Develop Proposals and Manage Sponsored Projects with InfoEd, NUFinancials and Cognos

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http://www.it.northwestern.edu/admin-systems/
What are IT Administrative Systems?

- NUFinancials, InfoEd, Cognos, MyHR, iBuyNU, NUPlans, and FAMIS
  - Customized to interface with each other.
  - Customized to Northwestern’s business processes.
  - Supported by IT teams.
InfoEd

- InfoEd Proposal Tracking and Proposal Development
  - View Pre and Post Award information
  - Personnel, Budget, and Effort
InfoEd Proposal Development!

What is InfoEd PD?

• A shared-access system for preparing, approving and submitting all proposals.

• System-to-system: data entered in the local system is submitted directly to another system, for Grants.gov proposals.

• Became mandatory on April 1, 2012.
NUFinancials

- View Post Award information
- Enter transactions & view real-time budget info
- Real time data
Cognos

- Reports on InfoEd and NUFinancials data

### Sponsored Project Budget Statement

**For Fiscal Year 2013**

**As of Accounting Period 9 - May 2013 (Closed)**

**Project:** 60029312 - Molecular Biophysics Training

<table>
<thead>
<tr>
<th>Account &amp; Description</th>
<th>Fund</th>
<th>Dept</th>
<th>Activity TD</th>
<th>(A) Incap-TD Budget</th>
<th>(B) Current Period Exp</th>
<th>(C) FY-TD Exp</th>
<th>(D) Incap-TD Exp</th>
<th>(E) Open Req Enc</th>
<th>(F) Budget Checked Not Posted</th>
<th>(A-E-F) Bal Remaining</th>
<th>(A-E-F) % Available</th>
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## Sponsored Research Stages!

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<thead>
<tr>
<th>Stage</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Proposal Submission</td>
<td>Create and submit the proposal</td>
</tr>
<tr>
<td>PreAward</td>
<td>Update proposal as requested from sponsor</td>
</tr>
<tr>
<td>Award Start-up</td>
<td>Manage the set-up of the actual budget</td>
</tr>
<tr>
<td>Post Award Management</td>
<td>Spend/monitor expenses on award budget</td>
</tr>
<tr>
<td>Award Closeout</td>
<td>Finalize, correct, submit</td>
</tr>
</tbody>
</table>
What classes should I take?  
Grant-related

- FMS502 InfoEd Proposal Development
- FMS503 InfoEd Approvals (online)
- FMS504 Reports in Sponsored Research (online)
- FMS505 Managing Sponsored Projects
- FMS507 Clinical Trials Proposals in InfoEd

https://learn.northwestern.edu

Recommended Grants Training Plan!

You can register for classes in myHR Learn!
What other classes should I take?

Introductory
• FMS807 Expense Reports
• FMS832 Payment Requests
• FMS112 Run and Schedule Reports
• FMS803 Requesters Basic Topics
• FMS801 Shopping in iBuyNU

Intermediate
• FMS711 Actuals Journals
• FMS722 NUFinancials Budget Searches

Advanced
• FMS723 Reconciling your Budgets
• FMS815 Requesters Advanced Topics
Anymore? I love classes!

Online:
- FMS804 Approvals and Workflow
- FMS720 NUFinancials Budget Adjustments
- FMS816 Receipts
- FMS900 FAMIS Service Requests

NUPlans
- Budgeting and Forecasting classes

myHR
- HRS101 myHR Lookup
- HRS102 myHR Deployment Funding
- HRS401 Position Data/Appointment Forms

Effort Reporting
Your Education Action Plan!
(learning comes in many forms)

1. Take some classes!
2. Join NURAP!
3. Join listservs for OSR, ASRSP, NURAP, Financial Operations!
4. Network!

http://www.it.northwestern.edu/admin-systems/training/financial/getting-started.html
http://www.it.northwestern.edu/admin-systems/training/financial/sequence.html

Come see us soon!