

Research Workday Report

Townhall

August 10th, 2023

Agenda

- Voice of Customer Sessions
 - Feedback
 - Solutions in Progress
- Report Prompts
- Report Dashboard
- New Labor Reports
- Other Research Reports
- Training Updates
- Q&A

Voice of Customer Sessions

Voice of Customer Sessions

- Voice of Customer sessions
- One of the major themes was reporting
- New Reports, Training Workshops, and Townhalls

Key Challenges and Voice of Customer (VoC) Feedback

Commitment accounting for payroll obligations was impacted by a change to improve another function resulting in obligations calculating for the entire notice of grant award period for NIH awards versus through the current active budget period to synchronize with current funding levels and budget.

Grant Manager and Cost Center Manager roles cannot see payroll cost information for effort funded for their PIs by other Departments when cross departmental collaboration occurs.

Effort and Detail Transaction reports need modification to improve function and user experience. Person led training is needed to assist users with utilizing existing reports.

Subcontracts are not generating obligation accounting to show outstanding commitments against grant funding.

Key Challenges and Voice of Customer (VoC) Feedback

The Payroll Accounting Adjustment process in Workday is more complex than our legacy application and has fewer validations to minimize errors in processing.

Close outs are a challenge and Departments do not believe they have the tools to complete the close out procedures.

Select instances of grant conversion data not matching project to date balances or GL legacy monthly balances.

Solutions in Progress

Root cause of change in payroll obligation calculation problem has been identified. Team is testing restoring grant award dates to reflect the award's current budget year end date to support accurate payroll obligations.

Identified reports remediated. Identified approach and team to provide education on key reports to be used for grants management and close-outs. A Research Town Hall meeting is scheduled for Thursday to demo key research reports, to review purpose/use for each report, and to educate users on how to utilize report prompts. Supplementing with consultant resources for additional report development as needed.

Identified configuration issue to support subcontract obligation build. Working with the Supply Chain team to update configuration and remediate current active subcontracts.



Solutions in Progress

Training team is working on instructor led training classes for Payroll Costing Allocation (PCAs) and Payroll Accounting Adjustment (PAAs) to supplement current quick reference guides. Deep-dive on reasons for PAAs to determine if volumes can be decreased by supplementing or remediating adjacent processes. VUMC is working directly with Workday on changes/enhancements to these processes to provide a more streamlined user experience and better system validations.

Post award team is conducting departmental close out sessions to validate outstanding gaps to efficiently perform close out processes. This overlaps with other VoC solutions in process.

Analyzed examples of grant conversion errors and identified root cause. Identifying populations impacted by root cause. Complete functional verification and process updates.



New Report Requests

What area are you having a problem with?: Report Issues – Departmental Finance

i Reminder: You may need to log into the VPN to run and view reports depending on your location. Please be sure to include the Report Name in the Description to report your issue. If you are requesting a new or modification to the report, please use the [Workday Report Request](#) form.

* Description: Summary of the problem, services affected, impact to the business, etc.

* Impact: 2 - Department

* Urgency: Work Is Impaired

* Can the technician resolve this issue without making contact with you?: No

Tell us a little about who needs assistance.

Who is the customer?

I AM THE CUSTOMER I AM NOT THE CUSTOMER

Preferred contact method:

EMAIL PHONE

Device Id:

n/a

- Open new Incident Ticket

<https://pegasus.vumc.org/ess/workday>

- Reporting Issues – Departmental Finance
- Requests for new reports may take 4-6 weeks. Please be patient if you can or communicate if a report needs to be pushed up the priority list.

