

Adding a New Cost Center

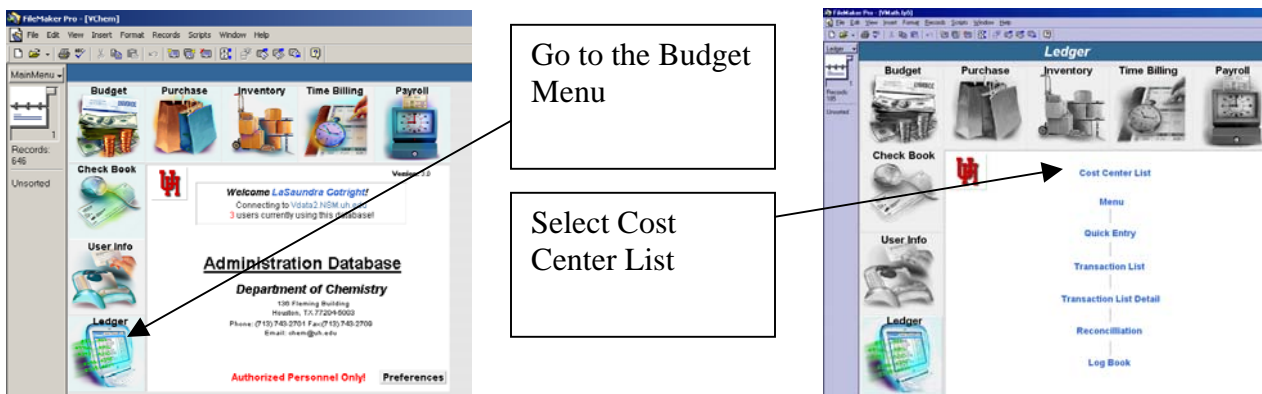
Revised 6/8/07

Adding a New Cost Center in FMP includes data entry in the following areas of the FMP database.

- I. Account Info
- II. Budget Input Record in Ledger
- III. Monthly Summary Record in Ledger (for IDC encumbrances only)

I. Entering information in Account Info Database

Access the Account Info database as follows:



BROWSE Find New Sort Print Chemistry Award Entry View Archived MAIN MENU View Ledger Archived

Account Status Summary List View

Account Title: Sample Project Title (Test Record) Sponsor: NSF
 Sponsor ID: 01-100505 Reconciled Date:
 Rec. By: Felicia

Begin Date: 05/01/2007 Matching Fund: No IDC Rate: 49.00% (enter as decimal eg 0.12 for 12%)
 End Date: 04/30/2008 Cost Sharing: No Cost Share Types: FDP: Yes
 Project Years: 3 Grant Type: Cost Reimbursable

PI Name: LaSaundra Cotright PI Short: Cotright User Id.: lcotright E-mail: lcotright@uh.edu E-Mail PI

| FRS Acct | Sub Acct | Bus. Unit | Fund | Dept | Program | Project | Speed Type | Sub Ledger | Fiscal Yr | Status |
|----------|----------|-----------|------|-------|---------|---------|------------|------------|-----------|--------|
| | | 00730 | 5013 | H0107 | B0001 | G12345 | 12345 | | | Active |

Record: 3

Found: 3
Total: 653
Unsorted

| Award No | Award Amounts | Award Date | Document No | Award Comments |
|----------|---------------|------------|-------------|--------------------------|
| 1 | 100,000.00 | 4/30/2007 | NOA | Year 1 of 3 year project |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |
| 14 | | | | |
| 15 | | | | |
| 16 | | | | |
| 17 | | | | |
| 18 | | | | |
| 19 | | | | |
| 20 | | | | |

Account Award: \$100,000.00

AccountComments: NSF expects to continue support at: Year 2 -\$110,000; Year 3-\$110,000 lbc 5/1/07.

Comments:

Usage: As budgeted. For Participant support costs use account code 54817. Online View:

