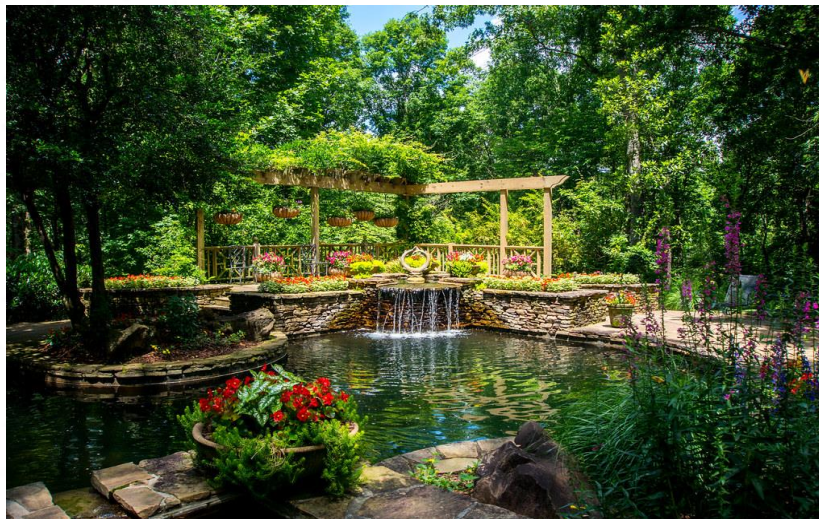


The Latest Buzz with G&C Accounting

Wednesday, March 30, 2022

1:00 – 2:30 PM



Agenda

| Topic | Presenter(s) |
|--|-------------------|
| Welcome, Post Award Research Updates | Josh Rosenberg |
| Commitment Accounting Updates | Terryl Barnes |
| Project Accounting Updates | Glenn Campopiano |
| Cost Accounting and Compliance Updates | Jonathon Jeffries |
| Workday Reporting Updates | Amy Zhang |
| Training Updates | Rob Roy |
| Closing | Josh Rosenberg |

Post Award Research Updates

Josh Rosenberg

Sr. Director, Grants and Contracts

RI Sponsored Programs

AWARD DATA: FY18 – 22 (YTD through Period 8: February)

| AWARDS: Cumulative Report thru: FEBRUARY | | | | | |
|--|----------------------|--------------|----------------------|--------------|-----------------------|
| College/Unit | FY22 | | FY21 | | Award Dollar Variance |
| | Awarded Amount | Awards | Awarded Amount | Awards | |
| COMP | \$21,006,379 | 111 | \$21,474,030 | 127 | -2.2% |
| COS | \$47,709,397 | 251 | \$39,098,646 | 223 | 22.0% |
| DSGN | \$9,964,240 | 468 | \$9,390,818 | 465 | 6.1% |
| ENGR | \$196,276,306 | 850 | \$174,517,787 | 827 | 12.5% |
| GTRI | \$579,753,543 | 581 | \$529,581,858 | 563 | 9.5% |
| IAC | \$3,393,954 | 24 | \$3,857,613 | 34 | -12.0% |
| OTHERS | \$54,598,750 | 244 | \$29,465,473 | 212 | 85.3% |
| SCB | \$553,600 | 6 | \$367,500 | 2 | 50.6% |
| Total | \$913,256,169 | 2,535 | \$807,753,725 | 2,453 | 13.1% |
| Resident Instruction and Other | \$333,502,626 | 1,954 | \$278,171,868 | 1,890 | 19.9% |

| Awards | | |
|--------|----------------|----------------|
| | YTD (Feb.) | Full Year |
| FY22 | \$ 333,502,626 | \$ 491,118,976 |
| FY21 | \$ 278,171,868 | \$ 415,738,536 |
| FY20 | \$ 260,560,278 | \$ 402,520,391 |
| FY19 | \$ 287,652,561 | \$ 406,662,163 |
| FY18 | \$ 245,519,909 | \$ 354,545,260 |

Key Takeaways:

- February continued to reflect very strong growth in RI awards.
- The colleges of Engineering and Sciences led the way, with combined growth of over \$30 million YOY.
- GTRI numbers reflect growth of over 9% in awards YOY.

