tr>
<tr>
<td>Checks</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>Fees</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>FCCoM</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>Charges</td>
<td>$19,494.42</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,462.30</td>
</tr>
<tr>
<td>Invoices</td>
<td>$5,462.30</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,462.30</td>
</tr>
<tr>
<td>VIF Balance</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### Table

<table>
<thead>
<tr>
<th>Date</th>
<th>Cost</th>
<th>Overhead</th>
<th>Checks</th>
<th>Fees</th>
<th>Cost of Money</th>
<th>Invoice</th>
<th>Collection</th>
<th>Write Off</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/31/2021</td>
<td>$3,462.78</td>
<td>$2,009.52</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>06/25/2021</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$5,462.30</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>06/30/2021</td>
<td>$8,869.86</td>
<td>$5,162.26</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>08/06/2021</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>$5,462.30</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$12,322.64</strong></td>
<td><strong>$7,171.78</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$5,462.30</strong></td>
<td><strong>$5,462.30</strong></td>
<td><strong>$0.00</strong></td>
</tr>
</tbody>
</table>
Grants and Contracts Accounting

• In Workday to view the invoices
• Go to award and click on Billing & Receivables tab.
• Click on View Sponsored invoices
• Click on invoice you want to see.
• Click on printing run tab to download pdf of invoice.
• Some awards do not have printable invoices, ask G&C to provide if needed. (SF270, SF1034)
Grants and Contracts Accounting

<table>
<thead>
<tr>
<th>Project #:</th>
<th>Cost Share #:</th>
<th>Doc ID:</th>
<th>Award/Fund #:</th>
<th>Prime Grant #/P/S Project Number:</th>
<th>GR00010258</th>
<th>PeopleSoft Cost Share ID #:</th>
<th>Old P/S Project Number:</th>
<th>PeopleSoft Cost Share Fund Id:</th>
<th>Old Fund Number:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor/division name:</td>
<td><strong>CFD RESEARCH CORPORATION/HUNTSVILLE, AL</strong></td>
<td>Award Period:</td>
<td>01-MAR-2021 to 30-JAN-2022 (Performance)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sponsor Amt</th>
<th>New this change</th>
<th>Total to date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract value:</td>
<td>130,841.00</td>
<td>130,841.00</td>
</tr>
<tr>
<td>Funded:</td>
<td>130,841.00</td>
<td>130,841.00</td>
</tr>
<tr>
<td>Cost Sharing amount:</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Bill To:</th>
<th>Via:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone:</td>
<td>Phone:</td>
</tr>
<tr>
<td>Fax:</td>
<td>Fax:</td>
</tr>
<tr>
<td>Email:</td>
<td>Email:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Copy To:</th>
<th>Second Copy To:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone:</td>
<td>Phone:</td>
</tr>
<tr>
<td>Fax:</td>
<td>Fax:</td>
</tr>
<tr>
<td>Email:</td>
<td>Email:</td>
</tr>
</tbody>
</table>

[Click here to view Sponsor Billing Activity]
Grants and Contracts Accounting

```
<table>
<thead>
<tr>
<th>Invoice</th>
<th>Invoice Status</th>
<th>Award Billing Sequence Number</th>
<th>Adjustment Reason</th>
<th>Invoice Type</th>
<th>Invoice Date</th>
<th>Invoice Amount</th>
<th>Amount Due</th>
<th>Currency</th>
<th>Due Date</th>
<th>Invoice Followup Date</th>
<th>Is On Hold</th>
<th>Collection Code</th>
<th>Dispute Reason</th>
<th>Payment Status</th>
<th>Payment Type</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Invoice: CI-00035248</td>
<td>Approved</td>
<td></td>
<td></td>
<td>G&amp;C GTRC Standard Certification Required</td>
<td>06/25/2021</td>
<td>5,462.30</td>
<td>0.00</td>
<td>USD</td>
<td>06/25/2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Paid</td>
</tr>
<tr>
<td>Customer Invoice Adjustment CI-00035248GR</td>
<td>Approved</td>
<td></td>
<td></td>
<td>GTRC Invoice Adjustments</td>
<td>06/30/2021</td>
<td>(5,462.30)</td>
<td>0.00</td>
<td>USD</td>
<td>06/30/2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Paid</td>
</tr>
<tr>
<td>Customer Invoice: CI-00038223</td>
<td>Approved</td>
<td></td>
<td></td>
<td>G&amp;C GTRC Standard Certification Required</td>
<td>08/18/2021</td>
<td>26,354.10</td>
<td>26,354.10</td>
<td>USD</td>
<td>08/18/2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Unpaid</td>
</tr>
</tbody>
</table>
```
### Grants and Contracts Accounting

