# Sponsored Research Projects User Manual

Version 3.5
March 2014

FAMIS Services
The Texas A&M University System

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# Introduction

The purpose of this manual is to assist in accessing and utilizing information in the Sponsored Research section of Financial Accounting Management Information System (FAMIS). FAMIS is an accounting system that responds to financial regulations applicable to educational institutions. All applications access a common database that allows different users to access identical information. Other applications include Financial Accounting, Accounts Payable, Accounts Receivable, Purchasing and Fixed Assets. Manuals for these applications are being developed or are currently available.

The materials are grouped according to Sponsored Research functions. All associated screens and processing information are included along with field descriptions. The required fields are designated by a diamond symbol (◆). Data entry information (**Help**) can be accessed on some screen fields with the use of the ***PF2*** key or typing an asterisk (*) or question mark (?) in the field.

By utilizing the information and guidelines contained in this manual, a user should be able to access sponsor information, create and modify sponsors, proposals, awards, and projects.

The FAMIS User Manuals are in a constant state of revision, due to screen updates, changes in procedures, or any one of a multitude of reasons. If you would like to make suggestions or call attention to errors, please contact us at (979) 458-6464, or copy the page with the error, note the correction or suggestion and send it to:

| | |
|---|---|
| College Station based: | FAMIS Services<br>The Texas A&M University System<br>1144 TAMU<br>College Station, TX 77843-1144 |
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# SPR Menu Screens

The main menu for SPR lists the other menus that are available. This list will direct you to other menus and screens for detail Sponsor or Proposal information.

### 001 - SPR Main Menu Screen

```
001 SPR Main Menu Screen                                        11/04/13 13:37
                                                                 FY 2014 CC 02
Screen: ___


 M01  Sponsor and Researcher Menu         S01  SPR System Table Menu
 M02  Proposal Maintenance Menu           S02  Batch Submission Menu
 M03  Proposal Inquiry Menu

 M06  Entire Connection Download/Print

 M10  Project / Proposal Transfer Menu    AFR  Annual Financial Reporting
 M11  Project Maintenance  Menu           FFX  Fixed Assets Module
 M12  Project Inquiry Menu                FRS  Financial Records System
 M13  Cost Sharing Menu                   GCP  General Construction Projects




Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  Pers  SOR
```

### Menu M10 - SPR Project Proposal Transfer Menu

```
M10 SPR Project Proposal Transfer Menu                          11/04/13 13:38
                                                                 FY 2014 CC 02
Screen: ___

                         Transfer Screens

                    101  Project & Award Create from a Proposal
                    102  Award Only Create from a Proposal
                    103  Proposal Create from Project / Award









Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Menu M11 - SPR Project Maintenance Menu

```
M11 SPR Project Maintenance Menu                                  11/04/13 13:39
                                                                   FY 2014 CC 02
Screen: ___


                      Project Maintenance Screens

110  Project Add Begin                    121  Project Compliance Codes
111  Project General Information - 1      122  Project NSF and THECB Codes
112  Project General Information - 2      123  Project Comments
113  Award Information Maintenance        124  Project Note log
114  Researcher Award Distribution        125  Project Keywords
115  Project Reporting Requirements       127  Project Report Tracking
116  Project Billing Information          128  Project Contact Information
117  Project Installment Schedule         129  Project Contact Maintenance
118  Project Bill to Address
119  Project Researcher Information       190  Project Delete
120  Project Limitation of Cost           191  Award Delete


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Menu M12 - SPR Project Inquiry Menu

```
M12 SPR Project Inquiry Menu                                      11/04/13 13:39
                                                                   FY 2014 CC 02
Screen: ___
                        Project Inquiry Screens

--- General Project and Award Data ---    ----- Accounting Data ------------
140 Awards for a Project                  150 Project Summary By Budget Pool
141 Project High Level Summary            151 Project Indirect Cost Assessed
142 Projects for a Researcher             152 Account Summary for a Project
143 Project Due/Over Report Tracking      153 Revenue for a Project
144 Parent Project Inquiry                154 Accounts for a Project
145 Project Browse by Keyword             155 User Defined Categories
146 Projects for a Sponsor                156 Project Summ by Target Budget
147 Awards for a Researcher               157 Project Summ by User Category
148 Awards for a Sponsor                  158 Project Summ by Acct/Budget Pool

                                          --- Departmental Planning Budgets --
                                          159 Dept Defined Profile Inquiry
                                          160 Proj Dept Defined Budget Pool
                                          161 Project Summ by Target Budget
                                          162 Project Summ by User Category
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Menu M13 - SPR Cost Sharing Menu

