

PI ARTICLE: GT Reports for Managing Sponsored Funds

This article highlights four reports you can use to help you manage your sponsored awards. Please review these reports **at least every month** to ensure that you maintain familiarity with our systems/reports AND that you stay on top of your spending. Your grant/financial administrator can assist you as needed.

Sponsored Billing Activity (Found in Webwise/CIS: <https://gtcrossroads.gatech.edu/main/reports>): this will provide award demographics, and details on charges, invoices, collections, expenses, and activity by month.

The screenshot shows the 'Sponsored Billing Activity' report interface. At the top, there are navigation tabs: 'GTCrossroads', 'My Tasks', 'Services', 'Apps', and 'Reports'. Below the tabs, the report title 'Sponsored Billing Activity' is displayed. The main area contains search filters: 'Award/Fund Number: ? (Format: A1234)', 'Old Project Number: ? (Format: A-1234)', and a 'Filter Type' dropdown with options for 'Award/Fund Number' (selected) and 'Old Project Number'.

SABER Suite (Found in Workday: <https://wd5.myworkday.com/gatech/d/home.html>): a suite of four SABER reports housed in Sponsored Reports in the Campus Reporting Dashboard in Workday and providing information on budget, actuals, obligations, commitments, and available balances. "SABER – Sponsored Award Budget Expense Report" is a great starting point.

The screenshot shows the 'Sponsored Reports' section in Workday. It lists several report options under 'General Sponsored Reports': 'SABER - Sponsored Award Budget Expense Report', 'SABER - Sponsored Award Budget Expense Report by Object Class', 'SABER - Sponsored Award Budget Expense Report - PEB', and a 'More (3)' link.

Grants & Contracts Ad Hoc Salary Expenditure Details & Encumbrances Details (Found in LITE: lite.gatech.edu): provides salary details on individuals paid off of your awards over specific periods of time.

The screenshot shows the 'Grants & Contracts Ad Hoc Salary Expenditure Details & Encumbrance Details' report in LITE. It includes filter instructions, download instructions, and a table of filters. The table has columns for Award, Grant, Sponsor, Cost Center, Employee Name & ID, Employee Department, and Job Title. Below the table, there are input fields for 'Expenditure & Encumbrance From Date (Defaults to start of Current FY)' (7/1/2023), 'Expenditure To Date (Defaults to End of the Month)' (2/29/2024), and 'Encumbrance To Check Date (Defaults to End of)' (6/30/2024).

PI Award Health Check (LITE and Workday Financials): a one-stop report providing award demographics and details on grant spending/budgets, open purchase orders, open sub-awards, and individuals paid.

The screenshot shows the 'PI Award Health Check' report in LITE. It features the Georgia Tech logo and a navigation menu. Below the logo, there are dropdown menus for 'Person' (Null) and 'Award/Grant Roles' (Lead PI). A 'Click To Show Awards' button is located at the bottom right.

If you have any questions, please contact Josh Rosenberg at josh.rosenberg@business.gatech.edu.