RI Sponsored Programs

SPONSOR AWARD DATA: FY21 – 22 (YTD through Period 8: February)

| RI NEW AWARDS (Through February) | | | | | | |
|---|-------------|--------------------------|-------------|-----------------------------|----------------------------|-------------------|
| Federal Agency or Sponsor Type | FY22 | % of RI Portfolio | FY21 | 22 v. 21 \$ Variance | 22 v. 21 % Variance | 5 Year Avg |
| NATIONAL SCIENCE FOUNDATION (NSF) | 74,004,533 | 22% | 43,485,866 | 30,518,667 | 70% | 62,265,517 |
| INDUSTRIAL SPONSORS | 51,282,715 | 15% | 44,687,642 | 6,595,074 | 15% | 44,136,137 |
| INDUS RES INST/FDNS/SOC | 40,396,226 | 12% | 24,963,634 | 15,432,591 | 62% | 24,073,809 |
| DHHS | 32,853,286 | 10% | 33,922,499 | (1,069,212) | -3% | 29,676,783 |
| COLL/UNIV/RES INST | 29,374,583 | 9% | 32,480,743 | (3,106,160) | -10% | 31,540,180 |
| US DEPT OF ENERGY | 24,435,628 | 7% | 24,633,334 | (197,706) | -1% | 18,663,529 |
| US DEPT OF EDUCATION | 18,550,955 | 6% | 3,879,000 | 14,671,955 | 378% | 5,553,291 |
| NASA | 13,759,682 | 4% | 7,865,133 | 5,894,549 | 75% | 9,556,207 |
| NAVY | 7,954,740 | 2% | 4,994,437 | 2,960,303 | 59% | 9,992,339 |
| US DEPT OF COMMERCE | 7,653,425 | 2% | 6,755,072 | 898,353 | 13% | 6,228,229 |
| GOVT-OWNED/CONTRACTOR OP | 6,760,050 | 2% | 8,126,881 | (1,366,831) | -17% | 6,738,519 |
| US DEPT OF TRANSPORTATION | 6,221,467 | 2% | 8,304,207 | (2,082,740) | -25% | 4,286,961 |
| AIR FORCE | 6,021,754 | 2% | 5,492,021 | 529,733 | 10% | 8,483,452 |
| ARMY | 3,981,441 | 1% | 5,118,494 | (1,137,053) | -22% | 3,847,988 |
| STATE & LOCAL GOVERNMENT | 3,127,706 | 1% | 6,117,128 | (2,989,422) | -49% | 6,169,617 |

Key Takeaways:

- 98% of RI sponsored funding comes from the 15 agency/sponsor types listed above.
- Our largest area of growth this year continues to come from NSF awards.
- Through February, we continue to outpace both FY21 and 5-year averages across our sponsors.

RI Sponsored Programs

EXPENSE DATA: FY18 – 22 (YTD through Period 8: February)

| Expenditure Analysis: Feb. | FY22 YTD | FY21 YTD | Change |
|----------------------------|--------------------|--------------------|--------------|
| Salaries and Wages | 85,718,650 | 78,758,085 | 8.8% |
| Other Direct Costs | 37,053,193 | 27,676,733 | 33.9% |
| Subcontracts | 38,744,647 | 30,580,231 | 26.7% |
| Fringe Benefits | 16,241,549 | 15,804,283 | 2.8% |
| Tuition Remission | 22,928,701 | 19,936,859 | 15.0% |
| M&S | 17,308,859 | 11,663,415 | 48.4% |
| Equipment | 3,543,531 | 5,725,884 | -38.1% |
| Domestic Travel | 1,103,857 | 83,447 | 1222.8% |
| Foreign Travel | 191,536 | 31,755 | 503.2% |
| Unallocated | 431,162 | 498,701 | -13.5% |
| High Performance Computing | 23,055 | | 100.0% |
| DIRECT | 223,288,741 | 190,759,394 | 17.1% |
| IDC | 59,052,701 | 54,370,848 | 8.6% |
| Total | 282,341,442 | 245,130,242 | 15.2% |

| Expenditures - Direct | | |
|-------------------------|----------------|----------------|
| | YTD (Feb.) | Full Year |
| FY22 | \$ 223,288,741 | \$ 336,091,726 |
| FY21 | \$ 190,759,394 | \$ 294,248,586 |
| FY20 | \$ 187,111,727 | \$ 286,744,676 |
| FY19 | \$ 189,644,078 | \$ 279,599,249 |
| FY18 | \$ 181,563,202 | \$ 267,645,605 |
| Expenditures - Indirect | | |
| | YTD (Feb.) | Full Year |
| FY22 | \$ 59,052,701 | \$ 91,470,241 |
| FY21 | \$ 54,370,848 | \$ 86,156,912 |
| FY20 | \$ 56,813,472 | \$ 84,764,909 |
| FY19 | \$ 55,479,763 | \$ 86,087,217 |
| FY18 | \$ 52,651,177 | \$ 82,706,390 |

Key Takeaways:

- Direct expenditures are up 17.1% YOY and indirect expenditures are up 8.6% YOY. The big increase in direct comes from HEERF III student aid distributions.
- Salaries and fringe benefits have increased 8.8% YOY.
- Subcontracts continue to be up significantly.
- Materials and Supplies are up 48.4% YOY.
- Travel expenses have predictably increased significantly as pandemic restrictions have eased.
- Other direct costs are up over 33% due in large part to HEERF III student aid expenditures.