```
M13 SPR Cost Sharing Menu                                        11/04/13 13:41
                                                                  FY 2014 CC 02
Screen: ___

                 --------Cost Sharing Maintenance----------

                 130  Cost Sharing Period Maintenance
                 131  Cost Sharing Req. Account Maintenance
                 132  Cost Sharing Transaction Entry
                 133  Cost Sharing Req. Account Delete
                 134  Cost Sharing Period Delete

                 -------- Cost Sharing Inquiry------------

                 136  Cost Sharing All Period Summary
                 137  Cost Sharing Period Acct. Summary
                 138  Cost Sharing Transaction Detail
                 139  Cost Sharing Requirements by SL


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Menu S01 – SPR System Table Menu

```
S01 SPR System Table Menu                                        11/04/13 13:42
                                                                  FY 2014 CC 02
Screen: ___

                 * Processing Control Table Maintenance *

801  Indirect Cost Table                    815  Coordinating Board Code Table
802  Distribution Code Table                816  Letter of Credit Table
804  Federal Domestic Assistance Table
805  GL Subcode Descriptions                850  Person Information
806  SL Subcode Descriptions                860  Department Table Maintenance
807  Award Estimates by Department          899  Maintain Dictionary Values
808  Proposal Estimates by Department
809  Keyword Table Maintenance


                  * System Control Record Maintenance *

                          821 Control Record
                          882 Campus Code Change

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

# SPR Basic Concepts

Conducting research is an important part of the mission and core values of The Texas A&M University System. The Sponsored Research Module in FAMIS is designed to assist with the tracking and reporting of sponsored projects. The Proposal section handles the initiation of proposals, while the Projects section holds the data related to awarded projects.

The following includes some annotated excerpts from the A&M University System's policy and procedures manual which outline the basic concepts in conducting research activities. (Please see the policy in its entirety at:

https://www.tamus.edu/offices/policy/policies/

## Mission

The Texas A&M University System was established to provide educational opportunity and service to Texas through its universities, state agencies, and health science center (HSC). We strive for the highest quality undergraduate, graduate, and professional educational programs; outreach and community enhancement services that meet the needs of individuals and organizations, and **research and knowledge generation** that meet our creative needs and provides the foundation for economic development in Texas.

## Research Policy

The Chancellor shall approve procedures submitted by the CEO of each component for the implementation of **research projects** funded from Federal, State, commercial, gift, or specific donated funds.