<table>
<thead>
<tr>
<th>Customer Invoice Printing Run</th>
<th>Printed Date</th>
<th>Print Run Type</th>
<th>Print Status</th>
<th>Delivery Method</th>
<th>Customer Invoice</th>
<th>Attachments Printed With Invoice</th>
<th>Run by</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>06/25/2021 12:11:16 PM</td>
<td>Final</td>
<td>Completed</td>
<td>Mail</td>
<td></td>
<td>CI-00035248 2021-06-25.pdf</td>
<td>Ivey LaTrelle Bell</td>
</tr>
</tbody>
</table>
Doug Feller
Project Accounting
G&C Interim Financial Manager
Pre-Award Expense Grant Line

• Georgia Tech has expanded authority to manage Federal Awards

• Approval has been waived for 90-day pre-award expenses

• Agencies include:
  • NSF, Dept. of Energy, NIH, USDA NIFA, Dept. of Commerce, and NASA
Pre-Award Expense Grant Line

- New process established by the G&C Project Accounting; add a pre-award grant line if the award meets certain criteria

- G&C will monitor expenses posted on pre-award grant line and determine if expenses are allowable
  - 2 CFR 200.458 – Definition of pre-award costs

- Goal: Allow departments to charge allowable pre-award expenses on projects and begin work as soon as possible
Pre-award Expense Grant Line Criteria

• Award must be from the following sponsors
  • NSF, Dept. of Energy, NIH, USDA NIFA, Dept. of Commerce, and NASA

• Award must be fully executed by OSP
  • Note: Advance award requests are when the award has not been fully executed by OSP; department is confident it will be awarded

• Award must integrate into Workday before the award’s official start date
  • Ex: Integrates on 10/1/21 but the official start date is 12/1/21
Grant Line Attributes

• Grant line will have a 90 day project period

• Grant line will change to “Closeout” status after the official start date begins
  • All expenses must be charged to the prime grant after the 90 day pre-award period
  • Prime grant is create at the same time as the pre-award expense grant line

• Pre-award expenses will be billed after the award’s official start date
Jonathon Jeffries, CPA
Director of Cost Accounting
Effort Reporting – ASRs (Annual Statement of Reasonableness)

• Currently available for online certification
  
  • UFMs are assigned based on department that owns the position in OneUSG, not based on Grant department

• ASRs deadline is August 31\textsuperscript{st}
  
  • May extend an extra week due large number of ASRs outstanding
  
  • Manual ASRs will be distributed electronically due to Campus Mail issues
Effort Reporting – ASRs (Annual Statement of Reasonableness)

- **Manual ASRs**

- Certifications for limited circumstances, normally due to system access or errors on ASR
  - Approved First Hand Knowledge - Supervisor, PI, or Department/Organizational Head
  - Unit Financial Manager signs confirming overall salary not workload distribution for employee
  - Employee **should** electronically sign if possible
  - Complete ASAP- Required Audit Documentation
SCARV – Service Center Annual Rate Validate

• Sent this week to department contacts

• Due September 30th with supporting documentation

• SCAV forms slightly updated with a completed example and instructions

• Reported usage should tie to total collected revenue, free use must be reported on SCARV

• Questions - servicecenter.ask@lists.gatech.edu or andrew.chung@business.gatech.edu
Year End Date Issues

• Do not change worktags related to Driver (this included fund, class, cost center, and function)

• NIH Cost Share must be linked to the Award

  • Changing the fund on Grant does not create Cost Share, must be separate Grant Line

• Gifts Worktags (GTF and GTRC) require the Gift as a related worktag, do not delete the Gift Worktag
Workday Grants Reporting

Amy Zhang
Application Support Analyst Lead
Grants and Contracts Accounting
How to request Workday Security Roles

https://gatech.service-now.com/home

Home → Financial Services → Workday App Security → Workday Security Roles - Request New and fill out the security form. This will allow the request to go through the normal approval workflow process.

- New employees have to be put in the HR system before you can send a request for Workday security.
- Their name appears in Workday through an automated process that sends their information from HR to Workday.

Workday App Security

Access • Reports • Integrations

Workday Security Roles - Request New

Request Workday security role (access)
How to request Workday Security Roles

Workday Security Roles - Request New
Request Workday security role (access)

This request initiates changes to current role assignments for Workday application and pre-existing Foundation Data Model (FDM) values. Please note that all GT employees are provided access to Workday upon hire with the following security roles: Employee as Self; Cost Center Financial Analyst.

*Requested By
Ming Zhang (Grants & Contracts Accounting)

*Preferred Contact Method
Email

*Requested For

*Supervisor
The supervisor will receive a notification to approve this request upon submission

Required Information
- Requested For
- Supervisor
- Data Stewardship and Policy Compliance

Select what type(s) of roles to add
- Assets
- Cost Center
- Expenses
- Foundation Data Model
- Financial Accounting
- Grants
- Gifts
- Procurement

Financial Roles - Grants
Grant SPD Lite
This role gives you access to the Salary Planning and Distribution LITE Report housed on the EDW (Enterprise Data Warehouse).