RI Sponsored Programs

Grants and Contracts *INVOICING* and *FINANCIAL REPORTING* FY21 – FY22 (YTD through Period 8: February)

| INVOICING | | | |
|---|------------------------|------------------------|------------------------|
| Invoicing YTD FY2021 vs. FY2022 (thru February) | | | |
| Invoice Types | FY22 (July - February) | Monthly FY22 average | FY21 (July - February) |
| G&C GIT Standard | \$ 1,497,123 | \$ 187,140.37 | \$ 3,055,572 |
| G&C GIT Standard Certification Required | \$ 278,163 | \$ 34,770 | \$ 316,924 |
| G&C GTRC Custom Certification Required | \$ 4,322,998 | \$ 540,375 | \$ 3,820,757 |
| G&C GTRC Standard | \$ 28,733,617 | \$ 3,591,702 | \$ 30,988,828 |
| G&C GTRC Standard Certification Required | \$ 46,920,789 | \$ 5,865,099 | \$ 29,070,117 |
| G&C In House | \$ 35,487,670 | \$ 4,435,959 | \$ 30,002,740 |
| G&C LOC Draw | \$ 90,593,739 | \$ 11,324,217 | \$ 91,597,275 |
| G&C SF1034 | \$ 6,409,990 | \$ 801,249 | \$ 9,888,879 |
| G&C SF 270 | \$ 33,414,104 | \$ 4,176,763 | \$ 35,953,026 |
| Blank | \$ - | \$ - | \$ 123,391 |
| Grand Total | \$ 247,658,193 | \$ 30,957,274 | \$ 234,817,510 |
| Raw Invoice Counts | 9,044 | 1,131 | 9,023 |
| | | | |
| Year over Year Invoicing Change | Dollars* | Invoice Counts* | |
| YTD change in FY22 over FY21 | \$ 12,840,683 | 21 | |
| YTD percentage change | 5.5% | 0.2% | |

| FINANCIAL REPORTS | | |
|---|------------------------|------------------------|
| Financial Reports YTD FY2021 vs. FY2022 (thru February) | | |
| Report Types | FY22 (July - February) | FY21 (July - February) |
| Annual Financial Report | 71 | 103 |
| Final Financial Report | 97 | 154 |
| Financial Report Conversion/Milestone | - | 3 |
| Monthly Financial Report | 88 | 121 |
| Quarterly Financial Report | 412 | 288 |
| Semi-Annual Financial Report | 22 | 22 |
| Revised Financial Report | 4 | 2 |
| TOTALS | 694 | 693 |
| | | |
| Year over Year Invoicing Change | Report Counts | |
| YTD change in FY22 over FY21 | 1 | |
| YTD percentage change | 0.1% | |
| The FY22 totals have been adjusted (the quarterly report total was overstated in January) | | |

RI Sponsored Programs

Award Dollars in Exception Status

| AWARD EXCEPTIONS (Overspent) - As of March 1 | | | |
|---|--------------------|-----------------------|---------------------|
| Top 15 Departments (Areas) | Past-term | In-Performance | Grand Total |
| MECHANICAL ENGINEERING | (1,134,962) | (1,067,524) | (2,202,486) |
| AEROSPACE ENGINEERING | (771,253) | (922,400) | (1,693,653) |
| ELEC AND COMPUTER ENGR | (669,805) | (1,445,017) | (2,114,822) |
| (blank) | (319,665) | (12,182,441) | (12,502,107) |
| BIOENGINEERING & BIOSCIENCE | (297,352) | (356,052) | (653,404) |
| COMPUTER SCIENCE | (257,105) | (856,607) | (1,113,713) |
| INDUSTRIAL AND SYSTEMS ENG | (239,142) | (164,017) | (403,159) |
| CHEMISTRY AND BIOCHEMISTRY | (83,084) | (327,082) | (410,166) |
| PSYCHOLOGY | (82,981) | (279,450) | (362,431) |
| BIOMEDICAL ENGINEERING | (80,177) | (718,490) | (798,668) |
| CHEMICAL & BIOMOLECULAR ENGINEERING | (77,060) | (589,164) | (666,224) |
| INTERACTIVE COMPUTING | (75,854) | (266,387) | (342,241) |
| CIVIL & ENVIRONMENTAL ENGINEERING | (49,515) | (588,374) | (637,889) |
| MATERIALS SCIENCE AND ENGR | (48,098) | (381,005) | (429,103) |
| EII - ENTERPRISE INNOVATION INSTITUTE | (37,877) | (554,432) | (592,309) |
| Grand Total | (4,307,235) | (21,439,752) | (25,746,987) |