**Initiation of Agreements**

It shall be the policy of the System to cooperate whenever possible, within the limits of its means and responsibilities, with individuals, government agencies, corporations or other outside parties in the solution of problems of mutual interest. The initiative for effecting such cooperative arrangements, including the establishment of grants-in-aid for the support of **research work**, may be assumed either by a component of the System or by an outside party.

## General

In accepting **sponsored agreements**, System components are obligated to fulfill the purposes, and to meet the requirements, of the sponsored agreement. Expenditures of funds or use of resources provided by the sponsor or cost shared by the System component are governed by the sponsored agreement and System policies and regulations.

# Types of Sponsored Agreements

**Sponsored agreements** are projects and activities that are supported (in whole or in part) with funds, materials, or other resources provided by sources outside the System. Sponsored agreements are included in the major functions of an institution as defined below:

(1) **Instruction** means the teaching and training activities of an institution whether offered on a credit or noncredit basis, and whether offered through regular academic departments or separate divisions, such as a summer school division or an extension division. This term does not include the training of individuals in research techniques (commonly referred to as research training) as described in 2.1(2)(a) Sponsored research.

(2) **Organized research** means all research and development activities of an institution that are separately budgeted and accounted for. It includes the following:

(a) Sponsored research means all research and development activities that are externally sponsored by federal and non-federal agencies and organizations. This term includes activities involving the training of individuals in research techniques (commonly called research training) where such activities utilize the same facilities as other research and development activities and where such activities are not included in the instruction function.

(b) University research means all research and development activities that are separately budgeted and accounted for by the institution under an internal application of institutional funds.

(3) **Other sponsored activities** mean sponsored programs and projects which involve the performance of work other than instruction and organized research. Examples are health service projects and community service programs.

Definitions of major types of **sponsored agreements** include the following:

(1) **Contracts** - an award by a sponsor to procure goods or services (including research) needed by the sponsor. Contracts awarded by federal agencies are usually subject to the *Federal Acquisition Regulation*.

