



Workday: Grants Management



Grants Management

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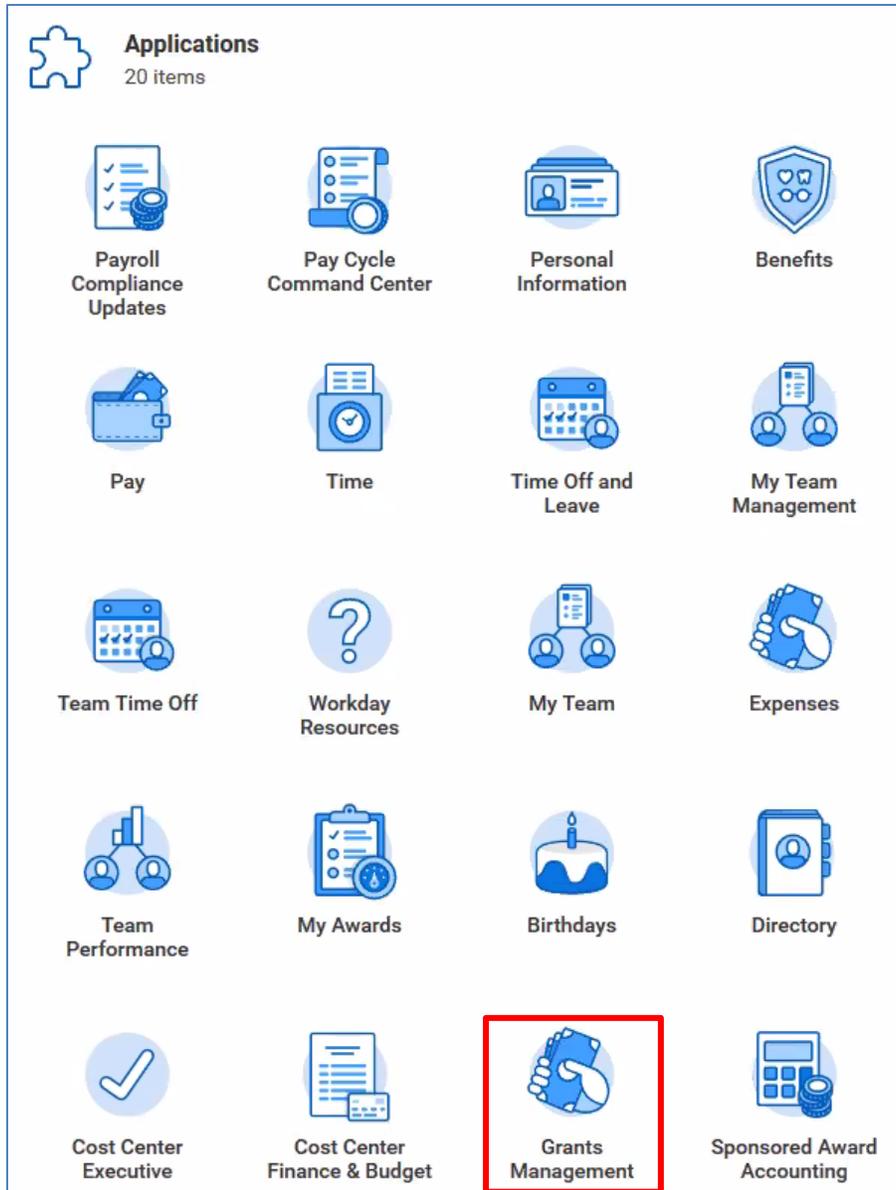
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Workday provides several Grants reports which are available through the **Grants** application on the Workday homepage. These reports are available to those with the role of Grant Financial Analyst and Principal Investigator/Grant Manager.

- Grant Financial Analyst – View only access
- Principle Investigator/Grant Manager – Initiator role to create requests, view data, and approval access

Access Grant Reports

On the homepage, under the Applications section, click the **Grants Management** icon.



Grants Management

The Grants Management dashboard contains the Budget Snapshot for all of the Active Awards associated with the person signed into the system. In addition, down the right side of the screen, a list of system shortcuts, based on functional area, is displayed.