Report Prompts

Report Prompts

CR Fin - Labor Detail by Fiscal Period

Company * x Vanderbilt University Medical Center

Organization x Grant Hierarchy: GH CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts

Period * x FY23 - Jun

Worktags x Employee: Walter Melon (0000003)

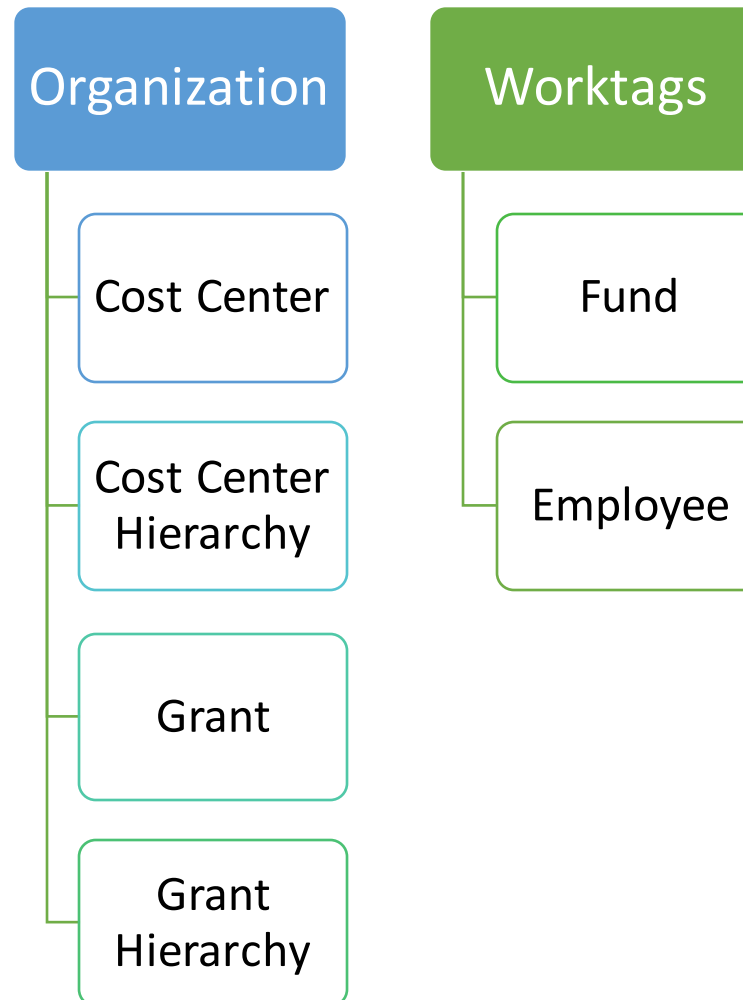
Pay Group

Filter Name

Manage Filters Save

0 Saved Filters

OK Cancel



Note: Grant vs. Gift

Funds in Workday

Fund Type	Description	Notes
Fund 1 = FD001	General Fund	<ul style="list-style-type: none">• Unrestricted operating funds. Would include legacy 104, 304, 305, 307 centers• With the presence of a grant worktag (GR), this indicates a Salary Over the Cap charge (the Salary Over the Cap type worktag will also be present)
Fund 2 = FD002	Temporarily Restricted Gifts	
Fund 3 = FD003	Permanently Restricted Gifts	
Fund 4 = FD004	Sponsored Program Fund	<ul style="list-style-type: none">• Contains Grants and Contracts billable expenses• Using FD004 as a worktag will exclude Salary Over the Cap expenses that are found in FD001
Fund 5 = FD005	Cost Share Fund	Mandatory Cost Share

Report Dashboard

Department Finance Reports (Dashboard)

Department Finance Reports

Clinical Enterprise
Academic Enterprise

CR Academic Enterprise Reports ⚙️

Report Task	Brief Description
CR Fin - Academic Enterprise Clinical Practice Details	P&L format for Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns the budgeted margin for that department (i.e. no grant or gift activity).
CR Fin - Academic Enterprise Cores	Filtered results based on CARTS values to return CORES data. P&L format for Clinical areas of the Academic Enterprise. Organization prompt can be run by cost center, or cost center hierarchy level. If run at the department level, returns only CORES activity.