1. Perform a FIND request to determine whether the cost center is already in the database: Click on the Find button and enter the FRS number in the FRS Acct field. Press the Enter key.
 - a. If the account does exist, proceed to step 2 and verify and data enter information from the Notice of Award/Mod.
 - b. If the Account does not exist, click on the NEW button and proceed to Step 2 for data entry.
2. Data Enter the information from the Notice of Award/Modification form.
 - a. Account Title
 - b. Sponsor: the granting agency (NSF, Welch, PRF, GEAR, ARP, etc)
 - c. Begin Date
 - d. End Date
 - e. PI Short: Last name of the PI, or if a departmental Account, type "Department"
 - f. User ID: PI's FMP user id. You can obtain this user id from the User Info Screen. See box to the right.
 - g. PI Name: this field autopopulates once the user id is entered.
 - h. Email: this field autopopulates once the user id is entered.
 - i. Cost Center Values: Business Unit, Fund, Dept, Program, Project, Speedtype
 - j. Award Amount: Amount indicated on the NOA/Mod form. (for grants and HEAF awards only)
 - k. Award Date: Date on the Notice of Award/Award Mod form.
 - l. Award Comments: Enter "NOA" for Notice of Award. Enter Mod 1, Mod 2, Mod 3, etc. for each of the Mods. Note: If the cost center information was provided to the department prior to receipt of the Notice of Award, "NOA pending" or "Mod pending" should be typed in the Award Comments box. Once the NOA/Mod is received, the word "pending" can be removed.
 - m. Account Type: Grant, Fee, Chair, Donor, etc.
 - n. Cost Share: If the "Cost Sharing Requirements" section of the NOA indicates that cost sharing is required, select "Yes" from this field and make a note of what type of cost sharing is required in the Account Comments Box.
 - o. Cost Share Type: Select the cost share type from the drop down menu (Time and Effort, Equipment, IDC, Time and Effort & Equipment, etc)
 - p. Account Comments: Indicate important notes here.
 - q. Usage: indicate any special restrictions or allowances outlined in the Notice of Award/Mod form (Example: No Travel, Equipment only, No salaries, etc).

USER ID

"PI Name" and "Email" fields will populate once the user id is input. You can obtain the User Id from the User Info Screen. Navigate as follows:

- Go to the Main Menu
- Select User Info
- Select User List
- Scroll the list or perform a FIND request for the name you are looking for.

II. Budget Input

Select the "Create Budget Input" button to post the Budget to the Budget Input record. Follow the prompts. Enter the budget categories as shown on the NOA/Mod.

Budget Input

Layout:
BudgetIn

Record:
1

Found:
1

Total:
51512

Unsorted

Script:

Continue

Cancel

BUDGET INFORMATION

Document Type: Budget Input

Speed Type: 12345

Sub Acct:

Account Code:

Sponsor:

Description: Year 1 of 3 year project 4/30/2007

Document #: NOA

Reference #:

Entered By: LaSaundra Cotrig

BUDGET CATEGORY

Start Amount: 100,000.00

START AMOUNT
CAN BE DIFFERENT
FOR A NEW COST CENTER

| | | |
|--|-----------|---|
| <input checked="" type="checkbox"/> Salary | 35,000.00 | <ul style="list-style-type: none"> <input type="checkbox"/> B5034 - Tenure Track Faculty 10,000.00 <input type="checkbox"/> B5035 - Non Tenure Track Faculty <input type="checkbox"/> B5036 - Adjunct Faculty <input type="checkbox"/> B5037 - Graduate Assistists 20,000.00 <input type="checkbox"/> B5038 - Exempt Staff <input type="checkbox"/> B5039 - Non Exempt Staff <input type="checkbox"/> B5040 - Student Workers 5,000.00 <input type="checkbox"/> B5055 - Summer Instruction <input type="checkbox"/> Salary (50100-50120) |
| Fringe Benefits | 9,000.00 | |
| M & O | 20,000.00 | |
| Travel | | |
| Equipment | | |
| SubAward(< = 25K) | | |
| SubAward(> = 25K) | | |
| Participate Cost | 3,115.00 | |
| IndirectCost | 32,885.00 | |
| Equity | | |

III. IDC Encumbrance

For grants, create a Monthly Summary Record to enter the IDC shown on the NOA/Mod.

Record:
2

Found:
2

Total:
51516

Unsorted

| FY | Speed Type | SubAcct | Type | Acct Code | | |
|------|------------|---------|---------|-----------|------------------------|--|
| 2007 | 12345 | ... | Monthly | 56504 | IDC: IND CST-ON CAMPUS | |

| Individual | Initial Balance | Encumbered Remaining | Status: |
|---|-----------------|----------------------|---------|
| Year 1 IDC (5/1/07-4/30/08) \$32,885 NOA | 32,885.00 | 32,885.00 | |

| EmpID: | Expended | Reconciled Date | Note |
|----------------------|----------|-----------------|------|
| <input type="text"/> | SEP | | |
| <input type="text"/> | OCT | | |
| <input type="text"/> | NOV | | |
| <input type="text"/> | DEC | | |