

The Next Generation



FI\$Cal

Financial Information System for California

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