Key Takeaways:

- This data represents awards where actual spending plus obligations and commitments exceeds the current budget.
- The biggest risk area is dollars associated with “past-term” awards (the end date has passed).
- Last month, there was over \$4.9 million in the past-term category. This month, the number is down to \$4.3 million – a decrease of 12%.
- While the award is still “in-performance,” there may be budget modifications forthcoming and other adjustments.
- Each month, Grants and Contracts provides exception reports at both the award and individual grant level to unit financial managers.
- We are in the process of developing reports in LITE that can easily be run by unit financial managers themselves which will track these exceptions “real-time”we hope to roll these out to campus by the end of March.

Custom Validations – WD

| Proposed new Award End Date Custom Validations | | | | |
|--|------------------------------|------------------------------|--|--|
| Group | Use | Critical (Work stopper) | Pending Termination Warning | Post term Warning |
| AP | Supplier Invoice | >=45 day past award end date | between 90 and 1 day before award end date | between 1 and 45 days > award end date |
| AP | Supplier Invoice Adjustment | >=45 day past award end date | between 90 and 1 day before award end date | between 1 and 45 days > award end date |
| Expense | Spend Authorization | >=45 day past award end date | between 90 and 1 day before award end date | between 1 and 45 days > award end date |
| Expense | Expense Report | >=45 day past award end date | between 90 and 1 day before award end date | between 1 and 45 days > award end date |
| Pcard | Procurement Card Transaction | >=45 day past award end date | between 90 and 1 day before award end date | between 1 and 45 days > award end date |
| Procure | Change Order | >=1 day trigger | between 90 and 1 day before award end date | |
| Procure | Purchase Order | >=1 day trigger | between 90 and 1 day before award end date | |
| Procure | Requisition | >=1 day trigger | between 90 and 1 day before award end date | |
| Journals | Accounting journal | >=45 day past award end date | between 90 and 1 day before award end date | between 1 and 45 days > award end date |
| | | | | |
| Current Award end Date Custom Validations | | | | |
| Group | Use | Critical (Work stopper) | Warning | Warning |
| AP | Supplier Invoice | >= 75 day past term | No Validation | |
| AP | Supplier Invoice Adjustment | >= 75 day past term | No Validation | |
| Expense | Spend Authorization | No Validation | No Validation | |
| Expense | Expense Report | >= 75 day past term | between 30 and 1 day before award end date | between 1 and 75 days > award end date |
| Pcard | Procurement Card Transaction | >= 60 day past term | between 30 and 1 day before award end date | |
| Procure | Change Order | >= 1 day past term | between 30 and 1 day before award end date | |
| Procure | Purchase Order | >= 1 day past term | between 30 and 1 day before award end date | |
| Procure | Requisition | >= 1 day past term | between 30 and 1 day before award end date | |
| Journals | Accounting journal | >=75 day past award end date | between 30 and 1 day before award end date | between 1 and 75 days > award end date |

Commitment Accounting Updates

Terryl Barnes

Commitment Accounting Mgr

Encumbrance Process Updates

| Pay Group | Pay Group Title | Update |
|-----------|----------------------------|---------------------------------|
| 03C | Temporary Staff Biweekly | Pay group now encumbered |
| 03L | Temporary Salaried Monthly | Pay group now encumbered |
| 03F | Academic Year Faculty | Supplemental pay now encumbered |

Managers: Change Positing Funding transaction attachment functionality

Current

Employee Self Service

Change Position Funding

Home

Search

Alert

More

New Distribution

1 of 1

View All

Effective Date

Delete from DBE: ☐

New Information

Current

| | Earnings Code | Combination Code | Funding End Date | *Percent of Distribution | ChartField Details | | |
|---|----------------------|------------------|----------------------|--------------------------|------------------------------------|----------------------------------|----------------------------------|
| 1 | <input type="text"/> | | <input type="text"/> | <input type="text"/> | ChartField Details | <input type="button" value="+"/> | <input type="button" value="-"/> |

Add comments:

