

Welcome and Housekeeping

- Please use the Q&A box to ask questions.



- We will attempt to answer your questions throughout the presentation.
- You will receive the slides from today's presentation.
- You can find this presentation and more on **transformation.gatech.edu**



**Georgia
Tech**®

Workday 2021R2 Release

9/8/2021

Team Introductions

Nate Watkins

Academic & Research Units
Lead, Expenses Interim

Paul Brown

Budgets & Supplier Accounts
Lead *until Friday*

Daniel Stewart

Customer Accounts & Projects
Lead, Procurement Interim

Don Cochran

Grants Lead

Andre Goodman

Business Intelligence Lead

Veronica Stokes

Financial Accounting & FDM
Lead

Greg Phillips

Transformation Portfolio
Director

Agenda

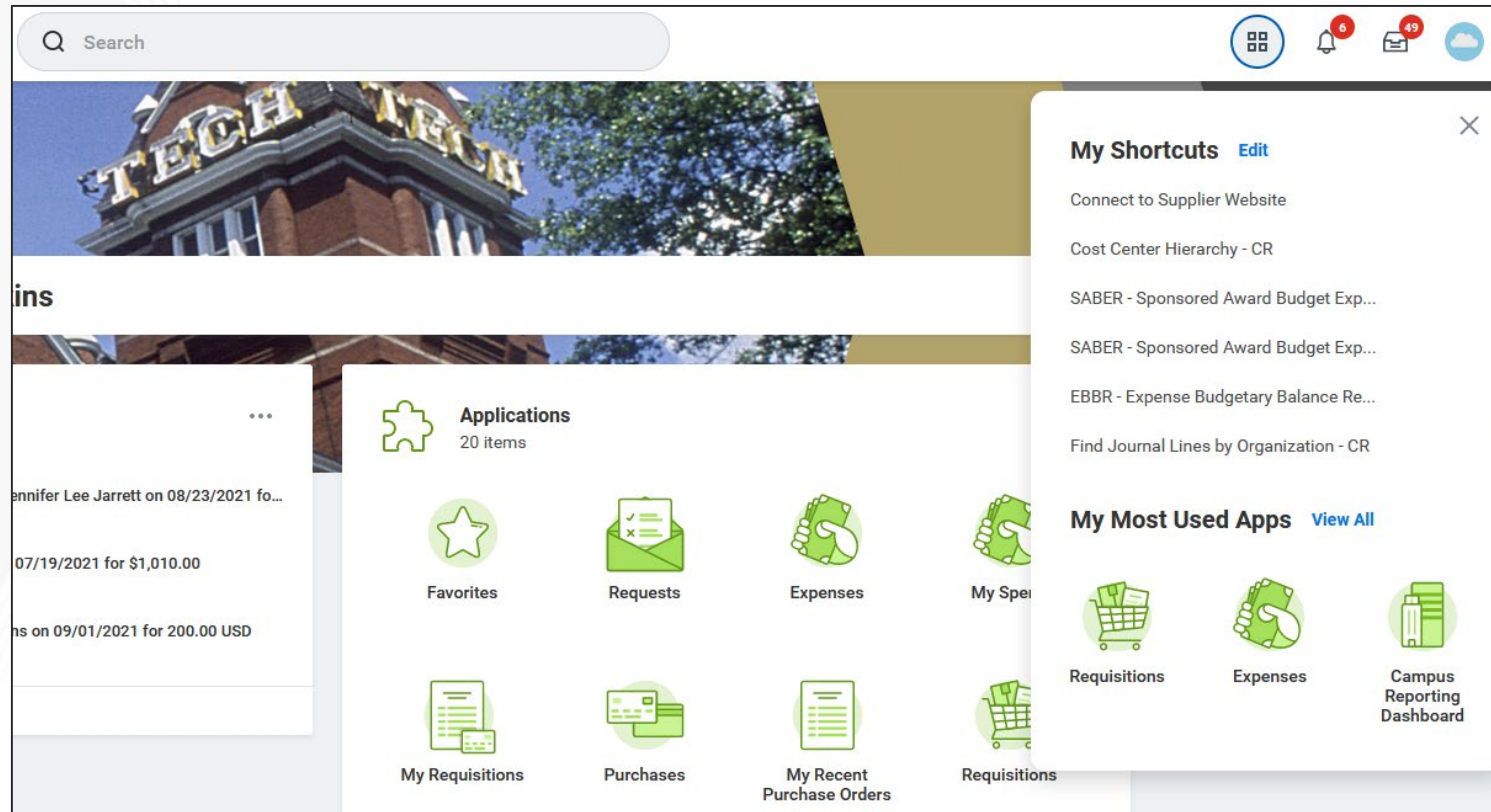
- General Release Information
- Functionality Overview
 - User Experience
 - Expenses
 - Reporting
 - Supplier Accounts
 - Procurement
- Release Demo
- LITE SABER Demo

