

IOWA STATE UNIVERSITY

**Effort Certification and Grants Reporting in Workday**  
Nov 15, 2018

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**Effort Certification Overview**

- Population:
  - Federal/Federal Flow-Thru
  - Federal/Federal Flow-Thru Cost Share
- Two future state effort certification business processes:
  - Effort certification for salaried employees
  - Effort certification for hourly employees
- SPA will kick off effort certification run in alignment with applicable certification periods

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**Effort Certification: Current vs. Future**

<b>Current</b>	<ul style="list-style-type: none"><li>• Use of KFS and paper EASE forms</li><li>• EASE forms are printed, distributed, signed, and returned</li><li>• Corrections are written on EASE forms, returned to SPA to be reprocessed</li><li>• All employees are required to certify at least once annually, regardless of funding sources</li></ul>
<b>Future</b>	<ul style="list-style-type: none"><li>• Initiated through the Effort Certification business process in Workday</li><li>• Approvals routed directly in the system, eliminating any paper forms</li><li>• A smaller subset of the population will be required to certify effort</li><li>• System tracking of effort reports will automate processes for monitoring and follow up</li></ul>

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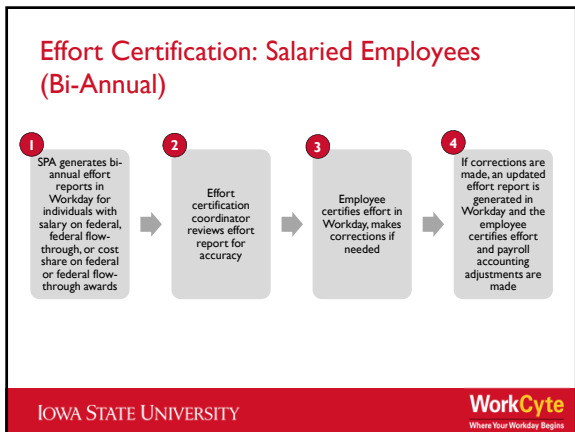
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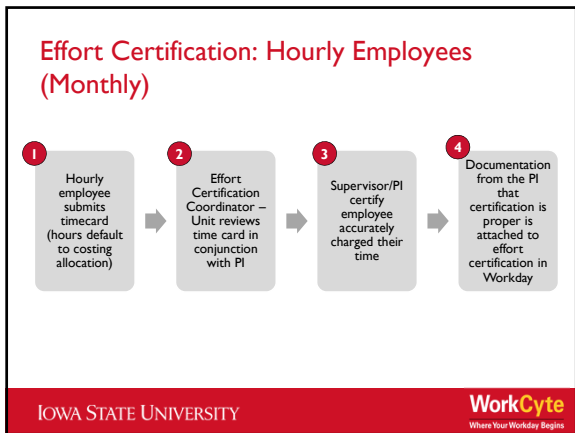
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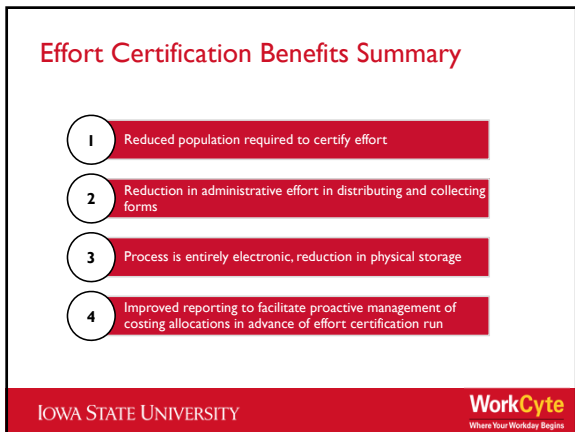
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### Changing Effort for Salaried Worker

Name	Department	Position	Pay Group	Pay Grade	Effort	Amount
Earling Academic Pay - Earned	Business Unit 0021 Engineering	Assistant Professor	020	25	100%	1,326.40
Earling Academic Pay - Earned	Business Unit 0021 Engineering	Assistant Professor	020	25	100%	938.50
Earling Academic Pay - Earned	Business Unit 0021 Engineering	Assistant Professor	020	25	100%	938.50
<b>Total</b>						<b>4,177.00</b>