Grants Management

Grants Management

Active Award Budget Snapshot

Award	Grant	Budget	Total Spend and Committed
AWD-00000001: RUI: SusChEM: Towards accurate computational dyn 09/01/2015 (version 0)	GR00164 RUI: SusChEM: Towards accurate computational dynamical and mechanistic studies of transition metal homegenous (photo)catalysis	195,425.03	186
AWD-00000002: MRI: Acquisition of an Inductively Coupled Plasma 09/01/2015 (version 0)	GR00188 MRI: Acquisition of an Inductively Coupled Plasma - Mass Spectrometry (ICP MS) for elemental concentration and specciation analysis at Montclair: State University	168,245.00	166
AWD-00000003: Changes in Shrub Abundance in Arctic Tundra From T 09/01/2015 (version 0)	GR00189 Changes in Shrub Abundance in Arctic Tundra From The Satellite High Resolution Record For The Arctic-Boreal Vulnerability	148,357.00	86
AWD-00000004: Collaborative Research: Integ 08/15/2015 (version 0)	GR00193 Collaborative Research: Integ	365,594.00	315
AWD-00000005: Partners for Health-Montclair Community Farms 10/15/2015	GR00009 Partners for Health-Montclair Community Farms	117,804.50	84

Budgetary Reports

- Grant Summary by Ledger Account
- Budget Summary by Grant

Award Management

- Tasks for My Awards

Transactional Reports

- Find Requisitions for Organization
- Find Purchase Order Line and Line Splits for Organiz...
- Find Supplier Invoices for Organization

Active Award Budget Snapshot

← Active Award Budget Snapshot Actions 🔍 🖨️

Company Montclair State University Period FY 2020 - 07 Jan

282 items 🔍 📄 🗑️ 🏠

Award	Grant	Budget	Total Spend and Committed	\$ Remaining
AWD-00000001: RUI: SusChEM: Towards accurate computational dyn 09/01/2015 (version 0)	GR00164 RUI: SusChEM: Towards accurate computational dynamical and mechanistic studies of transition metal homegenous (photo)catalysis	195,425.03	186,721.15	8,703.88
AWD-00000002: MRI: Acquisition of an Inductively Coupled Plasma 09/01/2015 (version 0)	GR00188 MRI: Acquisition of an Inductively Coupled Plasma - Mass Spectrometry (ICP MS) for elemental concentration and specciation analysis at Montclair State University	168,245.00	166,202.29	2,042.71
AWD-00000003: Changes in Shrub Abundance in Arctic Tundra From T 09/01/2015 (version 0)	GR00189 Changes in Shrub Abundance in Arctic Tundra From The Satellite High Resolution Record For The Arctic-Boreal Vulnerability	148,357.00	86,475.97	61,881.03
AWD-00000004: Collaborative Research: Integ 08/15/2015 (version 0)	GR00193 Collaborative Research: Integ	365,594.00	315,502.60	50,091.40

The following columns are included in the *Active Award Budget Snapshot* report:

- **Award** – Award name, award number, and the start date of the award.
- **Grant** – Grant number and name.
- **Budget** – Budget for the entire grant lifecycle.
- **Total Spend and Committed** – Actual revenues for the entire grant lifecycle.
- **\$ Remaining** – Remaining revised Budget, after subtracting Actuals, Obligations, Commitments and Reserved Journals for the entire grant lifecycle.

Export to Excel

To export the data from the Grants report into Excel, click the **Settings** icon in the upper right corner of the report, select **Edit Settings** and click **Download to Excel**.

Drill into Data

- 1) To view detailed information on a specific item or amount in a report, click on a blue item/amount to bring up additional details.

← Active Award Budget Snapshot Actions

Company Montclair State University Period FY 2020 - 07 Jan

282 items

Award	Grant	Budget	Total Spend and Committed	\$ Remaining
AWD-00000001: RUI: SusChEM: Towards accurate computational dyn 09/01/2015 (version 0)	GR00164 RUI: SusChEM: Towards accurate computational dynamical and mechanistic studies of transition metal homegenous (photo)catalysis	195,425.03	186,721.15	8,703.88
AWD-00000002: MRI: Acquisition of an Inductively Coupled Plasma 09/01/2015 (version 0)	GR00188 MRI: Acquisition of an Inductively Coupled Plasma - Mass Spectrometry (ICP MS) for elemental concentration and speciation analysis	168,245.00	166,202.29	2,042.71

The system opens the detail information for the item/amount selected.

- 2) Click the drop down arrow in the **View by** field to select the criteria to filter the data. An additional filter can be added by selecting another field in the **And then by** field.
- 3) Click **Refresh** to view the details of the filters applied.

