2020 Financial Summit

EVENT DATE: TUESDAY, 08 DECEMBER, 2020 - 09:00 AM to 12:15 PM

Posted Questions

[11:43 AM]

anonymous asked: The constant training and re-training is a huge burden, and makes it very difficult for us to do our jobs, both because of the time commitment for the training itself and because of the constantly changing processes and procedures. Who is advocating for the staff to GT and USG leadership?

10 upvotes | 0 answer | 0 reply

Greg Philips answered-

Enterprise Resource Planning team is continually working to balance the requests for continued improvements to system and the supporting mechanisms related to training with the day to day operational demands of our campus. We work with central and distributed offices to best coordinate system change impacts whenever possible to minimize impact. System release timing like that of the announced 6.24 OneUSG Connect Update in March 2021, are often out of our direct control however. We are continuing to advocate for tighter alignment of these release to our campus business cycles and expect the release update timings from OneUSG team to improve as we move forward. We will also be working to improve insight to the roadmap that highlights the coming changes more timely as well.

[10:50 AM]

anonymous asked: Is there any chance of putting in escalating reminders in WD (similar to what was proposed for p-card) to the traveler to remind them to approve their travel? This might help with the 45 days late travel and take the pressure off of financial staff in the units.

9 upvotes | 2 answers | 0 reply

Nate Watkins answered -

This is something Workday is capable of, and we can certainly look into implementing something like this if there's support. We are currently working on a notification that goes to the traveler when the end date of the travel on their spend authorization has passed to remind them to file an expense report.

[10:43 AM]

Julia Thomas asked: Cost center managers/financial personnel do not place the orders. How is this being communicated to the general GT population?

8 upvotes | 1 answer | 0 reply

Ajay Patel answered -

Thanks Julia. We certainly understand that others are placing the orders and then trying to get paid after the fact. AP and Purchasing will ensure that communications are sent out to a broader group to ensure that we reinforce the message. Also as we put out these communications, please also let us know if we have missed out any key stakeholders or feel free to forward.

[11:20 AM]

Kristin Berthold asked: Abbie, someone previously asked when WebNow was going to be sunset. When we first went to WorkDay, it was announced WebNow would no longer be used at some point. But it seems to me we have since identified an ongoing need...???

7 upvotes | 2 answers | 0 reply

Abbie Coker answered -

We are not at a point where Imagenow can retired as of yet but will continue to explore this. In an effort to ensure invoices are accurately integrated into Workday ImageNow is still needed.

Nate Watkins answered -

(safe harbor) In addition, Workday intends to release new supplier invoice functionality over the next year or so that will help streamline the process. As that functionality becomes available we'll review how we can apply it. For example, invoice scanning and image recognition is on the horizon.

[10:09 AM]

anonymous asked: Will parking be refunded for the year for those of us still working from home?

6 upvotes | 1 answer | 0 reply

Beverly Gibson answered -

Good Morning!! We don't have anyone from the Parking Office presenting today so unfortunately, we cannot answer this question. Please reach out to the parking office directly. Thanks!!

[10:43 AM]

anonymous asked: When will the purchasing policies be updated in the policy library? It seems that all of the policies still reference Buzzmart and other outdated processes and procedures.

5 upvotes | 1 answer | 1 reply

Ajay Patel answered -

We have updated and submitted polices for approval prior to WD going live. We are just awaiting the approval. We continue to push to get these approved.

[09:23 AM]

anonymous asked: These are all things that the manager/ provisioned initiator/dept HR can do to make things go well for central HR. What about things that central HR is doing to make it easier/better for us? Timely approvals. DHFs approved that are approved, being entered quickly into the system. Proofing.

3 upvotes | 1 answer | 1 reply

Zachary Rogers answered -

We try to help by sending out communications, updating job knowledge articles, command centers during high volume hiring times, and now we have a dedicated resource for Student Hiring (Diana Robert). Leslie Hall manages the Position Management Team and Charvette Webb manages Talent Acquisition. If you feel like that timelines we give are not followed or you feel that staff are not providing adequate guidance, please reach out to any of us and we will look into it. Thank you

[09:30 AM]

Jennifer Wilson asked: Will we receive a copy of the slides?

3 upvotes | 2 answers | 1 reply

Amy Herron answered -

Hi Jennifer, yes, we will provide a copy of the slides.

[09:37 AM]

Julia Thomas asked: Will Financial Managers be able to run the ASRs throughout the year for those that leave during the year?