(a) Cost Reimbursement Contract - a contract issued on the basis of an estimate of the cost of performing the work arrived at by negotiation between the sponsor and the contractor. The contract provides for payment to the contractor for costs actually incurred up to a ceiling amount equal to the total estimated cost stated in the contract. The contractor is normally excused from further performance after the contractor's costs reach the ceiling, unless the sponsor increases the ceiling.

(b) Cost-Plus-A-Fee Contract - a cost-reimbursement contract under which the contractor is paid a fee in addition to costs incurred. The fee may be set as a fixed percentage of the total estimated cost (a cost-plus-fixed-fee contract), or it may vary depending upon specified parameters such as cost, performance or schedule incentives set at the time the contract is negotiated (a cost-plus-incentive-fee contract). Cost-plus-a-fee contracts are not normally used for sponsored agreements of the System.

(c) Fixed Price Contract - a contract in which the contractor agrees to deliver or to perform the contract work within the period specified at a fixed price agreed upon in advance and payable regardless of the actual costs.

(d) Fixed Price Contract With Price Revision - a fixed price contract that contains a provision for negotiating the price, sometimes either downward or upward within preset limits, after the work has been completed.

(2) **Grants** - an award of financial assistance to accomplish a public purpose. Grants may be in the form of cash or property. The cash or property is designated by the grantor to be used for a specific educational, research, or extension project or activity, thus serving a specific interest or objective of the grantor. Grants awarded by federal agencies are subject to Office of Management and Budget (OMB) Circular A-110 and regulations established by the awarding agencies.

(a) Project Grant - the most common form of grant. It provides funding for a specific project or program with a defined scope of work. Most project grants are for organized research.

(b) Consortium Grant - a grant made to one institution in support of a project in which the program is carried out through a cooperative arrangement between or among the grantee institution and one or more participating institutions.

(c) Demonstration Grant - a grant, generally of limited duration, made to establish or demonstrate the feasibility of a theory or approach.

(d) Formula Grant - a type of grant awarded on the basis of some formula for distribution prescribed by legislation or executive directive. Examples are formula grants to agricultural experiment stations.

(e) Grant-In-Aid - another name for a project grant or formula grant.

(f) Step-Funded Grant - a project grant, usually for a period of three years, with the initial grant providing 100% of the funds for the first year, 2/3 of the funds for the second year and 1/3 for the third year. A year later, if the project is to be continued, the grant provides 1/3 of the funds for the second year, 1/3 for the third year and 1/3 for a fourth year.

