

Financial Summit 2025
Questions & Answers
11.7.2025

Accounts Payable Update	
Question	Answer
When an invoice is in 'draft' status, I do not see a contact person. Is that right?	The AP Associate is listed for all invoices in draft in Workday when you run the Find Problem Invoice Report in Workday. Please review the resource page for a step-by-step guide: https://procurement.gatech.edu/payables/training
Would you clarify the need for a PO for invoice transactions? There has been conflicting information shared regarding when a PO is/is not mandatory. It has come to my knowledge that if an invoice is \$2500 or less a PO is not required. Is this the case and would you please expound?	We have a policy reference for the types of invoices that do not require a Purchase Order here: https://policylibrary.gatech.edu/business-finance/supplier-invoice-request-sir
Travel & Expenses Update	
Question	Answer
Are travel authorizations now needed for in-state travel with the new rules related to the government shutdown?	Yes, and with the government shutdown all travel authorizations over \$500 will require additional justification and approval.
If a non-employee elected to stay at a B&B instead of the recommended or scheduled hotel, can the traveler receive reimbursement for lodging?	Per Georgia Tech's travel policy, reasonable lodging expenses are reimbursed at actual cost, provided they are incurred at a commercial lodging facility, such as a hotel or motel, that offers accommodations to the general public. Domestically, private residences or vacation rental marketplaces like Airbnb, VRBO, and HomeAway are not considered commercial lodging facilities and are therefore not reimbursable for domestic travel. However, a traditional bed-and-breakfast (B&B) that operates as a licensed commercial business, rather than a private home, may be eligible for reimbursement if proper documentation and receipts are provided. International travelers are exempt from this restriction unless there is an actual or perceived conflict of interest.
Please provide guidance on how to address meals included with a conference on an expense report.	When meals are included in the conference registration fee, travelers cannot claim per diem for those specific meals. On the expense report, travelers should exclude any meals provided (such as lunch or dinner) and only claim the meals not covered by the conference. It's also important to note this in the memo section of the relevant expense line, for example: "Lunch provided by conference."
For the IRB advances, could we take off the spend authorization questions related to travel?	Thank you for this feedback. The request will be reviewed internally to determine whether this adjustment is possible within Workday's current functionality.

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Is there a way to include the Worktag Manager in the Workday approval process? When I submit an expense report for a student, my supervisor is not a part of the approval process.	Yes, it's possible to include the Worktag Manager in the approval workflow. depending on the Worktag used. If you would like additional approvers to review student or non-employee expense reports, please submit a ServiceNow ticket to the Controller's Office. A justification should be included to demonstrate the compliance or oversight need for this review.
Could you please explain this message from Travel Inc? Travel Inc, said that there would have to be a name change to the credit for it to be applied to another person's flights. This comes with a \$100 fee. The agent said GT sometimes has points on file that can reduce or zero out that fee.	Travel Inc. is correct that airline name changes are treated as ticket exchanges and are subject to the individual airline's rules. Georgia Tech has points managed centrally with Travel Inc. that can offset or eliminate this fee, depending on airline policy and availability. Please submit a ServiceNow ticket with your specific scenario to better assist.
If airfare was paid for by sponsored funds and there is a credit, that credited amount should be returned to the sponsor and not simply used for another non-project related trip/person. 2 CFR 200.406 https://www.ecfr.gov/current/title-2/section-200.406	Yes, that is correct. When airfare is charged to a sponsored project and results in a credit or refund, that amount is to be returned to the original Worktag and/or sponsor. Please reach out to Grants and Contracts for further clarification of the sponsored project.
Does the travel restriction apply to the no-expense-to-GT trip (i.e., invited and all expenses paid by the host)?	When a traveler is invited to participate in an event and all expenses are paid by the host, the trip is considered "no-expense-to-GT." In these cases, the travel restriction generally does not apply. However, an approved Spend Authorization should still be submitted and marked as "No Expense to GT." This ensures appropriate documentation, liability coverage, and official approval for the traveler to be away on university business. A spend authorization should be submitted denoting a cost of 1 (one) cent to facilitate appropriate review of travel. https://policylibrary.gatech.edu/business-finance/authorization-travel
Is a spend authorization required for travel less than 50 miles in-state?	No, a Spend Authorization is not required for in-state travel under 50 miles. Individual departments may still require internal pre-approval depending on their internal procedures.
For Spend Authorizations that are not approved, is there a notification sent to the department as well as the traveler?	Currently, Workday does not have the functionality to send notifications to both the department and the traveler when a Spend Authorization is not approved (sent back/denied). Depending on who initiated the Spend

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	Authorization, the notification will be sent to either the traveler or the initiator (but not both).
Procurement Update	
Question	Answer
Can you explain more about bill only vs requisition?	Please see the Job Aid for Bill Only Requisitions - Financials Self-Service - What will bill only requisitions look like?
Business Assets Update	
Question	Answer
Is there somewhere we can access a list of the different spend categories that provides detail description of each? If not that would be very helpful.	Yes, this can be found on the Property Control website – https://s4.procurement.gatech.edu/equipment-spend-categories This presentation will also be available online for reference.
Regarding the "Find POs needing an Asset Spend Category by Organization-CR" report, we've moved the items that are potentially equipment to the appropriate asset spend categories. However, some items—specifically high-value materials and supplies—are still appearing on the report. Could you please advise how these non-equipment items can be excluded from the report? Is there a recommended approach to ensure they are properly classified and no longer flagged and appear on the report.	The report is based on Purchase Order data, so if a Change Order was not done on the PO, the report will not change.
Bursar Update	
Question	Answer
What is the link for Bursar virtual office hour on Fridays?	A request can be made by sending an email to deposit.ask@business.gatech.edu . Drop-in virtual appointments are Fridays 1-2pm through December 5 th . Information was added to the slide in the Financial Summit presentation.
Unified ERP Update	
Question	Answer
Is it likely the ERP may be delayed due to the budget issues in the USG?	There is no delay being discussed at this time.
Regarding Unified ERP: Where will SPD/Commitment Accounting fall? What about Budgeting?	We have added a Cross-Functional/End-User workstream within HR and Finance. GT and the USG are looking for people! Also, we'd expect these folks to reach back out to additional expertise within GT/the institutions.

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ERP: There really needs to be at least a few people from the units that are very knowledgeable and can advise on actual use	We have added a Cross-Functional/End-User workstream within HR and Finance. GT and the USG are looking for people! Also, we'd expect these folks to reach back out to additional expertise within GT/the institutions.
Financial Compliance Update	
Question	Answer
Can you see prior years in Workday on the Open Obligation Campus report?	Yes! Just make sure you don't include only budget reference filters in the report prompts, and they will be there!
What is the expected time turn around for requests to the allowable cost matrix in Service Now about purchases?	Goal is sooner rather than later - within a couple of days! If the ticket isn't routed directly through that Allowable Cost Tile, it will take a little longer. If ever there is a request you feel like isn't moving at a reasonable pace, please reach out to me amry.leroux@business.gatech.edu and I can follow up on it.
Finance and Planning Update	
Question	Answer
Has there been any discussions around anticipated furlough time during the shutdown?	Please refer to the Admin & Finance Federal Shutdown website - https://af.gatech.edu/federal-shutdown for the latest information.