← Active Award Budget Snapshot Actions

Criteria View by: Activity and then by: Select a Field... Refresh

2 items

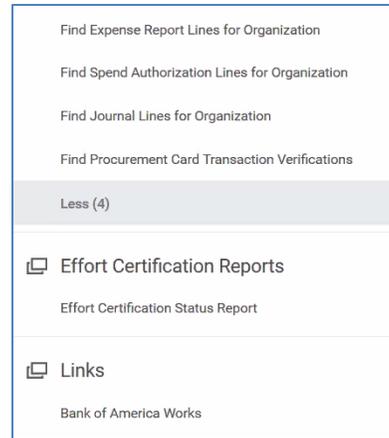
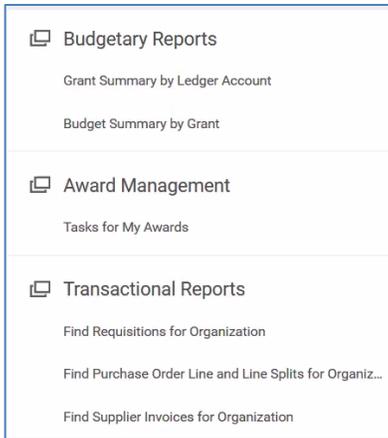
Activity	Budget	Actuals	Obligations	Commitments	Reserved Journals	Total Spend and Committed	\$ Remaining
(Blank)	195,425.03	186,721.15	0	0	0	186,721	8,704
Total	195,425.03	186,721.15	0	0	0	186,721	8,704

AWD-00000002: MRI: Acquisition of an Inductively Coupled Plasma 09/01/2015 (version 0)	GR00188 MRI: Acquisition of an Inductively Coupled Plasma - Mass Spectrometry (ICP MS) for elemental concentration and speciation analysis at Montclair State University	168,245.00	166,202.29
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System Shortcuts

On the right side of the Grants Management dashboard, there is a list of shortcuts for Budgetary Reports, Award Management, Transactional Reports, Effort Certification Reports, and Links.

To view the related data, click the corresponding shortcut to navigate to the report screen, enter your filter criteria, and view the related data.



Budgetary Reports

The **Grant Summary by Ledger Account** report contains all transactional activity for the selected grant's lifecycle by parent and child account.

- 1) Select criteria to filter this data by clicking on the **prompt** icon in the associated search field.
 - Enter the grant number or part of the grant name in the **Grant & Grant Hierarchies** field to return a list of available grants matching the criteria entered.
 - Enter an award number or part of an award name in the **Award** field to return a list of available awards matching the criteria entered.

Note – To view the Cost Share Budget and Actual Data related to the grant, select **F16** from the **Fund** option in the **Worktags** field.

2) Click the **OK** button in the bottom left corner to run the report.

The report displays the results for the *Grant Summary by Ledger Account* report.

Note – All data is from the start of the grant up through current day activity.

Ledger Account Summary	Original Approved	Amendments	Current Budget	Current Period	Year to Date	Life to Date	Obligation	Commitment	Reserved Journals	\$ Available to Spend	% Available to Spend	Cost Sharing
Direct Costs	\$1,023,632.00	\$0.00	\$1,023,632.00	0.00	\$1,135.12	\$317,661.64	\$18,292.40	\$250.00	\$0.00	\$687,427.96	67.16%	0.00
Salaries & Wages	\$139,650.00	0.00	\$139,650.00	0.00	\$825.12	\$82,598.57	\$13,963.60	0.00	0.00	\$43,087.83	30.85%	0.00
Graduate Assistants Pay	\$45,000.00	0.00	\$45,000.00	0.00	0.00	\$36,000.04	0.00	0.00	0.00	\$8,999.96	20.00%	0.00
Fringe Benefits	\$27,095.00	0.00	\$27,095.00	0.00	0.00	\$10,322.97	\$4,328.80	0.00	0.00	\$12,443.23	45.92%	0.00
Other Operating	\$98,448.00	(\$8,000.00)	\$90,448.00	0.00	0.00	\$1,912.93	0.00	\$100.00	0.00	\$88,435.07	97.77%	0.00
Contractual Services	0.00	0.00	0.00	0.00	0.00	\$34,235.21	0.00	0.00	0.00	(\$34,235.21)	0.00%	0.00
Stipend	0.00	0.00	0.00	0.00	0.00	\$4,620.00	0.00	0.00	0.00	(\$4,620.00)	0.00%	0.00
Travel Domestic	\$18,000.00	(\$2,000.00)	\$16,000.00	0.00	\$200.00	\$12,662.35	0.00	\$0.00	0.00	\$3,337.65	20.86%	0.00

The **Budget Summary by Grant** report shows the financial overview for the grants for which you have access.

- 1) Access information for a specific grant or award by entering the associated number or part of the name in the corresponding field of **Grant(s)** or **Award**.
- 2) Click the **OK** button to view the data.

The report displays the results for the *Budget Summary by Grant* report, with the start date of the grant listed in the award name column.

← Budget Summary by Grant Actions

Company Montclair State University Grant(s) Grant: GR00144 Montclair State University Noyce Teacher Scholarship Program

Period FY 2020 - 07 Jan

2 items

Award	Grant	Award Principal Investigator	End Date	Budget	Actuals	Obligations	Commitments	Reserved Journals	\$ Remaining	% Remaining	F16 Grants Cost Sharing
AWD-00000214: Montclair State University Noyce Teacher Scholarship 09/01/2013 (version 0)	GR00144 Montclair State University Noyce Teacher Scholarship Program	Sandra Adams	08/31/2020	1,447,272.00	1,105,104.61	0.00	0.00	0.00	342,167.39	□□□□ 23.6%	0.00
Total		Sandra Adams	08/31/2020	1,447,272.00	1,105,104.61	0.00	0.00	0.00	342,167.39	□□□□ 23.6%	0.00

Award Management

Tasks for My Awards displays a list of tasks that need to be completed for an Award. For example; end of Award reporting, technical reports due, invoice reviews, etc. Grants Accounting will assign tasks to the Principle Investigator/Grant Manager on an as-needed basis.