Workday 2021R2 Release

- Workday Community Release Center
 - <https://community.workday.com/dashboards/release-prep-center>
 - Informational videos
 - Release notes
- What's New in Workday Report released 7/31
- Features in Preview 8/7
- Production Release 9/11
- Two types of release items
 - Automatically Available – Can't opt out, may still require some configuration
 - Setup Required – Optional functionality, requires additional configuration

2021R2 User Experience

- Interface changes
- Instead of reports navigating to a prompts page, there is a popup
- Changes to the search features



2021R2 Expenses

- Budget date on spend authorizations
 - Required field
 - Defaults to travel start date
 - No major effects
- Expense Report Work Area for October

Start Date * 10/01/2021

End Date * 10/15/2021

Description * Conference

Business Purpose X Conference/Seminar ...

Currency USD

Spend Authorization Lines Attachments

+ Add

Spend Authorization Line	
Lodging - Domestic Travel - Non-Employee	500.00

Expense Item * X Lodging - Domestic Travel - Non-Employee ...

Quantity * 5

Per Unit Amount * 100.00

Total Amount * 500.00

Budget Date * 10/01/2021

Memo Hotel stay 10/1-10/15

Cash Advance Requested

2021R2 Reporting

- Drill-to on composite reports
 - Allows us to embed links to other reports
 - Example: Create a field within EBBR to quickly run Find Expense Reports by Org
- Journal lines reporting
 - New fields available for any report using journal lines (FJL, EBBR, Gen Ops, etc)
 - Example: Add expense item details on drill-down
- Reminder: Campus Reporting Dashboard

**All of these are new tools
in our reporting toolbelt**

Income Statement with Drill-to Budget

You need to change the filter criteria if you want to run this report for regions other than United States.

Company: 4CON Consolidation - North America

Period: 2013 - Mar

21 items

Ledger Account	Actual	Budget	Variance	Actual Total	Budget Total
Revenue	17,680,422.88			422.88	1,990,000.00
Cost of Sales	4,866,215.00			215.00	636,800.00
Gross Profit	12,814,207.88			207.88	1,353,200.00
Operating Expenses	311,368.11			368.11	870,064.00
Corporate: Contingent Labor	26,840.00			840.00	29,100.00

View By
Company
Cost Center
Ledger Account
Region
View Details
Export to Excel (All Columns)
Export to PDF

Drill-To Report Links
Drill To Budget

2021R2 Supplier Accounts

- Supplier Invoice Split-Screen
 - Attachment displayed in sidebar
- Supplier Invoice Details
 - All payment history displayed in Activity tab
 - New Comments Field

View Supplier Invoice

Supplier Invoice Invoice Number INV-1287266

Status Approved Payment Status Unpaid

Budget Check Status Not Required

Invoice Information

Company CO503 Georgia Institute of Technology

Supplier Big Cheese

Remit-To Connection Big Cheese - Remit-To: Big_Cheese_1110_Forest_Dr

Currency USD

Invoice Date 09/01/2021

Attachments Supplier Invoice_INV-12386...

