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

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What is NUIT Administrative Systems?

• Several teams which support and work on enhancements and upgrades for:
  – NUFinancials, InfoEd, Cognos, iBuyNU, NUPlans and FAMIS
    • Customized to interface with each other.
    • Customized to NU’s business processes.

• Project Management Office and Enabling Technologies team:
  – Consult, coordinate, manage projects across the NU Community with Project Management resources
InfoEd, NUFinancials, Cognos

- 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.

- New: Upgrade in September 2015!
InfoEd, NUFinancials, Cognos

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

- Cognos
  - Reports on InfoEd and NUFinancials data

### Sponsored Project Budget Statement
For Fiscal Year 2013
As of Accounting Period 9 - May 2013 (Closed)

<table>
<thead>
<tr>
<th>Account &amp; Description</th>
<th>Fund</th>
<th>Dept</th>
<th>Activity</th>
<th>(A) Incorp-TD</th>
<th>(B) Current Period Expend</th>
<th>(C) FY-TD</th>
<th>(D) Incorp-TD</th>
<th>(E) Open Req Enc</th>
<th>(F) Budget Checked</th>
<th>(A-D-E-F) Bal Remaining</th>
<th>(A-D-E-F) % Available</th>
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NUIIT Administrative Systems
Sponsored Research Stages!

- **Proposal Submission**: Create and submit the proposal.
- **Pre-Award**: Update proposal as requested from sponsor.
- **Award Start-up**: Manage the set-up of the actual budget.
- **Post Award Management**: Spend/monitor expenses on award budget.
- **Award Closeout**: Finalize, correct, submit.
What classes should I take? Grant-related

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

http://ffra.northwestern.edu/secure/training/fms505-grants-training-plan.html

You can register for classes in FASIS Self Service!
What other classes should I take?

Introductory
- FMS807 Expense Reports
- FMS832 Online Voucher & Payments
- FMS112 Running and Scheduling Reports
- FMS803 Requesters Basic Topics
- FMS801 Shopping in iBuyNU

Intermediate
- FMS711 Correction, Transfer and Internal Sales 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

FASIS
• HRS101 FASIS Lookup
• HRS102 FASIS 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://ffra.northwestern.edu/training/gettingstarted.html
http://ffra.northwestern.edu/training/sequence.html

Come see us in classes soon!