- 1) Click the prompt icon in the **Award Role** field and click **Award Organization Role** to select your role in the grant.
- 2) Click the **OK** button at the bottom left of the screen to display the assigned tasks.

Tasks for My Awards

Award Role * ☰

Award Groups ☰

Statuses ☰

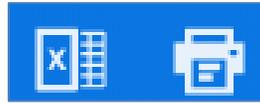
Award Closeout Tasks Only

Transactional Reports

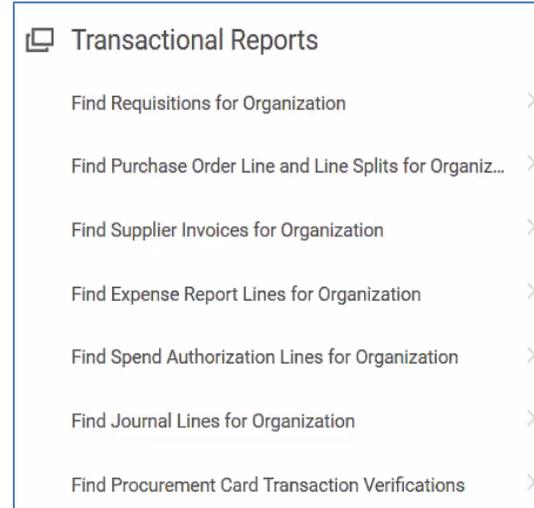
The **Transactional Reports** shortcuts contain links to view current financial transactions within the system associated to your grants.

Once a report displays, transactional details can be drilled into by clicking the twinkie to the right of the magnifying glass in the first column of any line.

Additionally, the report can be downloaded into an Excel spreadsheet, or printed, by clicking the corresponding icon located on the right side of the banner.



- Find Requisitions for Organization
- Find Purchase Order Line and Line Splits for Organization
- Find Supplier Invoices for Organization
- Find Expense Report Lines for Organization
- Find Spend Authorization Lines for Organization
- Find Journal Lines for Organization
- Find Procurement Card Transaction Verifications



Effort Certification Reports

The **Effort Certification Status Report** shows the overall estimated percentage allocations, by semester, for time and effort spent on sponsored projects and non-sponsored time. The effort certification process is a method for confirming that charges made to sponsored awards are reasonable in relation to the work performed, and is processed every semester. The certification request is sent out to the PI/Grant Manager's Inbox as well as an email.

Note- This status report is for review only – no certifications on time and effort can be made from this report. PIs/Grant Managers will still receive a notification in Workday when certifications are due.

- 1) In the **Organization** field, click the prompt icon and select **All Active Grants** to get information on those grants for which you are associated.
- 2) Click the **OK** button at the bottom of the screen to run the report.

Effort Certification Status Report

Organization *

Effort Certification Date From *

Effort Certification Date To *

Effort Certification Type

Has Attachments

Effort Certification Status

Employee

Effort Certification has Costed Changes

Past Due

Past Due More Than (Days)

OK
Cancel

The results display the certification status for the selected grants for the specified time period.

← Effort Certification Status Report Actions											
Effort Certification	Employee	Type	Start Date	End Date	Status	Awaiting Persons	Due Date	Days Past Due	Has Costed Changes	Is Effort Certification Change Multi-Company	Has Attachments
MSU Effort Report for Adam Dibella for 01/19/2019 - 06/21/2019	Adam Dibella	MSU Effort Report	01/19/2019	06/21/2019	Certified		08/05/2019		No	No	No
MSU Effort Report for Adam Dibella for 06/22/2019 - 08/16/2019	Adam Dibella	MSU Effort Report	06/22/2019	08/16/2019	Certified		10/28/2019		No	No	No
MSU Effort Report for Aditya Dutta for 01/19/2019 - 06/21/2019	Aditya Dutta	MSU Effort Report	01/19/2019	06/21/2019	Certified		08/05/2019		No	No	No
MSU Effort Report for Aditya Dutta for 06/22/2019 - 08/16/2019	Aditya Dutta	MSU Effort Report	06/22/2019	08/16/2019	Certified		10/28/2019		No	No	No

Links

The link to the **Bank of America Works** site allows the card holder to view the current open balance available on their card, as well as provides a venue to dispute charges.