CR Labor Reports ⚙️

Report Task	Brief Description
	selected during the runtime
CR - Labor Distribution by Earnings_Detailed	Provides detailed information about each employee's earnings by categories such as Regular, PTO, Sick, Orientation, Other, Overtime, Shift and Premium
CR - Labor Distribution by Hours	Provides summary of hours by each cost center, divided into categories such as Regular, PTO, Sick, Orientation, Other, Overtime, Shift and Premium. It also drills down to Ledger Account, Job Category and employee level

CR Research Reports ⚙️

Report Task	Brief Description
CR Effort Actuals and Obligations	
CR Fin - Budget vs Actual for Grant or Award	
CR Fin - Department Salary Trend for Grant or Award	Combines actual and obligation journals from payroll to trend salary and fringe by person for the prompted grant or award. Payroll obligations build for the current fiscal year, or for research only through the award line end date.

CR VMG Reports ⚙️

Report Task	Brief Description
CR FIN - Allocation Transactions	This report offers Journal Level detail for transactions with the Professional Service Revenue (4020) and Allocations (6495) Ledger Accounts.
CR FIN - Cost Center Professional Revenue Trend	This report shows FYTD trends for transactions posted with the Professional Service Revenue (4020) and Allocations (6495) Ledger Accounts.
CR FIN - Professional Revenue Trend - Cost Center Level	This report will deliver the FYTD trend for Professional Service Revenue (4020) Ledger Account by Cost Center.
CR Fin - Provider Collections by Bill Area Trend	This report delivers FYTD Trending for Provider and Bill Area level collection amounts for the Professional Services Ledger Account (Account #4000)

CR Gifts Reports ⚙️

Report Task	Brief Description
CR Fin Endowment Gifts	
CR Fin Spendable Gifts	

[View More ...](#)

CR FDM Reports ⚙️

Report Task	Brief Description
CR FIN Cost Center Lookup	Provides a list of valid cost centers as well as rollup levels for the cost center hierarchy

[View More ...](#)

Labor Reports

CR Fin – Labor Detail by Fiscal Period

- Who: Cost Center Manager, Cost Center Financial Analyst with Payroll Details, Grant Manager, Grant Financial Analyst
- What: Report shows data for hours and dollars paid for each worker.
- Why: This report is used in salary expense review
- When: At least monthly or as often as needed to manage labor expenses.
- Notes: Report can only be run for 1 period at a time and only includes salary expenses no fringe.

CR Fin – Labor Detail by Fiscal Period

CR Fin - Labor Detail by Fiscal Period

Company *

Organization

Period *

Worktags

Pay Group

Manage Filters

0 Saved Filters



CR Fin - Labor Detail by Fiscal Period



Company Vanderbilt University Medical Center

Period FY23 - Jun

Organization Grant Hierarchy: GH CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts

989 items

Journal	Journal Source	Cost Center Code	Cost Center	Ledger Account	Spend Category	Grant	Gift	Program	Project	Fund	Sal- O- G- Typ
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR003810 4043556155 1903-03793:GCA:COMBINATORIAL SINGLE CELL STRATEGIES-CLINICAL				FD004 Sponsored Program Fund	
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts ...	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR006875 4043900121 RDK128200-01 SPERMIDINE AS A NEW THERAPY FOR COLITIS AND CHE				FD004 Sponsored Program Fund	
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR011911 4043550253 RDK124385-02:ROLE OF AFRICAN-CENTRIC TP53 VARIANT IN HIGHE				FD004 Sponsored Program Fund	
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR013790 4043910401 PCA116087-16:H. PYLORI-INDUCED INFLAMMATION AND GASTR-CORE A				FD004 Sponsored Program Fund	
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR009954 4043553793 W81X WH-21-1-0617:TRANSLATIONA L IMPACT OF ELECTROPHILE ADDUCT				FD004 Sponsored Program Fund	
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC154 SWB: Regular	GR004528 4043557015 CORRONA INFLAMMATORY BOWEL DISEASE (IBD) REGISTRY				FD004 Sponsored Program Fund	
...	Payroll Forward Accrual	CC02862	CC02862 Medicine -	5010:Staff Salaries: Non-	SC154 SWB: Regular	GR004528 4043557015				FD004 Sponsored Program	