(3) **Cooperative Agreement** - an award of financial assistance, similar to a grant, except that "substantial involvement" is anticipated between the awarding agency and the recipient during performance of the project or activity. "Substantial involvement" means that the recipient can expect programmatic collaboration or participation from the awarding party in the management of the award. Cooperative agreements awarded by federal agencies are usually subject to the same administrative requirements as grants.

# Preparation and Submission of Proposals/Agreements

**Sponsored agreements** will be conducted in accordance with the terms of a written agreement between the System component involved and the sponsor. The agreement will include, but is not limited to, the following:

(1) statement of work, including specific responsibility of each party;

(2) name or position of faculty or staff member directly responsible for the program;

(3) the amount, terms of payment, and type of costs for which the funds may be expended;

(4) F&A cost considerations;

(5) provisions for progress and final reports; and

(6) ownership of research results, patents, equipment, publications, and copyrights. (See System Regulation 17.02.01.)

# Sponsored Agreements Administered by the Texas A&M Research Foundation

The Texas A&M Research Foundation (Research Foundation) is an independent, nonprofit organization affiliated with and representing the System and its components in **sponsored arrangements** with research sponsors from industry, government, foundations, private business organizations, and other nonprofit organizations.

# Allowability and Documentation of Costs on Federally Sponsored Agreements

Regardless of whether they are treated as direct costs or F&A costs, the allowability of costs on **sponsored agreements** with federal agencies is governed by the cost accounting principles prescribed by OMB Circular A-21, *Cost Principles for Educational Institutions*. These cost principles are also used in determining the cost of work performed by educational institutions under subgrants, cost-reimbursement subcontracts, and other awards under federally sponsored agreements. Further, OMB Circular A-21 cost principles are used as a guide in the pricing of fixed-price or lump sum contracts and sub-contracts performed by educational institutions where estimated costs are used in determining the appropriate price.

All costs charged to **sponsored agreements** must be adequately documented. Charges for salaries and wages must be documented by after-the-fact certifications (or individual time sheets for hourly staff and some student employees) of time or effort devoted to each sponsored agreement by each employee. The documentation of other costs, such as supplies and travel should be appropriate to the specific type of expense involved (e.g., invoices, airline and hotel receipts, etc.).

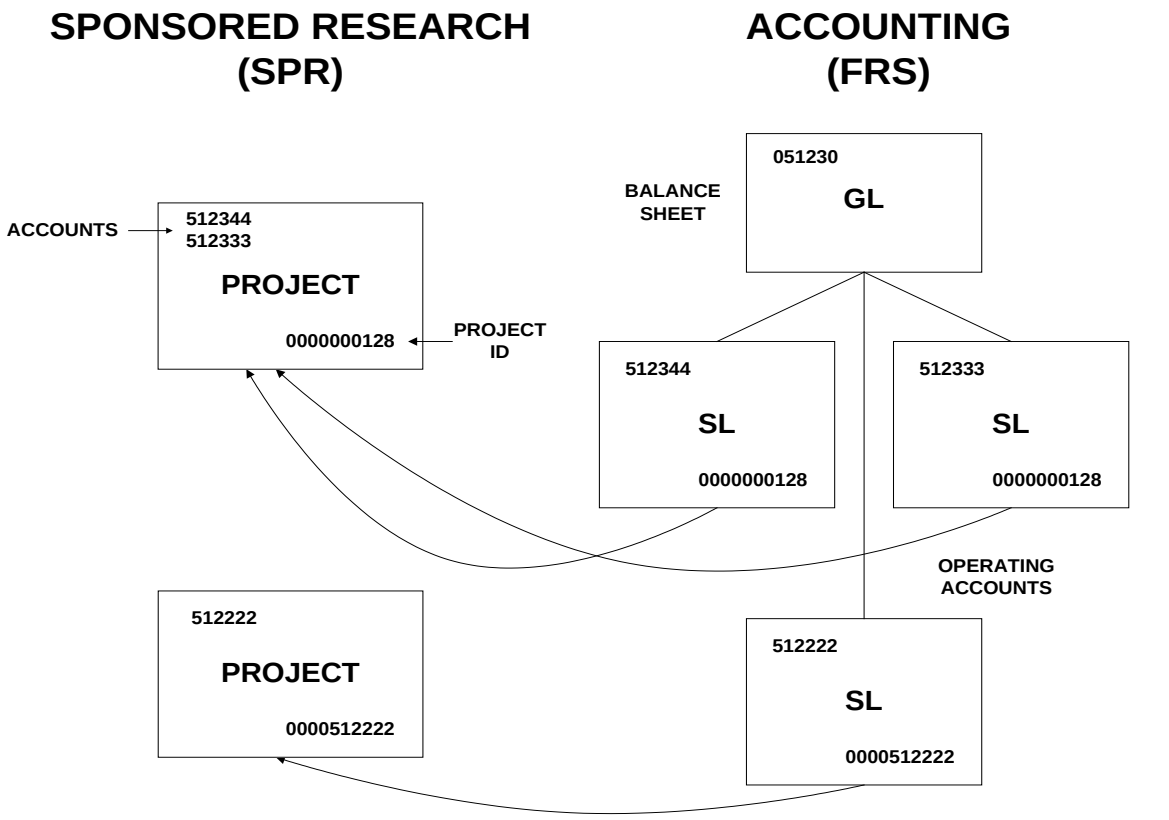