- Add SPD Lite Role
How to request Workday Security Roles

Grant Manager
This role will serve as the "Spend Approver" for assigned grants. It is typically assigned to administrative personnel and provides access to grant spend analytics as well as approval authority for financial business processes.

☐ Add Grant Manager Role

Grant Principal Investigator
This role is designed for investigators and approvers for assigned grants across one or more award lines. It is typically assigned to faculty members. This role has approval authority for grant award business processes.

☐ Add Grant Principal Investigator Role

GT Sponsored Report Viewer
This role grants user access to additional sponsored reports. It also ensures the user can see appropriate details in sponsored reports within Workday. This role is appropriate for anyone that works with sponsored programs.

☐ Add GT Sponsored Report Viewer Role

Additional Comments
Add additional comments here, or use the paper clip icon to attach a document.
Security Roles for Grant Worktag

-- It is very important that Resident Instruction grants have a PI and a Grant Manager assigned. Missing roles could block an invoice from being routed.

-- The Grant Manager can not be the same as the Grant PI. The approval routing will be incomplete without two different users in these roles.

-- Our Project Accounting team and system team are constantly monitoring these security roles to ensure the grant manager and grant PI are correctly assigned. Your support may be needed to identify the proper users for assignment.
G&C on Workday 2021R2 Release

-- Workday releases enhancements to functionality twice per year. G&C system team has been testing the 2021R2 release.

-- We have tested Award Setup, Award Billing, Role Assignment, some Customer Reports and Business Processes

-- A couple changes of the new release are
• The search bar is located in the center top of the home page, and the search font is now default to bold

• The report or task prompt will display as a pop up window instead of a separate page. This allows you input your search criteria directly and saves some time.
  • Click Report in search bar drop down
  • Click Report in Search Results panel
  • Create Budget Amendment
  • Create Customer Invoice for Billing Installment
G&C on Workday 2021R2 Release
Training Update

Josh Rosenberg
Sr. Director, Grants and Contracts
Week 1:

**Friday, August 27**
- CRA Study Session, (Hybrid)
  - Fridays, 12:30pm - 2:00pm

**Thursday, September 9**
- Finding Funding and Submission Process, (virtual)
  - 7:00pm - 8:00pm

**Tuesday, September 14**
- Subawards: Request, Monitoring and Risk, (Hybrid)
  - 1:00pm - 3:30pm

**Wednesday, September 15**
- GT Basic Certification Workshop, (Hybrid)
  - 9:30am – 3:00pm

**Tuesday, September 21**
- Post-Award & Compliance Part 1, (Hybrid)
  - 1:00pm – 3:30pm

Week 2:

**Wednesday, September 22**
- Post-Award & Compliance Part 2, (Hybrid)
  - 9:30am – 12:00pm

**Thursday, September 23**
- Annual Celebration of Research Administration Appreciation Day, (Hybrid)
  - 9:00am - 11:00am

**Tuesday, September 28**
- eRouting Proposal Module, (Hybrid)
  - 10:00am – 11:30am

**Wednesday, October 2**
- Pre-Award Part 2, (Hybrid)
  - 9:30am – 12:00pm

**Thursday, October 6**
- GT Basic Certification Workshop, (Hybrid)
  - 9:30am – 3:00pm

Week 3:

**Thursday, October 7**
- Service Centers and Best Practices, (Hybrid)
  - 10:00am - 11:30am

**Tuesday, October 12**
- Finding Funding and Submission Process, (virtual)
  - 7:00pm - 8:00pm

**Wednesday, October 13**
- Research Admin Buzz Meeting, (virtual)
  - 11:00am - 1:00pm

**Wednesday, October 27**
- 2 CFR 200 Workshop, (Hybrid)
  - 9:00am - 4:00pm

Week 4:

**Thursday, October 28**
- eRouting Proposal Module, (Hybrid)
  - 10:00am – 11:30am

**Wednesday, November 3**
- Internal Controls Workshop, (Hybrid)
  - 9:30am - 3:00pm

**Friday, November 5**
- NIH Proposal Preparation & Review Tips, (Hybrid)
  - 9:00am – 10:30am

**Thursday, November 11**
- NIH F Series--Fellowship Programs, (Hybrid)
  - 10:45am – 11:45am

Week 5:

**Tuesday, November 9**
- Post-Award & Compliance Part 3, [Advanced]
  - 1:00pm - 3:00pm

**November 10**
- Post-Award & Compliance Part 1, (Hybrid)
  - 9:30am – 12:00pm

**November 16**
- Finding Funding and Submission Process, (virtual)
  - 7:00pm - 8:00pm

Week 6:

**Wednesday, November 17**
- Post-Award & Compliance Part 2, (Hybrid)
  - 9:30am – 12:00pm
The Latest *Buzz* with G&C Accounting

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THANK YOU

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