Salary Over the Cap Type	Employee Name	Supervisory Org ID	Supervisory Org	Job Profile	Pay Component	Pay End Date	Pay Cycle Type	Pay Group	Check Date	Earns Begin Date	Earns End Date	VUMC Paid Hours	VUMC Paid Amt
	Melon, Walter (0000002)	S104488AA	GI Medicine Clinical Trials Department (Michael McGill (0051696)) (S104488AA)	3412 - Clin/Tran Research Coord II	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-127.63
	Lear, Shanda (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-117.16
	Lear, Shanda (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-86.59
	Lear, Shanda (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-229.23
	Lear, Shanda (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-76.41
	Ander, Corey (0000007)	S104488AA	GI Medicine Clinical Trials Department (Michael McGill (0051696)) (S104488AA)	3412 - Clin/Tran Research Coord II	Regular (Hourly) (REG)					06/01/2023	06/30/2023	0.00	-241.61
	Ander, Corey (0000007)	S104488AA	GI Medicine Clinical Trials Department (Michael McGill (0051696)) (S104488AA)	3412 - Clin/Tran Research Coord II	Regular (Hourly) (REG)					06/01/2023	06/30/2023	0.00	-241.61

CR Fin – Labor Detail by Fiscal Period

(Filtered by Employee)

CR Fin - Labor Detail by Fiscal Period

Company *

Organization

Period *

Worktags

Pay Group

Filter Name

Manage Filters

0 Saved Filters

Save

OK

Cancel



Suggested Prompts



(Filtered by Employee)

Company Vanderbilt University Medical Center

Period FY23 - Jun

Organization Grant Hierarchy: GH CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts

Worktags Employee: Melon, Walter (0000003)

40 items

Journal	Journal Source	Cost Center Code	Cost Center	Ledger Account	Spend Category	Grant	Gift	Program	Project	Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR006875 4043900121 RDK128200-01 SPERMIDINE AS A NEW THERAPY FOR COLITIS AND CHE				FD004 Sponsored Program Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR011911 4043550253 RDK124385-02:ROLE OF AFRICAN-CENTRIC TP53 VARIANT IN HIGHE				FD004 Sponsored Program Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR013790 4043910401 PCA116087-16:H. PYLORI-INDUCED INFLAMMATION AND GASTR-CORE A				FD004 Sponsored Program Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC365 SWB: PTO	GR009954 4043553793 W81X WH-21-1-0617:TRANSLATIONA L IMPACT OF ELECTROPHILE ADDUCT				FD004 Sponsored Program Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC154 SWB: Regular	GR009954 4043553793 W81X WH-21-1-0617:TRANSLATIONA L IMPACT OF ELECTROPHILE ADDUCT				FD004 Sponsored Program Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC154 SWB: Regular	GR006875 4043900121 RDK128200-01 SPERMIDINE AS A NEW THERAPY FOR COLITIS AND CHE				FD004 Sponsored Program Fund
...	Payroll Forward Accrual	CC02862	CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts	5010:Staff Salaries: Non-Exempt	SC154 SWB: Regular	GR013790 4043910401 PCA116087-16:H. PYLORI-				FD004 Sponsored Program Fund

(Filtered by Employee)

Salary Over the Cap Type	Employee Name	Supervisory Org ID	Supervisory Org	Job Profile	Pay Component	Pay End Date	Pay Cycle Type	Pay Group	Check Date	Earns Begin Date	Earns End Date	VUMC Paid Hours	VUMC Paid Amt
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-117.16
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-86.59
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-229.23
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	PTO - non-exempt (PNS)					06/01/2023	06/30/2023	0.00	-76.41
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	Regular (Hourly) (REG)					06/01/2023	06/30/2023	0.00	-152.82
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	Regular (Hourly) (REG)					06/01/2023	06/30/2023	0.00	-234.32
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	Regular (Hourly) (REG)					06/01/2023	06/30/2023	0.00	-458.45
	Melon, Walter (0000003)	S104487AH	GI Medicine Research Department (Keith Wilson (0063344)) (S104487AH)	3876 - Histotechnologist Research	Regular (Hourly) (REG)					06/01/2023	06/30/2023	0.00	-458.45