# Consistent Treatment of Direct Costs and Facilities and Administrative Costs of Sponsored Agreements

**Direct Costs**

Those costs that can be identified specifically with a particular **sponsored project**, an instructional activity, or any other institutional activity or that can be directly assigned to such activity relatively easily with a high degree of accuracy. Examples of costs charged directly to a sponsored agreement are the compensation of employees for performance of work on the project, the costs of materials expended on the project, and other items of expense incurred for the project.

**F&A Costs**

Those costs that are incurred for common or joint objectives and therefore cannot be identified readily and specifically with a particular sponsored project, an instructional activity or any other institutional activity. Examples of F&A costs, which were formerly referred to as indirect costs, are general administrative expenses, departmental administration, sponsored projects administration, equipment and building use allowances, and physical plant operation and maintenance. These costs represent a real expense to the institution in the performance of sponsored agreements.


SPONSORED RESEARCH (SPR)
ACCOUNTING (FRS)
051230
GL
BALANCE SHEET
ACCOUNTS
512344
512333
PROJECT
0000000128
PROJECT ID
512344
SL
0000000128
512333
SL
0000000128
OPERATING ACCOUNTS
512222
PROJECT
0000512222
512222
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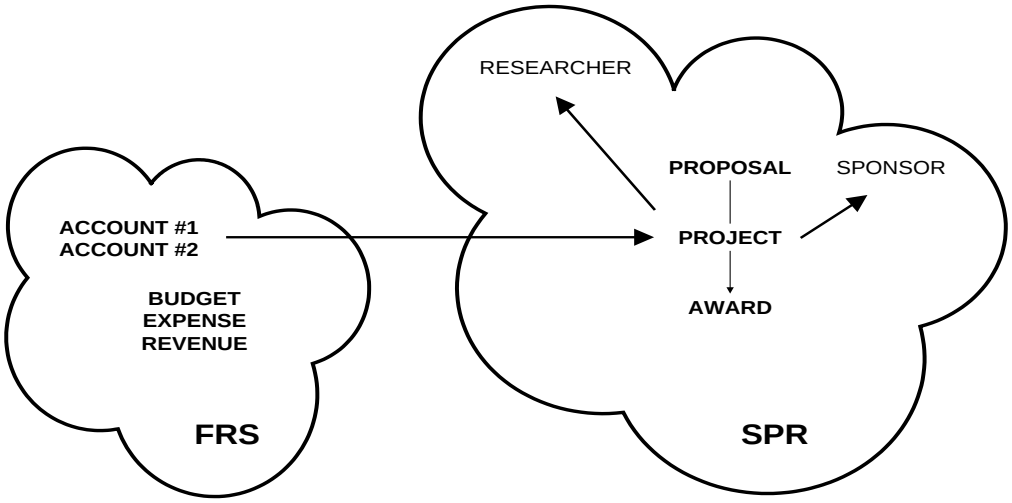
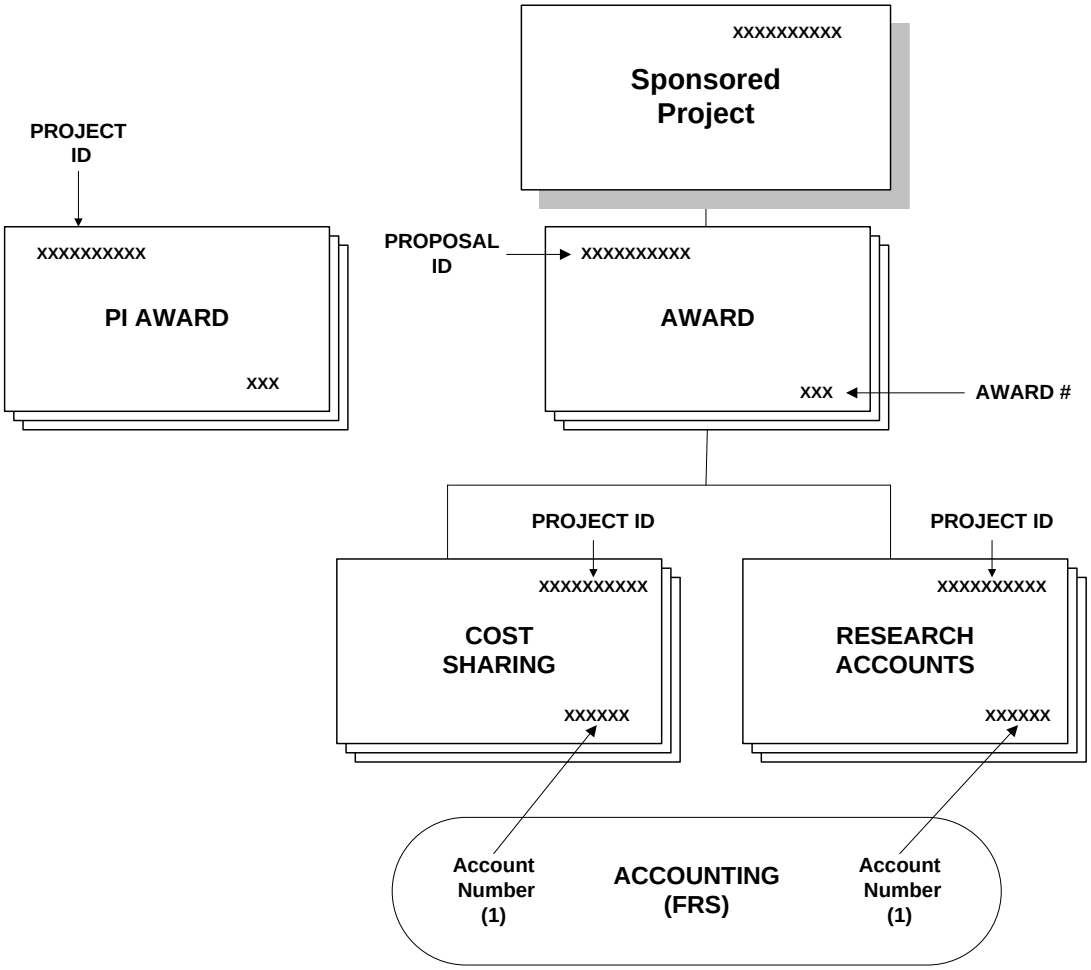
# RELATIONSHIP OF SPR & FRS




T:/FA/DOC/WRKNPRCS/SPR/PROJECTS/SPRCONCEPT

# SPONSORED RESEARCH PROJECT VIEW

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# Section II
# Sponsor and Researcher Information

# Add/Modify Sponsor Information

Inquiry and updates to FAMIS sponsor information are handled on Screen 4. Sponsor numbers are created to identify those agencies and institutions that support research within the TAMU System. The 7-digit number, associated with each sponsor, is assigned by the user according to guidelines set by his/her System part.

A three-digit field for entering the Texas State Agency Code (***Tx State Agency Cd***) has been added to indicate that a sponsor is a Texas State Agency. (Examples: use 711 for TAMU and 710 for TAMUS.) FAMIS will not allow you to enter the Sponsor Code without an Agency Code. If there is no State Agency Code, you may use "999."

A Maestro identification number is required in the ***Maestro*** field. Use ***PF2*** to select the sponsor's ID from the search screen; if none is available you will need to request a new Maestro sponsor number from someone authorized at your entity.

## Request a new Maestro Sponsor Number

1. Download and complete the form: http://maestro.tamus.edu/tiki-download_wiki_attachment.php?attId=26&page=HomePage

2. Email the completed form to maestrosponsor@tamus.edu or FAX it to (979) 458-7619. TEES Research Services (TRS) will provide the Maestro Sponsor ID. This central maintenance is required to avoid duplicates and maintain standard names in Maestro.

3. Create the sponsor in FAMIS, entering the Maestro Sponsor ID received from TRS in the ***Maestro*** field on Screen 4.

> The Sponsor Table (file) is a shared file among FAMIS users. The changes you make for a sponsor affect all TAMUS Parts using the SPR module.

**Screen 4 - Sponsor Maintenance**

