FI$Cal
Wave 1 and 2 – Grants Sponsors and Institutions Configuration Workshop

November 4, 2014
Department Configuration Workshop - Objectives and Outcome

Objectives

- Define configuration values to support FI$Cal Wave 1 & 2 functionality
- Produce configuration data entry spreadsheets for each configuration build work unit
- Configuration consists of project-defined and department-defined values
- Validate configuration data entries with key business users, project management, and where applicable, department stakeholders

Outcome

- Configuration build will be the basis for what configuration values will be loaded into the FI$Cal system for Wave 1 & 2.

Configuration: Set-up values within the application.
Agenda

Configuration Topics:

• Institutions
• Sponsors
• Sponsored Projects Office (SPO)
• Reporting Structures
• Grants Milestones
• Facilities and Administration (F&A)/Indirect Cost
Institutions

- Define the organization that is applying for and receiving funding. Normally this is the business unit (department) profile.
- Demographic details such as names and addresses.
- Institution name will print on proposal forms and financial status reports.
- Contact details (optional).
- Certification and compliance details such as types, dates, and ID numbers (optional).
  - Note: Optional configuration – fields that can be used for reporting and can map to proposal forms.
Institution Worksheets

• Demographic
  • INSTITUTION
  • INSTITUTION TYPES
  • INSTITUTION INFORMATION
  • INSTITUTION ATTRIBUTES
  • INSTITUTION ADDRESSES

• Contacts - optional
  • INSTITUTION CONTACTS
  • INST CONTACTS DATES
  • INST CONTACTS
  • INST PHONE
Institution Worksheets (continued)

- Certification and Compliance - optional
  - CERTIFICATIONS TBL
  - INST CERTIFICATIONS
  - INST CERT DETAILS

Sponsors

• The granting entity – for example, the National Institutes of Health (NIH).

• Required on proposals and awards.

• Built on the Customer table.

• Fields provided for categorizing sponsor hierarchies, program types, sponsor types, and additional attributes (optional).

Note: Optional configuration – fields that can be used for reporting and can map to proposal forms.
Sponsors

Attributes - optional

- SPONSOR LEVELS
- PROGRAM TYPES
- SPONSOR TYPES
- SPONSOR ATTRIB DATES
- SPONSOR ATTRIB
Sponsored Projects Office (SPO)

• Internal Grants office details.
• Optional.

Note: Optional configuration – fields that can be used for reporting and can map to proposal forms.
Sponsored Projects Office (SPO)

Organizational - optional

- SPO OFFICIAL
- SPO ID
Departments (Reporting Structure)

- Key field in proposal/award for assigning revenue.
- Demographic details (optional).
- Contacts (optional).
- Can be configured to default Reporting Structure, Institution, SPO, and location into proposals.

Note: Optional configuration – fields that can be used for reporting and can map to proposal forms.
Departments (Reporting Structure)

- Demographic – optional
  - DEPT SUBDIVISION
  - DEPT ADDRESS
  - DEPT ATTRIBUTES
- Contacts - optional
  - DEPT CONTACT
  - DEPT CONTACT DT
  - DEPT CONTACT PHONE
  - DEPT CONTACT TYPE
Milestones

- Can be used for workflow notifications. Ex: send notification 30 days prior to a report’s due date as a reminder.
- Create high level Milestone groups with detailed Milestones that roll up.
- Can be configured to automatically populate proposals.
- Optional.

Note: Optional configuration – fields that can be used for reporting and can map to proposal forms.
Milestones

• Grants Email Notifications - optional
  • MILESTONE TYPE
  • MILESTONE CODE
Facilities and Administration (F&A)/Indirect Cost

• Categorize indirect rates into groups or types.
• Define rates for institution and sponsors.
• Create Budget Items and use for budgeting indirect costs.
• Define accounting defaults for indirect accounting entries.
Facilities and Administration (F&A)/Indirect Cost

- Rates - required
  - RATE TYPE
  - INSTITUTION FA AGREEMENT
  - INSTITUTION FA RATE
  - SPONSOR FA RATE DETAIL
  - SPONSOR FA RATE

- Budgeting - required
  - FA BASE DTL
  - FA BASE CAT

- Accounting - required
  - FA OPTION
  - FA OFFSET

Questions