CR Fin – Department Salary Trend for Grant or Award

- Who: Grants Manager or Grant Financial Analyst
- What: This report combines actual and obligation journals from payroll to trend salary and fringe by person for the prompted grant or award.
- Why: Used to manage labor trends for sponsored projects
- When: At least monthly or as often as needed to manage labor expenses.
- Notes: Payroll obligations build for the current fiscal year, or for research only through the award line end date. Narrow search using Budget Date less than or equal to filter.

CR Fin – Department Salary Trend for Grant or Award



CR Fin - Department Salary Trend for Grant or Award

Company for Organization Reporting



× Vanderbilt University Medical Center ...

Period



× FY23 - Jun ...

Organization

× Grant: GR007428
4043566122 SPARC
IBD:STUDY OF A
PROSPECTIVE ADULT
RESEARCH COHORT WITH ...

Award

...

Worktags

× Fund: FD004 Sponsored Program Fund ...

Budget Date less than or equal to (optional):

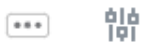
MM/DD/YYYY



OK

Cancel

CR Fin - Department Salary Trend for Grant or Award



Company for Organization Reporting [Vanderbilt University Medical Center](#)

Period [FY23 - Jun](#)

Organization [Grant: GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH](#)

Worktags [Fund: FD004 Sponsored Program Fund](#)

5 items



				Apr - FY23	May - FY23	Jun - FY23	Jul - FY24	Aug - FY24	Sep - FY24	Oct - FY24	Nov - FY24	Dec - FY24	Jan - FY24	Feb - FY24	Mar - FY24
Employee	Ledger Account	Grant	Fund	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total	Total
Shanda Lear (0123456)	5200:Faculty Salaries	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
Shanda Lear (0123456)	5575:Fringe Benefit Expense	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	400	400	400	400	400	400	400	400	400	400	400	400
Walter Mellon (0078965)	5010:Staff Salaries: Non-Exempt	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	800	800	800	800	800	800	800	800	800	800	800	800
Walter Mellon (0078965)	5575:Fringe Benefit Expense	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	200	200	200	200	200	200	200	200	200	200	200	200
Total				4,400	4,400	4,400	4,400	4,400	4,400	4,400	4,400	4,400	4,400	4,400	4,400



[?](#) WalkMe Menu:

CR Fin – Grant and Award Obligations

- Who: Grants Managers and Grant Financial Analyst
- What: Report provides a summary of payroll obligations to help trend salary by person including fringe.
- Why: This report is used to help manage spending on sponsored projects
- When: At least monthly or as often as needed to manage labor expenses.
- 💡 Notes: Obligations are recalculated on a biweekly schedule based on HCM transactions such as changes to costing allocations, new hires, terminations, compensation changes.

CR Fin – Grant and Award Obligations

CR Fin - Grant and Award Obligations

Company for Organization Reporting *

Period *

Organization

Award

Worktags

Budget Date less than or equal to (optional):



CR Fin – Grant and Award Obligations

5 items



Employee	Ledger Account	Grant	Fund	May - FY23	Jun - FY23	Jul - FY24	Aug - FY24	Sep - FY24	Oct - FY24	Nov - FY24	Dec - FY24	Jan - FY24	Feb - FY24	Mar - FY24	Total
Buzz Lightyear (3333333)	5200:Faculty Salaries	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	0	0	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	9,000
Buzz Lightyear (3333333)	5575:Fringe Benefit Expense	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	0	0	100	100	100	100	100	100	100	100	100	900
Peter Pan 5555555)	5010:Staff Salaries: Non-Exempt	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	0	0	250	250	250	250	250	250	250	250	250	2,250
Peter Pan (555555)	5575:Fringe Benefit Expense	GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH	FD004 Sponsored Program Fund	0	0	25	25	25	25	25	25	25	25	25	225
Total				0	0	1,375	1,375	1,375	1,375	1,375	1,375	1,375	1,375	1,375	12,375

