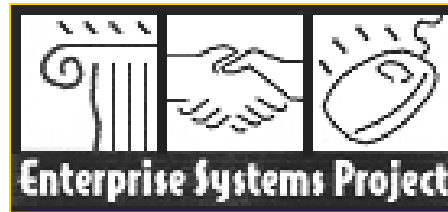


UNIVERSITY OF MINNESOTA



Enterprise Financial System (EFS)

Sponsored Reports & Queries
Grants Management User Network

January 24, 2008



EFS Project Update

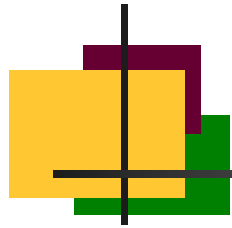
- Objectives:
 - New/Old Data
 - Delivered Reports
 - Queries
 - Q & A





New Data or Old Data

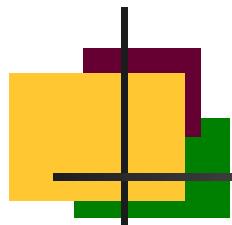
- Old data will be accessible via the data warehouse or the legacy system
- New data will be accessible via PS online screens, query tools or delivered reports
- Comparisons between data or fiscal years will be manual



Delivered Reports

■ Sponsored Award Summary

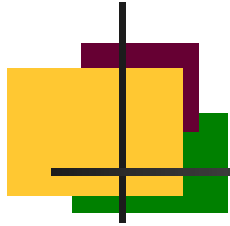
UNIVERSITY OF MINNESOTA										
SPONSORED AWARD SUMMARY										
Report ID:	UMGM014A								Page No:	1
									Run Date:	2/22/2007
									Run Time:	6:02:36 PM
ACTIVE SPONSORED AWARDS FOR PRINCIPAL INVESTIGATOR: COLETTE PETERS										
Home Department:	Chemistry									
<u>AWARD</u>	<u>PRIMARY PROJECT</u>	<u>TITLE</u>	<u>SPONSOR</u>	<u>DEPARTMENT</u>	<u>START DATE</u>	<u>END DATE</u>	<u>% Complete</u>	<u>% Spent</u>	<u>AWARD AMOUNT</u>	<u>AWARD BALANCE</u>
CON00000123	000072	Freezing Tree Frogs	NIH	Biology	9/1/2006	3/31/2007	12%	10%	\$ 250,000.00	\$ 225,000.00
CON00000134	000135	Retail Therapy	VISA	Mechanical Engineering	9/1/2006	12/31/2007	35%	50%	\$ 500,000.00	\$ 250,000.00
CON00000135	000138	Go PeopleSoft!	Oracle	Management Information Systems	9/1/2006	7/1/2008	55%	45%	\$ 1,750,000.00	\$ 962,500.00
CON00000157	000175	Insulin in Lab Rats	NIH - NEI	Chemistry	1/2/2007	3/31/2009	30%	20%	\$ 100,000.00	\$ 80,000.00
CON00000167	000193	Chicken or Egg?	Purdue	Agricultural Science	2/1/2007	3/31/2008	5%	30%	\$ 1,000,000.00	\$ 700,000.00
CON00000188	000204	ED in Men with Diabetes	U of Wisc	Chemistry	3/1/2007	3/31/2010	0%	0%	\$ 750,000.00	\$ 750,000.00