Submit

Release 6.30

Employee Self Service

Change Position Funding

Home

Search

Alert

More

New Distribution

1 of 1

View All

Effective Date

Delete from DBE: ☐

New Information

Current

| | Earnings Code | Combination Code | Funding End Date | *Percent of Distribution | ChartField Details | | |
|---|----------------------|------------------|----------------------|--------------------------|------------------------------------|----------------------------------|----------------------------------|
| 1 | <input type="text"/> | | <input type="text"/> | <input type="text"/> | ChartField Details | <input type="button" value="+"/> | <input type="button" value="-"/> |

Add comments:

Submit

File Attachment

Attached File

Driver Worktags and Related Worktags

- Driver worktags with a function = FN18100 Scholarships/FN18200 Fellowships won't appear in OneUSG since salaries aren't allowable on fellowship/scholarship worktags
- Related worktags on a driver worktag must not be changed. A new driver worktag should be created.
 - When a related worktag is changed on a driver worktag, This creates a duplicate worktag in OneUSG Connect and causes processes to fail.
- Cost Share grants should have a class code and function that begins with 1.
 - Cost share worktags with a class code beginning with 6 (sponsored operations) will break a workday custom validation.

FY2022 4th Quarter Undesignated Funding

- Beginning April 2022
- Reduce burden at fiscal year end
- Positions funded to undesignated worktags will be funded to cost overrun for the remainder of FY2022.
- Submit Change Position Funding (CPF) transactions to fund positions appropriately before payroll processing
- Avoid transferring funding back to undesignated worktags.
 - A CPF/EDR transaction would have been needed to transfer salary from undesignated regardless.

Project Accounting Updates

Glenn Campopiano, CRA

Director, Project Accounting

90 Days to Year End!

Check list for several important things to do before year end

- FY22 & FY23 \$5,000 COLA Increase. Please review all sponsored awards and adjust expenses and encumbrances to include the COLA increase on employees paid on soft money for FY22. Do not overrun your awards. Revise any proposal budgets that you are working on with the new salary amounts.
- GRA/GTA graduating in May, terminating or going on internship. Please put in termination dates for those leaving end of semester. Let's avoid salary overpayments and adjust sponsored awards as required.
- Cost Share – please review your FY22 cost share commitments and expenses. Now is the time to adjust.
- The Undesignated worktag – please start clearing the undesignated so no one remains by close of fiscal year.

90 Days to Year End!

Check list for several important things to do before year end

- Prior year PS cost transfers – G&C is seeing year over year increases to requests for prior year salary cost transfers. Let's review our PS loading now and try not to have any prior year cost transfers in FY23. We know some are unavoidable but most could have been handled in the current fiscal year.
- Remember CT from prior year state funds to sponsored are not allowed.
- Sponsored awards ending by June 30 – please review and true up so they can close out without issue. Any M&S purchases should all be completed by now. Close open obligations if you can.

90 Days to Year End!

Check list for several important things to do before year end

- Subawards – if ending soon please request final invoices. Please have sub-award monitoring documentation readily available and filed for future inquiry if requested. Document meetings, strategy sessions, emails and payment approvals to prove monitoring was in place during performance of sub award.
- Cost share provided by subs – report third party cost share as received to G&C so it can be posted to cost share worktag.

Cost Accounting and Compliance Updates

Jonathon Jeffries

Director of Cost Accounting

Compliance/ Audit Update

Recently Completed Program Reviews

- Overall impressed with reporting and communication between Programmatic and Technical Side
- Makes sure department has regular communication with PI; particularly as awards approach end date
- Make sure sub awards are budgeted correctly and approved by sponsor
 - Correct budget categories impacts F&A calculation

Sandia Audit

- Ongoing audit with new auditor
- New list of question requesting justifications for changes in budget categories
- Grants and Contract will reach out to department as needed after initial review
- Closely monitor budget by object class for Sandia
 - Document, Documents, Document any changes to budget

Fiscal Year 2022 Space Survey

- Biennial study to determine research labs supporting Organized Research (Grant Worktags)
- Departments with a large amount of grant expenditures and/or research laboratory space will be included in survey
- Room-by-room information is collected (room type, ASF, occupying department)
- Research laboratories and space supporting those labs require additional information
 - Functional usage (percentage Grants, Department Research, Instruction, Other)
 - Principle Investigator and Grant Worktags associated with space
 - Expenditures should align with space
- All remaining space is allocated based on department salaries and wages
- Training will be provided by Grants and Contracts and Infrastructure and Sustainability in April