Other Research Reports

CR Fin – Research Transaction Summary

- Who: Grants Managers and Grants Financial Analyst
- What: This report provides a summary of expense transaction amounts by account and period
- Why: To manage spend on sponsored projects
- When: Monthly or as needed to manage sponsored projects
- Notes: Subtotals for Direct and F&A expenses are provided

CR Fin – Research Transaction Summary

CR Fin - Research Transaction Summary

Company *

Organization

Year *

Period

Worktags



OK

Cancel

CR Fin - Research Transaction Summary



Company Vanderbilt University Medical Center

Year FY23

Organization Grant: GR005616 4043567345 M16-0066:EFFICACY AND SAFETY OF RISANKIZUMAB IN SUBJECTS WIT
Grant: GR007428 4043566122 SPARC IBD:STUDY OF A PROSPECTIVE ADULT RESEARCH COHORT WITH

8 items

Ledger Account	Jul - FY23	Aug - FY23	Sep - FY23	Oct - FY23	Nov - FY23	Dec - FY23	Jan - FY23	Feb - FY23	Mar - FY23	Apr - FY23
5000:Staff Salaries: Exempt	0	0	0	0	0	0	0	(31,319.06)	0.00	
5010:Staff Salaries: Non-Exempt	7,512.16	5,975.91	6,320.99	6,744.05	6,786.35	7,078.50	6,776.62	6,078.84	(2,363.56)	808.5
5200:Faculty Salaries	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.67	2,916.6
5575:Fringe Benefit Expense	2,543.50	2,111.74	2,239.18	2,330.14	2,344.00	2,425.71	2,338.58	(6,874.93)	(278.43)	624.5
6250:Research And Education	100.00	1,457.35	123.66	162.06	165.11	482.99	974.63	2,353.11	2,612.25	1,787.5
Direct Costs	13,072.33	12,461.67	11,600.50	12,152.92	12,212.13	12,903.87	13,006.50	(26,845.37)	2,886.93	6,137.3
F&A Total	1,326.23	1,523.06	1,183.54	1,246.09	1,252.58	1,382.16	1,485.83	(2,237.45)	785.02	953.3
Total Expense	\$13,072	\$12,462	\$11,601	\$12,153	\$12,212	\$12,904	\$13,007	(\$26,845)	\$2,887	\$6,13



WalkMe Menu:

REPORT DEMO



CR Fin - Department Account Activity

- Who: Cost Center Manager, Cost Center Financial Analyst, Cost Center Financial Analyst with Payroll Details, Grant Manager, Grant Financial Analyst, Gift Manager, Gift Analyst, Program Manager, Program Financial Analyst, Project Financial Analyst
- What: Report provides beginning balance, activity and ending balance by ledger account.
- Why: Users can manage projects using this report that is drillable to obtain details of transactions.
- When: Monthly or as needed to manage sponsored projects.
- Notes: Users may limit result to activity in a specific fund type in combination with the Organization selected.