Delivered Reports

■ Sponsored Award Overview

UNIVERSITY OF MINNESOTA SPONSORED AWARD OVERVIEW										
Report ID:	UMGM014A						Page No:	1		
						Run Date:	2/22/2007			
						Run Time:	6:02:36 PM			
CON0001234 - THE EFFECTS OF INSULIN ON LAB RATS										
Award Sponsor:	National Institutes of Health					Award Amount:	\$ 1,524,637.81			
Award Start Date:	1/16/2006		Award End Date:	7/1/2008		Cost Share:	\$ 55,500.00			
Award Time Elapsed:	40%					Program Income:	\$ 13,500.00			
Award Spent:	70%					Total Award:	\$ 1,593,637.81			
F&A:	INSTR	MTDC	49.50%			Invoiced:	\$ 4,129.56			
						Open AR:	\$ 1,573.24			
PROJECT	PRIMARY	PI	BUDGET ITEM	BUDGET AMOUNT	PRE-ENC. AMOUNT	ENCUMBRANCE AMOUNT	EXPENSE AMOUNT	AVAILABLE BALANCE		
000035	Y	Smith, John	TRAVL_MILE_MOVE	\$ 1,000.00			\$ 1,021.36	\$ (21.36)		
			FACULTY_SALARY	\$ 350,000.00		\$ 10,000.00	\$ 20,000.00	\$ 320,000.00		
			GRAD_STU_SALARY	\$ 150,000.00		\$ 10,000.00	\$ 20,000.00	\$ 120,000.00		
			FACULTY_FRINGE	\$ 87,500.00		\$ 3,000.00	\$ 6,000.00	\$ 78,500.00		
			GRAD_STU_FRINGE	\$ 42,000.00		\$ 2,500.00	\$ 5,000.00	\$ 34,500.00		
			GEN_OP_SUPPLIES	\$ 35,000.00	\$ 2,300.00	\$ 1,523.68	\$ 12,000.00	\$ 19,176.32		
			NON_CAP_EQUIP	\$ 45,000.00	\$ 2,500.00		\$ 38,000.00	\$ 4,500.00		
			SUB_WTH_FACADM	\$ 150,000.00		\$ 45,000.00	\$ 105,000.00	\$ -		
			FACADM	\$ 403,672.50			\$ 83,665.57	\$ 320,006.93		
			PROJECT TOTALS	\$ 1,264,172.50	\$ 4,800.00	\$ 72,023.68	\$ 290,686.93	\$ 896,661.89		
000036		Smith, Jane	TRAVL_MILE_MOVE	\$ 2,000.00			\$ 500.00	\$ 1,500.00		
			FACULTY_SALARY	\$ 102,000.00		\$ 50,000.00	\$ 50,000.00	\$ 2,000.00		
			FACULTY_FRINGE	\$ 22,338.00		\$ 10,000.00	\$ 10,000.00	\$ 2,338.00		
			GEN_OP_SUPPLIES	\$ 18,000.00	\$ 350.00	\$ 745.00	\$ 12.00	\$ 16,893.00		
			NON_CAP_EQUIP	\$ 13,000.00	\$ 7,500.00		\$ 32,056.78	\$ (26,556.78)		
			FACADM	\$ 103,127.31			\$ 29,953.44	\$ 73,173.87		
			PROJECT TOTALS	\$ 260,465.31	\$ 7,850.00	\$ 60,745.00	\$ 122,522.22	\$ 69,348.09		
000037		Doe, Jane	TRAVL_MILE_MOVE	\$ 3,500.00			\$ 500.00	\$ 3,000.00		
			FACULTY_SALARY	\$ 100,000.00		\$ 50,000.00	\$ 50,000.00	\$ -		
			FACULTY_FRINGE	\$ 20,000.00		\$ 10,000.00	\$ 10,000.00	\$ -		
			GEN_OP_SUPPLIES	\$ 3,500.00		\$ 1,523.68	\$ 764.87	\$ 1,211.45		
			NON_CAP_EQUIP	\$ 50,000.00	\$ 7,500.00		\$ 32,056.78	\$ 10,443.22		
			SUB_WTH_FACADM	\$ 150,000.00		\$ 45,000.00	\$ 105,000.00	\$ -		
			FACADM	\$ 161,865.00			\$ 30,326.11	\$ 131,538.89		
			PROJECT TOTALS	\$ 488,865.00	\$ 7,500.00	\$ 106,523.68	\$ 228,647.76	\$ 146,193.56		
			AWARD TOTALS	\$ 1,524,637.81	\$ 12,650.00	\$ 132,768.68	\$ 413,209.15	\$ 966,009.98		