3 upvotes | 1 answer | 0 reply

Jonathon Jeffries answered -

Terminating employee ASRs for FY21 will be a LITE report. We will work with the EDM team to see if that is possible.

[10:38 AM]

Preeti Sagar asked: Is there any way to tweak the Pcard editing functionality so that the current load of unverified or in-progress transactions don't get "locked" from editing? Cardholders have mentioned that it's cumbersome to have to start over if they have a draft. Thanks.

3 upvotes | 1 answer | 1 reply

Ajay Patel answered -

Functionality in Workday is very limited for PCard. We (procurement and ERP) continue to engage Workday to help improve the functionality across the P2P platform

[10:40 AM]

anonymous asked: When is WebNow going away? We have new employees that do not have access to WebNow.

3 upvotes | 1 answer | 0 reply

Abbie Coker answered -

Please submit a ServiceNow ticket. You can also contact Jo Keith in PBS

[10:58 AM]

Terry Bunch asked: The questions that I have are -

1. If the invoice is attached in Workday, why do we have to email it to apinvoices also? This is redundant.

2. Do we have to put the PO# on the invoices or not? I don't, but have been told that I need to when there's an invoice that hasn't been paid.

2 upvotes | 1 answer | 0 reply

Abbie Coker answered -

1. Invoices have to be submitted to apinvoices first so they can be integrated into Workday

2. Yes, a PO# has to be referenced on the PO before it is sent to apinovices. AP cannot process invoices that do not have a PO# referenced

[11:48 AM]

anonymous asked: Nate, is there any progress in making the running of reports faster? It easily take 5+ minutes for any given report to run.

2 upvotes | 2 answers | 1 reply

Nate Watkins answered -

In some cases we're investigating reports that are known to take a long time to run. For example, we're redesigning SABER to make it faster. However, most reports are pretty quick to run unless you're running them wide open. You can utilize prompts do narrow results in those cases. Do you have specific reports in mind that have poor performance?

anonymous replied -

SABER is definitely the worst so hopefully that will be updated soon

Nate Watkins answered -

Yeah, we're aware of the SABER issues. It's still in testing, but we're hoping for a January release and a PI-centric version.

[09:39 AM]

Jan Morian asked: Will the PACE info be sent to PIs?

1 upvote | 2 answers | 2 replies

Jonathon Jeffries answered -

The PACE team has been communicating on the research side via listening sessions and other formats. I can provide POC if needed,

Jan Morian replied -

Please! I think this is something our faculty in Interactive Computing would really appreciate this.

Jonathon Jeffries answered -

They have some info on their website here https://pace.gatech.edu/update-gts-research-cyberinfrastructure-cost-model. I would contact Neil Bright there, he is a great resource.

[10:30 AM]

anonymous asked: Can we get help accessing Bank of America for PCard transactions. It was very helpful to see in BOA. It's is difficult working with PCard office not getting password reset.

1 upvote | 1 answer | 0 reply

Ajay Patel answered -

Do you need help accessing Works? B of A normally handles that access but please reach out to me or the PCard office if you are still having issues

[10:40 AM]

anonymous asked: For the new COVID Travel spend authorization in WD: are the travelers themselves ONLY able to submit the spend auth since they have to submit the COVID questionnaire and risk document?

1 upvote | 1 answer | 0 reply

Abbie Coker answered -

The traveler or the expense preparer can create the should submit the spend authorization, however traveler has to complete the COVID acknowledgement and risk forms

[10:49 AM]

Preeti Sagar asked: So, to reiterate, instate travel under 50 miles requires a blank or $0 Spend Auth? Thanks.

1 upvote | 1 answer | 1 reply

Abbie Coker answered -

Depts can submit a blank spend auth to cover a 90 day period for travel less than 50 miles reimbursable travel during the COVID-19 time period.

[11:10 AM]

Kristin Berthold asked: Repeating someone else's parking question from earlier, Carol replied no one from Parking is on this call, so I wanted to share I recently called the Parking Office and, while they are permitting pass cancellations, there are no retroactive refunds,

1 upvote | 2 answers | 0 reply

Zachary Rogers answered -

I also heard that if you cancel your parking permit, you will lose your place in line if your parking lots have waiting lists

[11:50 AM]

anonymous asked: For travel more than 50 miles, if the traveler is driving their own car, will the mileage still be from HQ to destination and back to HQ, or will it be from the employee’s home to destination back to HQ?