CR Fin - Department Account Activity

CR Fin - Department Account Activity

Company *

Organization *

Period *

Worktags



OK

Cancel

CR Fin - Department Account Activity



Company [Vanderbilt University Medical Center](#)

Period [FY23 - Jun](#)

Organization [Grant Hierarchy: GH CC02862 Medicine - Gastroenterology Div - CD Acad Grants Gifts](#)

34 items



Ledger Account	Beginning Balance	Debit Amount	Credit Amount	Ending Balance
6000:Medical Supplies	3,138.38	4,837.83	3,631.84	4,344.37
6010:Non-Medical Supplies	595,825.07	120,250.31	78,647.75	637,427.63
6015:Non-Medical Supplies Book To Physical Adjustment	0.00	0	0	0.00
6100:Machinery And Equipment	10,990.00	96.00	96.00	10,990.00
6110:Maintenance And Repairs	16,603.70	1,065.55	894.00	16,775.25
6200:VU Expense	238,298.29	70,089.57	6,320.76	302,067.10
6210:Professional Services Expense	0.00	0	0	0.00
6220:Subcontracts	1,185,559.92	377,310.94	147,931.64	1,414,939.00
6240:Insurance Expense	0.00	0	0	0.00



[?](#) WalkMe Menu:

REPORT DEMO



Training Updates

New Guides

Research PCA

Costshare
FAQ

Pro Forma Effort
Certification
Report

Invoice Payment
Status Report

Research and
Grants Workday
Reports

Training Hub

- Leaders should check the MyWorkday dashboard to ensure their teams have completed required training
 - [Workbook: MyWorkday Curriculum Dashboard](#)
- Quick Reference Guides can be found on the [MyWorkday Training Hub](#)

The screenshot shows the MyWorkday Implementation page with the 'Training Hub' tab selected. The page title is 'MyWorkday Implementation' and the selected tab is 'Training Hub'. Below the navigation bar, the 'Training Hub' section is displayed with the heading 'Expand the sections below for more information.' and a list of links: 'Curriculum Completion Dashboard **for Managers Only** (Tableau)', 'Training Curriculum >', 'Workday Workshop Recordings >', 'What's Happening Videos >', 'Workday Role - Training Guides >', and 'Supplemental Quick Reference Guides (incl. Pegasus Ticket Guides) >'. The last link is highlighted with a blue box.

Research Admin Newsletter

- Distributed twice a month
- [Subscribe here!](#)
- Previous issues are available [here](#).



JULY 24, 2023

ISSUE 3

In This Issue:

- Quick Tips: Changing Search Preferences in Workday
- Portfolio Managers for Finance Post-Award Activities
- Required Abstract/Pre-Application for ARPA-H BAA Applications
- WalkMe Menu Now Available in Workday
- Spotlight On: Supplier Invoices
- VUMC iLab Billing Number Activation & Management

Workday Research Townhall Recordings

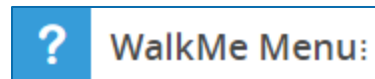
- Research Procurement Townhalls 7/20 and 8/4
 - <https://www.vumc.org/myworkday/training-hub>
[Monthly](#)
- Be on the lookout for invites to upcoming Research Townhalls hosted by VUMC Finance.

Research Town Halls - Recordings ▾

Topic	Original Date	Presentation	Recording	Q&A
Research Procurement Town Hall #1	Thursday, 7/20		View Here	
Research Procurement Town Hall #2	Friday, 8/4	Slides	View Here	

WalkMe Extension

- WalkMe 'Guide Me' Assistance is available for key workflows
 - Updating Personal Information
 - Purchasing
 - Receiving
 - Expense Reports
 - Delegation
 - Payroll Costing Allocations
 - PTO

A screenshot of a "Requisition Details" form. The form is titled "Requisition Details" and contains several sections: "Learning Operations" (with a mouse cursor pointing to it), "Operating Entity" (with a dropdown menu showing "Operating Entity: OEMCA Medical Center Administration"), "Additional Worktags" (with a dropdown menu showing "Function Code: FC23023 Institutional Support - General Administration"), "Deliver-To Location*" (with a dropdown menu showing "2525 WEST END AVE (LOC00248)"), and "Ship-To Address*" (with a dropdown menu showing "2525 WEST END AVE, NASHVILLE, TN 37203, United States of America"). Each dropdown menu has a close button (X) and a menu icon (three horizontal lines).

[WalkMe Add-in Manual Installation & Macs](#)

Questions?