Workday Reporting Updates

Amy Zhang

Application Support Analyst Lead

New to G&C Web

PI Articles is in G&C website

<https://www.grants.gatech.edu/pi-articles>

G&C Home → Resources → PI Articles

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PI Articles

My sponsor says they haven't been invoiced.....so w

[Grants and Contracts \(G&C\) Accounting](#) is the central research administration Instruction (colleges and other non-GTRI units at Georgia Tech). This article d date, and what steps you should take if your sponsor contacts you to say they

There are several reasons for a sponsor not receiving an invoice:

Resources

PI Articles

Life Cycle of Award

Federal Research Terms and Conditions

G&C Financial Analyst Assignment List

G&C Accountant Assignments

PI Project Management Reference Manual

COVID-19

invoices to award sponsors on behalf of Resident
ive invoices, how you can see what has been invoiced to

Workday Reporting Update

GT RPT Cost Share Fund in Progress Report

- This report compares the total value of cost share needed and met as of the date entered against the sponsored costs within the same date range.
- The report rolls up all the grant lines for cost share and sponsored costs together.
- The report is helpful to ensure that cost share is being met at the same rate as the sponsored costs.

Workday Reporting Update

GT RPT Cost Share Fund in Progress Report

- The report fields include: Award, Award Sponsor, Award PI, Award G&C Financial Analyst, Award Lifecycle Status, Cost Center, Award End Date, OSP ID, Award Total, Funded amount, Sponsor Expenses, Sponsor Commitments, Sponsor Obligations, Total Sponsored Expenses, Sponsored PCT, Total Cost Share Amount, Cost Share Expenses, Cost Share Obligations, Cost Share Commitments, Total Cost Share Expenses, Cost share PCT, Months Left for Award

GT RPT Cost Share Fund in Progress Report

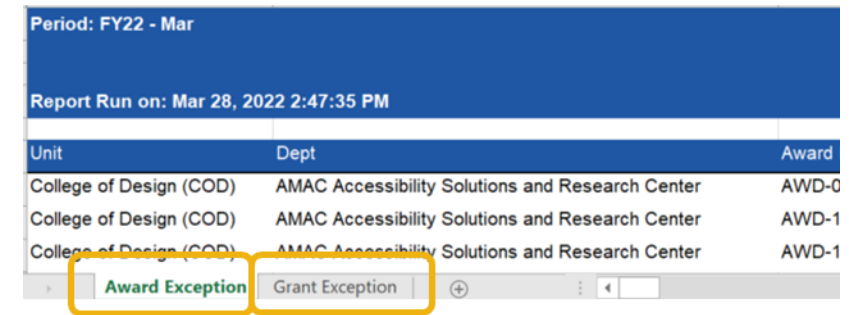
1 item

| Award G&C Financial Analyst | Award Lifecycle Status | Cost Center | Award End Date | OSP ID | Award Total | Funded amount | Sponsor Expenses | Sponsor Commitments | Sponsor Obligations | Total Sponsored Expenses | Sponsored PCT | Total Cost Share Amount | Cost Share Expenses | Cost Share Obligations | Cost Share Commitments | Total Cost Share Expenses | Cost share PCT | Months Left for Award |
|-----------------------------|------------------------|-------------|----------------|--------|----------------|---------------|------------------|---------------------|---------------------|--------------------------|---------------|-------------------------|---------------------|------------------------|------------------------|---------------------------|----------------|-----------------------|
| David Lyons | Active | | 06/04/2022 | | \$1,180,000.00 | 590,000.00 | \$493,532.07 | | \$69,614.68 | \$563,146.75 | 95.45% | \$590,000.00 | \$303,467.35 | \$39,069.68 | | \$342,537.03 | 58.06% | 2 |

LITE Report Update

Awards and Grants Exception Report is in LITE and the link is also available in workday
https://cognos.gatech.edu/ibmcognos/bi/?pathRef=.public_folders%2FFinancials%2FReports%2FGrants%2B%2526%2BContracts%2BException%2BReport

- This report allows department tracking the Actual Spending Exceeding the Budget.
- The report is based on EDW data.
- The report will automatically download to excel file.
- The department can search Awards and Grants exception by Cost Center, Sponsor and Individual Personnel such as PIs, Grant Manager, Financial Analyst/Specialist



Period: FY22 - Mar

Report Run on: Mar 28, 2022 2:47:35 PM

| Unit | Dept | Award |
|-------------------------|--|-------|
| College of Design (COD) | AMAC Accessibility Solutions and Research Center | AWD-0 |
| College of Design (COD) | AMAC Accessibility Solutions and Research Center | AWD-1 |
| College of Design (COD) | AMAC Accessibility Solutions and Research Center | AWD-1 |