1 upvote | 1 answer | 1 reply

Abbie Coker answered -

The mileage will be calculated form their work location. During COVID if the employee's work location is temporarily the home, then mileage will be from there.

[11:52 AM]

Kristin Berthold asked: Lee, you stated you cannot move budget from one gift to another, but what if you have a 7/1/21 DEFICIT budget caused by overspending in the prior year. If the gift is an expendable, no new funds will be awarded to offset the deficit budget. It seems a BA from a discretionary gift should be permitted

1 upvote | 1 answer | 0 reply

Lee Wates answered -

You cannot move the budget between two gifts on the GT side. You have to request that BA directly from the Foundation and they will make the transfer at the foundation since the budgets are actually managed by GTF. You can move the expense between gifts to correct a deficit on the GT side.

[12:09 PM]

Preeti Sagar asked: For the travel Team, please: can approvers attach any missing documents to the travel expense statements? If so, at what stage of the approval?

1 upvote | 1 answer | 0 reply

Nate Watkins answered -

Not the way we currently have it set up, and there are a number of reasons for that. In short, in an approval step the approver can't make any changes. This is mainly for data integrity.

[09:19 AM]

Kristin Berthold asked: Zach - Emergency Off-Cycle "permitted once per year' - per REQUESTOR or per PAYEE ?

0 upvote | 1 answer | 0 reply

Zachary Rogers answered -

Only one per "payee" per calendar year. Regular off-cycles have no limits

[09:21 AM]

anonymous asked: Can biweekly/temps work over GT holiday/winter break? Thanks

0 upvote | 1 answer | 0 reply

Zachary Rogers answered -

Yes, if managers deem it necessary. These employees will be paid holiday and their work hours, unless they want to defer their holidays. There is a job aid for managing deferred holidays if they choose this route.

[09:37 AM]

anonymous asked: How can we get access to get the ASRs. We still have to email to get a copy/

0 upvote | 1 answer | 0 reply

Jonathon Jeffries answered -

If you are set up as an approving ASR UFM the option is in the ASR tile in Techwork. If you need assistance feel free to reach out directly.

[09:38 AM]

Julia Thomas asked: What happens to the equipment that was paid for previously by the departments? Will we be charged for the use now?

0 upvote | 1 answer | 0 reply

Jonathon Jeffries answered -

The PACE team is working with PIs directly on this one.

[09:53 AM]

Gloria asked: Hi Jamie, does the category tuition include only tuition or does it include mandatory fees too?

0 upvote | 1 answer | 0 reply

Jamie Fernandes answered -

This is only tuition! Mandatory fees are in auxiliary and student activities.

[09:56 AM]

anonymous asked: Will GT receive federal or state funding to cover COVID related expenses? If so, when is that expected to be received?

0 upvote | 1 answer | 0 reply

Jamie Fernandes answered -

Unknown at this time. Bills are pending in congress for federal relief.

[10:06 AM]

anonymous asked: Can you please repeat 4 BU DSS Categories? Events/Conferences, International Campuses, and what were last 2?

0 upvote | 1 answer | 0 reply

Nate Watkins answered -

Study abroad and service centers.

[10:21 AM]

Charmain asked: Hello. Who is responsible for creating the POs? It is my understanding that the department creates the RQ and AP generates those POs from the Requisition if there are no issues.

0 upvote | 2 answers | 2 replies

Ajay Patel answered -

Procurement creates PO's.   Some PO's are auto sourced and issued by procurement without a Contracting Officer touching the requisition.

Charmain replied -

Thank you so much. I have a requisition with issues that were resolved, and to date the PO is still not created, so, I was just wondering if there was an action still on me.

Ajay Patel answered -

All requisitions should have notifications updated to list any issues or hangups. Please send the contract officer a notification in the requisition for an update or please send me an email and I will follow up.

[10:33 AM]

anonymous asked: What is the correct link when a supplier need to get documents signed?

0 upvote | 1 answer | 1 reply

Ajay Patel answered -

Please send all agreements or contracts that need to be signed to procurement through Service Now

[10:40 AM]

Preeti Sagar asked: Hi, in addition to upcoming Procurement training, is the websites being updated as well? Thank You.

0 upvote | 1 answer | 1 reply

Ajay Patel answered -

Thanks Preeti -- yes absolutely we are updating our website as we speak. Should be updated within a month. We have also updated policies (although policies are taking a while to be approved) and docs

[10:43 AM]

Preeti Sagar asked: Abbie, do you recommend a PO regardless of amount for goods and/or services? Thanks.