Supplier Invoice_INV-123... 1 of 1

eInvoice

Georgia Tech

Bill To: Georgia Tech
Accounts Payable
711 Marietta Street,
Atlanta, GA 30318

Supplier Information		Remit to Information	Invoice Detail
Supplier Name:	VTR STOCK ROOM - VENDOR USE ONLY	Supplier Name:	VTR STOCK ROOM - VENDOR USE ONLY
PO BOX:	640169	PO BOX:	640169
Pinpoint:	PA 15264	Pinpoint:	PA 15264
	United States of America		United States of America
Email Address:	Education@vtr.com		
Payment Term:	Net 30		
Phone Number:	+1 (610) 3861700		
Fax Number:	+1 (484) 8817096		
Invoice Number(WD):	INV-1238643		

Purchase Order Details			
Purchase Order	Purchase Order Date	Ordered By	Email
PO-5146039	2021-03-31	Kendall J Graham	kendall.graham@business.gatech.edu

Invoice Lines Attachments **Activity** Process History

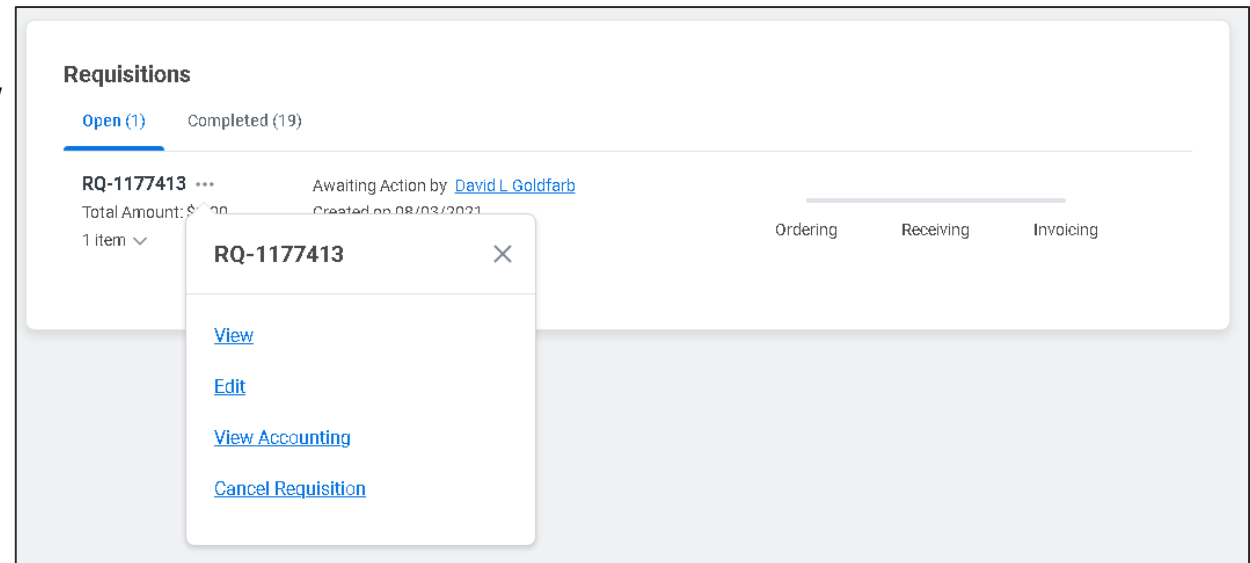
Payments 2 items

Turn on the new tables view

Supplier Payment	Payment Date	Status	Reconciliation Status	Company	Transaction Reference	Payment Amount	Discount Taken
<input type="text"/>	03/30/2021	Canceled	Unreconciled	CO503 Georgia Institute of Technology	963154	3,825.00	0.00
<input type="text"/>	05/13/2021	Complete	Reconciled	CO503 Georgia Institute of Technology	967024	3,825.00	0.00

2021R2 Procurement

- Requisitions Worklet – Coming November 2021
 - Easier way to create requisitions (current method will still be available)
 - Check status of requisitions that were:
 - Recently open
 - Completed
 - Review the downstream transactions
 - Benefits to campus
 - Streamlines requisition workflow
 - Reduces workload
 - Provide transparency into procure-to-pay process



Need Help or Want More?