Award Exception Grant Exception

Awards and Grants Exception Report

LITE → Financials → Grants & contracts
Award and Grant Exception Report

The screenshot shows the Georgia Tech Enterprise Data Management LITE interface. The top navigation bar includes links for Georgia Tech Home, Campus Map, Directory, and Offices. The main header displays the Georgia Tech logo and 'Enterprise Data Management LITE'. Below the header, there are navigation tabs: Home, LITE Initiative and Documentation, and About Us. A secondary row of tabs includes All Dashboards, Student, HCM, Compliance, Financials (highlighted with a blue border), Space, and Research. Below these tabs, a preview of the 'Grants & Contracts Award & Grant Exception Report' is shown, featuring a table with columns for report details. A callout box at the bottom of the preview identifies the report as the 'Grants & Contracts Award & Grant Exception Report'.

Workday → G&C Dashboard → Custom Reports →
Grants & contracts Award and Grant Exception Report

The screenshot displays the G&C Dashboard interface. The top section is a blue header with the title 'G&C Dashboard'. Below the header, there are four navigation tabs: Standard Reports, Financial Reports, Custom Reports (highlighted with a blue underline), and Systems Team. The main content area lists several options: Data Audit, Extract Grants, Grants & Contracts Award & Grant Exception Report (highlighted with a light gray background), and Extract Awards.

Awards and Grants Exception Report

There are four prompts panels, Date range, Cost center, Sponsors and Award/Grant Personnel Prompts. It selects both Award exception report and Grants exception report by default. The resulting excel file will have two sheets respectively.

This report will be downloaded in Excel format

Grants & Contracts Award & Grant Exception Report

Instructions:

1. Select a Date Range (usually Current Period Life to Date or a Prior Period Life to Date).
2. Select a cost center, or personnel prompts such as Award PI or Grant PI.
3. Choose your selections for your output file: Award Exception, Grant Exception

| Select a Date range | Cost Center Prompts | Sponsors & Award/Grant Personnel Prompts | Select Desired Report Output |
|---|---|--|---|
| <p><i>Only one option can be selected at a time</i></p> <p>* <input checked="" type="radio"/> Current Period (Life to Date) ▼</p> <p>* <input type="radio"/> FY22 - Mar</p> | <p>Search for Cost Center ID or Name</p> <p>Ex: "CC1234 Cost Center Nam" 🔍</p> <p>→</p> <p>←</p> <p><input type="checkbox"/> Select all</p> <p>No Results</p> <p>Starts with any of these keywords ▼</p> <p><input checked="" type="checkbox"/> Case Insensitive</p> <p>Select all Deselect all</p> | <p>Sponsors & Award/Grant Personnel Prompts</p> <p>Award & Grant Personnel ▼</p> | <p>Select Desired Report Output</p> <p><input checked="" type="checkbox"/> Awards Exception Report</p> <p>.....</p> <p><input checked="" type="checkbox"/> Grants Exception Report</p> <p>.....</p> |

Cancel< BackNext >Finish

Date Range

Default view

Select a Date range
Only one option can be selected at a time)

*

* ☒ FY22 - Mar

Other Choices

Select a Date range
Only one option can be selected at a time)

*

* ☐ FY22 - Feb
☒ FY22 - Jan
☐ FY22 - Dec
☐ FY22 - Nov
☐ FY22 - Oct
☐ FY22 - Sep
☐ FY22 - Aug

Select a Date range
Only one option can be selected at a time)

*

Budget & Actuals On or After

*

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | | | | | |

Budgets & Actuals On or Before

*

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

Cost Center Prompts

Search box defaults on “Starts with any of these keywords”, Other choices include “Starts with the first keywords...”, “Contains...”.

Please make sure you use the right arrow to move your selections to the choices pane

Cost Center Prompts

Search for Cost Center ID or Name

Ex: "CC1234 Cost Center Nam"

☐ Select all

No Results

→

←

Starts with any of these keywords **1**

Starts with the first keyword and contains all of the remaining keywords

Contains any of these keywords

Contains all of these keywords

Starts with any of these keywords ^

☒ Case Insensitive

Select all Deselect all

Cost Center Prompts

Search for Cost Center ID or Name

cc00007 **2**

☐ Select all

☐ CC000076 CoD/DBL - Colle

☐ CC000075 CoD/CSPAV - Co

☒ CC000071 CoD/CIDI - Colle

☒ CC000070 CoD/CATEA - Co

☐ CC000079 CoD/SCRIP - Col

☐ CC000078 CoD/SBC - Colle

☐ CC000072 CoD/CMT - Colle

Starts with any of these keywords v

☒ Case Insensitive

Select all Deselect all

Choices:

CC000069 CoD/AMAC - College of

CC000071 CoD/CIDI - College of De

CC000070 CoD/CATEA - College of

← **3** →

Sponsor & Award/Grant Personnel Prompts

Chose from Sponsor, Award PI, Grant PI, Grant Manager, G&C Sponsored accountant, G&C financial analyst and G&C financial specialist

Search box defaults on “Starts with any of these keywords”, Other choices include “Starts with the first keywords...”, “Contains...”.