0 upvote | 2 answers | 0 reply

Abbie Coker answered -

Yes please! The PCard should be used for small dollar amounts where applicable.

[10:45 AM]

anonymous asked: If we have an invoice for around $5.00 with no previous PO, do we need to create a PO for it or can we submit as a SIR?

0 upvote | 2 answers | 0 reply

Ajay Patel answered -

The most efficient way to pay this is via a PCard. One caveat though is that the requisition form will be required (unless there is an exemption).

[10:56 AM]

Terry Bunch asked: I've sent invoices to apinvoices that were never paid (the last one hadn't been paid in over a year and I'd sent the info to apinvoices twice). When I contacted ServiceNow to get a status, I was told that I have to put the PO# on the invoice.

0 upvote | 1 answer | 0 reply

Abbie Coker answered -

If invoices do not have a PO# AP is unable to pay the invoice

[11:01 AM]

anonymous asked: To clarify: Travelers are responsible for submitting their own spend authorizations now, so they can sign the travel liability waiver?

0 upvote | 1 answer | 0 reply

Abbie Coker answered -

Travelers or Expense Preparers can still create the spend auth, but only the traveler can complete the COVID forms

[11:01 AM]

Dennis Handy asked: What's the normal turnaround for payments after e-mailing apinvoices@gatech.edu? There have been times I have sent the invoices more than once before the invoices were processed and paid.

0 upvote | 2 answers | 0 reply

Abbie Coker answered -

If an invoice has a PO, receipts have been entered and all necessary requirements have been met the turnaround time for processing an invoice is 5 business days. If all the requirement to process an invoice are not met, the turnaround time to process the invoice is delayed.

[11:09 AM]

anonymous asked: If a PO is a financial commitment to supplier then will Procurement also be required to obtain the approval from the suppliers before they close PO's since depts were asked to obtain the approval from the supplier before we submit any closures to Procurement via change order or to ServiceNow.

0 upvote | 1 answer | 0 reply

Ajay Patel answered -

The purchase orders being closed are either extremely old (in which case the supplier has not fulfilled their obligation to deliver on time) or where items have already been received. and there is just an open encumbrance

[11:09 AM]

anonymous asked: For Frederick- For the example, wouldn't the shipping charge of $84.80 also be rolled into the equipment cost so that the total of both lines would be used for the asset?

0 upvote | 2 answers | 0 reply

Amy Herron answered -

YES, that’s correct. Capital assets must be recorded and reported at their historical costs. Historical costs also include ancillary charges such as freight and transportation charges, site preparation costs and professional fees.

Frederick Trotter answered -

Confirming yes this would be an example of freight charge.

[11:29 AM]

anonymous asked: If surplus items are required to be placed on loading docks but p/u turnaround is two weeks. Has the weather been considered? If an item was classed "Good" it could down grade to "Poor" if bad weather comes.

0 upvote | 2 answers | 0 reply

Amy Herron answered -

The item should not be brought down until the day before or the day of the appointment, once a confirmed appointment has been scheduled with the logistics team.

Frederick Trotter answered -

Surplus items should be placed on load dock once the appointment date has been set. The pick up will occur the "date of" unless very bad weather. Light weather will not impact the pick p. A notification will be sent with an updated pickup date; if the pick up cannot occur as scheduled. Confirming we would not desire equipment to be damaged and will attempt to safeguard personnel and equipment.

[11:32 AM]

anonymous asked: Can depts. with less than 100 assets continue to complete the manual process instead of using the scanners?

0 upvote | 1 answer | 0 reply

Frederick Trotter answered -

For FY21 GT will deploy scanners to account for all inventory. The movement is to capture all assets electronically. Thanks Frederick

[11:37 AM]

anonymous asked: What are the parameters for the AdHoc Lite report?

0 upvote | 1 answer | 0 reply

Terryl Barnes answered -

There are many parameters for running the adhoc salary details report. For example, cost center, journal date/check date, employee ID, worktag #

[11:58 AM]

Donna Lorensen asked: Why can't we look at PeopleSoft reports for old FY?

0 upvote | 2 answers | 0 reply

Beverly Gibson answered -

Hi Donna! You can get to query and reports in PeopleSoft. If a new employee, log a service now request.

Lee Wates answered -

Donna you should be able to log into PS. You should have a tile for Legacy Financials in Techworks on your work page.