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### Effort Certification Change Questionnaire

Question: Why were these expenses originally charged to the Grant or Cost Share from which they are now being transferred?  
Answer: Administrative error

Question: Why should these charges be transferred to the proposed receiving Grant or Cost Share or other funding source?  
Answer: Moved Effort to Cost Share

Question: Why is the transfer being requested more than 90 days after the month of the original transaction? Also, describe action being taken to alleviate future need for transfers of this type?  
Answer: Did not get notice from PI.

Question: Are you complete with all changes for this reporting period?  
Yes:  No:

Submit Change Effort Save for Later Cancel

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### Worker Reviews Effort

Employee	Department	Position	Pay Group	Pay Grade	Effort	Amount
Earling Academic Pay - Earned	Business Unit 0021 Engineering	Assistant Professor	020	25	100%	1,326.40
Earling Academic Pay - Earned	Business Unit 0021 Engineering	Assistant Professor	020	25	100%	938.50
Earling Academic Pay - Earned	Business Unit 0021 Engineering	Assistant Professor	020	25	100%	938.50
<b>Total</b>						<b>4,177.00</b>

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### Retroactive Payroll Accounting Adjustment from Effort Certification Change

ID#	Account	Position	Pay Component	Worktype	Budget Date	Hours
122140	Lecturer - Professor	Professor - Federal Salary 9/18	Academic Pay - Earned	Business-001-BUS1-Engineering Cost Center-023271-UNIVERSITY Chemical and Biological Sciences Function-Sponsored/Research Fund-F002-Central Government BS Resource Type-071201-GRANT Issue Management/Research F002	09/30/2018	
026130	Lecturer - Professor	Professor - Federal Salary 9/18	Academic Pay - Earned	Business-001-BUS1-Engineering Cost Center-023271-UNIVERSITY Chemical and Biological Sciences Function-Sponsored/Research F002	09/30/2018	

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### Retroactive Effort Adjustment after Effort Certification has been completed

- If Effort needs to be changed after Effort Certification process has completed:
  1. Effort Certification Coordinator contacts SPA Manager
  2. SPA Manager reruns Effort Certification for specific person
  3. Effort Certification Coordinator changes effort
  4. Worker re-approves
  5. Retroactive Payroll Accounting Adjustment is processed
- Normally involves moving payroll off a Grant

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## GRANTS MANAGEMENT REPORTING

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### Grants Management Reporting Overview

- Approach:
  - Evaluating the needs of the various stakeholders
- Grants Dashboards:
  - Pls, Grant Coordinators, SPA Accountants
  - Provides short cut to personalized information
- Other reports in process to support Effort Certification and Grants
- Reports: Portfolio of Awards, Awards Expiring in 90 days, SPA Financial Reports

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### Grants Management Reporting: Current vs. Future

- |                |   |  |
|----------------|---|--|
| <b>Current</b> | } | <ul style="list-style-type: none"><li>• eData provided reports</li><li>• Information updated after nightly posting run</li><li>• Separate system to learn</li><li>• Not customizable without help from report writers</li></ul>  |
| <b>Future</b>  | } | <ul style="list-style-type: none"><li>• Workday provided reports</li><li>• Uses Workday security model for report viewers</li><li>• Real-time</li><li>• Able to drill into transactional details</li><li>• Can combine charts, graphs, tables, and key performance indicators (KPIs)</li><li>• Can join reports with transactions for better decision-making</li></ul> |

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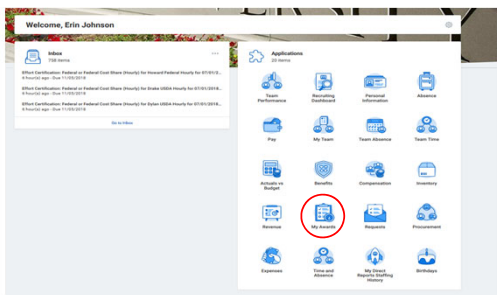
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### Dashboard