- [Request an ERP Consultation](#)
- [View other recorded webinars here](#)

The screenshot shows the Georgia Tech Services & Support portal. The header includes the Georgia Tech logo and the tagline "CREATING THE NEXT". The main navigation bar contains "AGENT PORTAL", "HOME", "KNOWLEDGE", "MY REQUESTS", "MY APPROVALS", and "SYSTEM STATUS". The breadcrumb trail is "HOME > FINANCIAL SERVICES > GENERAL WORKDAY > ERP PROGRAM CONSULTATION REQUEST". The page title is "ERP Program Consultation Request" with the subtitle "Request a OneUSG Connect or Workday Consultation". The main content area contains a "SUBMIT REQUEST" button, a "Required information" section with red boxes for "Department Name requesting the", "About how many attendees will at", "What topics or challenges do you", and "Do you have space to host the con", and a form with fields for "*Requested By", "*Requested For", and "*Preferred Contact Method" (set to "Email"). A checkbox option is also present: "The 'Requested for' user was not listed in the search".

View All Resources

FINANCIAL DOCUMENTS

- [Workday Training Material Links for Temps & Affiliates](#)
TechTemps & Affiliates may have issues accessing training materials due to system limitations. Please use these direct links if needed.
[Delete](#) | [Edit](#)
- [Quick Reference Guide- Workday Financials Register or Cancel Training](#)
Follow this guide to learn how to register for or cancel a Workday Training session.
[Delete](#) | [Edit](#)
- [Financials Change Agent List](#)
List of all the Financials Transformation Change Agents and their associated units.
[Delete](#) | [Edit](#)

PRESENTATIONS & TUTORIALS

- [Financial Accounting Lunch & Learn Slides](#)
Download the presentation from the Financial Accounting Lunch & Learn on 10/22/20.
[Delete](#) | [Edit](#)
- [Workday Projects Lunch & Learn Slides](#)
Download the presentation from the Workday Projects Lunch and Learn.
[Delete](#) | [Edit](#)
- [Workday 2020 R2 Release Webinar Slides](#)
Download the presentation from the R2 2020 webinar.
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DEMOS & INFO SESSIONS

- [Financial Accounting Lunch & Learn Recording](#)
Watch the recording from the Financial Accounting Lunch and Learn on 10/22/20.
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- [Workday Projects Lunch & Learn](#)
Watch the recording from the Workday Projects Lunch & Learn.
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- [Workday 2020R2 Release Preview](#)
Watch the recording from the Workday 2020R2 preview webinar.
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[View All Archive Links](#)

2021R2 Demo

- Interface changes
- Prompts popup
- Changes to the search features
- Expense Report Work Area
- Requisition Worklet

LITE SABER Preview

- Sources from EDW, similar to SABER in design
- Includes additional features
 - Direct Excel/file transportability
 - Multiple views in object
 - Ability to include OneConnect personal services details
 - Award Summary (exploring adding object class and grant hierarchy)
 - Grant Summary
 - Grant Summary by object class
 - Grant Details for each grant
 - Ability to run report for an entire cost center
 - Ability to search by Sponsor, PI, Grant Manager



Updates to Training and Knowledge

- Each release the job aids and web-based trainings are assessed for updates
- This release includes mostly screenshot updates as little is changing to our processes
- Updates will be made during the week of 9/13
- Training is now hosted on the new Genius/Canvas platform on campus, accessible via training.hr.gatech.edu



Questions