The diagram illustrates the process of selecting personnel prompts. It begins with a dropdown menu (1) titled "Sponsors & Award/Grant Personnel Prompts" which lists various roles: Sponsor, Award PI, Grant PI, Grant Manager, Award G&C Sponsored Accountant, Award G&C Financial Analyst, and Grant G&C Financial Analyst. A blue arrow points to the next step, a search interface (2) titled "Sponsors & Award/Grant Personnel Prompts". In this interface, the "Grant Manager" role is selected from a dropdown (2). A search box (4) contains the text "Thomas", and a search button (5) is clicked. The search results show a list of names, with "Thomas Orlando" selected. The search criteria are set to "Contains any of these keywords" (3) and "Case Insensitive".

Awards and Grants Exception Report

This report will be downloaded in Excel format

Grants & Contracts Award & Grant Exception Report

Instructions:

- 1. Select a Date Range (usually Current Period Life to Date or a Prior Period Life to Date).
- 2. Select a cost center, or personnel prompts such as Award PI or Grant PI.
- 3. Choose your selections for your output file: Award Exception, Grant Exception

Select a Date range

Only one option can be selected at a time

☒ Current Period (Life to Date)

☐ FY22 - Mar

Search for Cost Center ID or Name

colle of des

☐ Select all

- ☐ CC000083 CoD/SOM - Colle
- ☐ CC000075 CoD/CSPAV - Co
- ☒ CC000071 CoD/CIDI - Colle
- ☐ CC000080 CoD/SID - Colleg
- ☒ CC000069 CoD/AMAC - Col
- ☒ CC000070 CoD/CATEA - Co

Contains all of these keywords

☒ Case Insensitive

Cost Center Prompts

Choices:

- CC000069 CoD/AMAC - College of
- CC000070 CoD/CATEA - Colle
- CC000071 CoD/CIDI - College

Sponsors & Award/Grant Personnel Prompts

Award & Grant Personnel

Select Desired Report Output

☒ Awards Exception Report

☒ Grants Exception Report

Cancel

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Grants & Contracts Exception Report(3).xlsx
Completed — 12.0 KB

Grants & Contracts Exception Report(2).xlsx
Completed — 44.7 KB

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Grants & Contract...xlsx

Training Updates

Rob Roy

Director of BOR Sponsored Programs

Training

Upcoming Spring Semester Classes

[Saba Quest LMS](#) – Sign in with GT credentials and register!

Offered Virtually, via BlueJeans, unless otherwise noted

Events

April 6th

Basic Certification Workshop,
09:00am – 1:30pm **(Virtual)**

April 12th

eRouting Proposal Module,
09:00am – 10:30am **(Virtual)**

April 12th

Post-Award & Compliance Part I,
12:30pm – 3:00pm **(Virtual)**

April 14th

Post-Award & Compliance Part II,
9:30am – 11:00am **(Virtual)**

April 14th

Cayuse Proposal System,
02:00pm – 3:30pm **(Virtual)**

April 20th

Pre-Award Part I,
09:30am – 12:00pm **(Virtual)**

April 21st

Pre-Award Part II,
12:30pm – 3:00pm **(Virtual)**

April 26th

Advanced Topics #3,
9:00am – 11:00am **(In-Person)**

May 3rd

Subawards: Request, Monitor & Risk,
01:00pm – 2:30pm **(Virtual)**

May 10th

Advanced Topics #1,
9:00am – 11:00am **(In-Person)**

May 11th

Basic Certification Workshop,
09:00am – 1:30pm **(Virtual)**

May 12th

Cayuse Proposal System,
09:00am – 10:30am **(Virtual)**

May 17th

2 CFR 200 Workshop,
09:00am – 4:00pm **(Virtual)**

May 24th

Internal Controls Workshop,
09:00am – 3:00pm **(Virtual)**

THANK YOU!



[GRANTS.GATECH.EDU](https://grants.gatech.edu)