Delivered Reports

■ Sponsored Transaction Detail

User Input:

Project Number: 000006
 Date From: 02/01/2007
 Date To: 02/28/2007

University of Minnesota Sponsored Transaction Detail – Expenses

Project Information

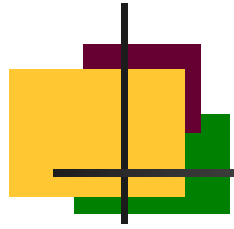
Project Number: 000006
Contract Number: CON00000000031
Sponsor: National Institutes of Health
Department: Pharmacology
Project Title: Effects of Insulin on Laboratory Rats
Project Start Date: 01/01/2007
Project End Date: 12/31/2012

Project	Accounting Date	Account	Document Number	Actuals			Cost Share			Doc Description	Vendor
				Budget	Requisitions & Commitments	Expenses	Budget	Requisitions & Commitments	Expense		
000006	02/01/2007	700000	297856430	20,000.00					Salary		
000006	02/01/2007	710000	297856430	8,000.00					Fringe		
000006	02/01/2007	700000	297856430				2,000.00		Salary		
000006	02/01/2007	710000	297856430				800.00		Fringe		
000006	02/01/2007	720000	123456789	10,000.00					Supplies		
000006	02/01/2007	720000	234567890		5,000.00				Supplies	Joe's Med Equip	
000006	02/05/2007	720000	265853248		(5,000.00)				Supplies	Joe's Med Equip	
000006	02/05/2007	720000	278943219		5,000.00				Supplies	Joe's Med Equip	
000006	02/10/2007	700100	342657987			1,889.99			Salary		
000006	02/10/2007	700100	342657987						Salary		
000006	02/10/2007	710100	342657988			756.00			Fringe		
000006	02/10/2007	710100	342657988						Fringe		
000006	02/28/2007	720000	465421327		(5,000.00)				Supplies	Joe's Med Equip	
000006	02/28/2007	720100	549854613			4,999.99			Supplies	Joe's Med Equip	
TOTAL				38,000.00	0.00	7,645.98	2,800.00	0.00	264.59		



Delivered Reports

- Fixed Price Awards
- Budget Period Expense Summary
- Aged Pre-award Report
- Award Contracts in Deficit
- Expense Activity by contract report/billing ID
- Report/Invoice Status & Timeliness reports
- Proposal/Award Tracking reports



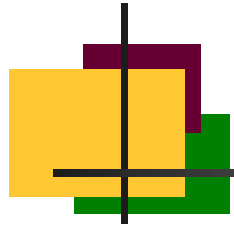
Queries

- Many system oversight queries will be developed for several purposes – gather data, data integrity and grants management monitoring
 - Cost Share query
 - To check start and end dates across the various modules & screens
 - Identify Clinical Trial revenue received over 25% of the original estimates



Approach

- Did not recreate all sponsored reports on the web available today
- Identified several key reports for go live
- Many online screens that allow data to be exported to excel
- Post implementation identify additional needs for reports/queries



Access

- Role created specific to sponsored departmental users
 - Online view access to Grants, Projects, Contracts, Accounts Receivable
 - View status of proposal/award
 - View terms & conditions
 - Access to run sponsored reports & queries
 - Generate a NOGA



Training

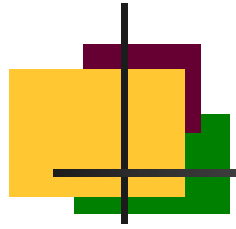
- Overview of the administration of a sponsored project
 - Distributed Breeze presentation
 - High-level overview of the lifecycle of a project
 - What procedures are changing
 - Links to resources and job aids to explain GPC screens & reports



Resources

- Web site: www.finsys.umn.edu
- Email: finsys@umn.edu
- BPOs
- Team leads
- Subject matter experts
- Meetings like this!





What are Your Questions?



- Sue Paulson spaul@umn.edu
- 612-624-5007