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## Dashboard

WDR 219 Portfolio of Awards

Asset	Asset Name	Asset Type	Asset Category	Asset Sub-Category	Asset Status	Asset Value	Asset Date	Asset Location	Asset Description	Asset Notes	Asset Actions
4402100000	2017-18 Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	4,000,000	12/31/17	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses

WDR 219 Awards Expiring in 90 Days

Asset	Asset Name	Asset Type	Asset Category	Asset Sub-Category	Asset Status	Asset Value	Asset Date	Asset Location	Asset Description	Asset Notes	Asset Actions
4402100000	2017-18 Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	4,000,000	12/31/17	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses

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## Portfolio of Awards

Days: 14/01/2019 Ref: P133

Asset	Asset Name	Asset Type	Asset Category	Asset Sub-Category	Asset Status	Asset Value	Asset Date	Asset Location	Asset Description	Asset Notes	Asset Actions
4402100000	2017-18 Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	4,000,000	12/31/17	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses

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## Awards Expiring in 90 Days

Days: 14/01/2019 Ref: P133

Asset	Asset Name	Asset Type	Asset Category	Asset Sub-Category	Asset Status	Asset Value	Asset Date	Asset Location	Asset Description	Asset Notes	Asset Actions
4402100000	2017-18 Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses	4,000,000	12/31/17	Operating Expenses	Operating Expenses	Operating Expenses	Operating Expenses

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### SPA Financial Report

WDR-42 SPA Financial Report - Company Prompts

From: 11/14/2018 To: 11/14/2018

Unit: 2018-19 SPA Financial Report - Company Prompts

Line	Account	Label	YTD Budget	YTD Actual	YTD Variance	YTD %	YTD %	YTD %	YTD %	YTD %	YTD %	YTD %	YTD %
1	2018-19 SPA Financial Report - Company Prompts		100.00	100.00	0.00	100%	100%	100%	100%	100%	100%	100%	100%
2	2018-19 SPA Financial Report - Company Prompts		100.00	100.00	0.00	100%	100%	100%	100%	100%	100%	100%	100%
3	2018-19 SPA Financial Report - Company Prompts		100.00	100.00	0.00	100%	100%	100%	100%	100%	100%	100%	100%
4	2018-19 SPA Financial Report - Company Prompts		100.00	100.00	0.00	100%	100%	100%	100%	100%	100%	100%	100%

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### Grants Terminology Cydewalk (Partial)

Right now we call it...	In Workday we call it...
Account Number	Grant/Gift/Program/Project
Class Codes/Object Code	Spend categories/revenue categories/ledger accounts
Electronic Personnel Action	Costing allocation
Labor Cost Transfer	Payroll accounting adjustment
Sponsored Programs Account	Grant
Sponsored Programs Account Number	Grant Worktag
Award Status	Award Lifecycle Status/ Award Line Lifecycle Status
Cost Transfer	Accounting Adjustment
Organization Code	Cost Center

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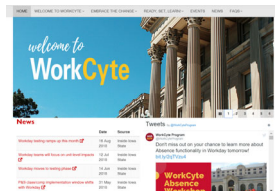
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### Want More WorkCyte Program Information?

- WorkCyte Website:
  - Full Grants Cydewalk will be posted in the coming weeks!
  - Up-to-date information on the project
  - Training updates
  - And so much more!



<https://www.workcyte.iastate.edu/>

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### Submit Your Questions!

- Targeted 48-hour answer turnaround time for questions asked through the WorkCyte website [here](#)
- Ongoing tracking of questions by Change Management team

#### Ask a Question

**First and Last name \***

Please fill your first and last name

**Email Address \***

Your Iowa State email address

**Verify Your Email Address \***

**Department \***

Select

**Question Area \***

- General
- HCM
- Financials
- Student Information Systems
- Oka

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## Questions?

[Workcyte\\_change@iastate.edu](mailto:Workcyte_change@iastate.edu)





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WorkCyte Change Management Team

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[workcyte\\_change@iastate.edu](#)



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