```
  004 Sponsor Maintenance                                          09/21/09 14:14
                                                                    FY 2009 CC 99
  Screen: ___ Sponsor: 0002515

     Sponsor Name: ALAMO AREA COUNCIL OF GOVERNMENTS_______
Sponsor Long Name: ALAMO AREA COUNCIL OF GOVERNMENTS_____________________________
     Sponsor Type: LG          State Code: TX          Tx State Agency Cd: 999
 Classification Levels: ______ ______ ______ ______ ______ ______
  Fiscal-Year-End: 00  Maestro: 2448______ Alamo Area Council of Governments
     Restrictions: ____________________________________________________
                   ____________________________________________________
                                                  Added by: RxxxxxP  01/05/2006
                              * ----- Contacts ----- *
 Sel  Type      Name                        Title                  Phone     Ext.
  _    PP     CARLA CARSON                ADM. SERVICES DIRECT  210-362-5295

      Press PF9 to add/modify/view additional restrictions text.

                                 **  End of list  **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                     Info
```

**PF9 Info (Displays any additional lines of Restrictions text)**

```
  004 Sponsor Maintenance                                          07/09/09 09:25
                                                                    FY 2009 CC 02
  Screen: ___ Sponsor: 0004049

     Sponsor Name: TEXAS A&M UNIV.-OFFICE OF INT'L PROGRAMS
Sponsor Long Name: TEXAS A&M UNIV.-OFFICE OF INT'L PROGRAMS____________________
     Sponsor Type: IN          State Code: TX          Tx State Agency Cd: 711
 Classification Levels: ______  ______  ______  ______  ______  ______

     Restrictions: ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
                   ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                    Info
```

# Basic Steps

## Add Sponsors

- Type a zero (0) in the ***Sponsor*** field and press <ENTER>.
- Type a ***Sponsor Name*** and ***Sponsor Type*** in the available fields.
- Enter additional data in the fields provided, as desired.
- Press <ENTER> to record the sponsor information.

## Modify Sponsors

- Type the sponsor's number in the ***Sponsor*** field or type an asterisk (*) to select the desired sponsor from the displayed list in the pop-up window and press <ENTER>.
- Make modifications as needed and press <ENTER> to record the information.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Sponsor:** ? Help 7 digits
Enter a FAMIS sponsor identification number.

## *Screen Information*

◆ **Sponsor Name:** PF2 Help 40 characters
Identify the short name or abbreviation of the sponsor.

**Sponsor Long Name:** PF2 Help 60 characters
Type the full name of the sponsor giving awards for research. This should be the same as the previous field unless the sponsor name is too lengthy for the ***Sponsor Name*** field.

**Sponsor Type:** ? Help 2 characters
Identify the type of sponsor funding the project.

**State Code:** ? Help 2 characters
Include the State mail code. Example: Texas = TX.

◆ **Tx State Agency Cd:** 3 digits
Enter the Texas State Agency code for a sponsor that is a Texas State Agency. (Examples: 711 for TAMU and 710 for TAMUS.) **If there is none, you may use "999."**

**Classification Levels:** 6 characters each, 6 levels
Indicate hierarchical classification levels available to classify sponsors.

**Fiscal-Year-End:** PF2 Help 2 digits
Signify the last month of the fiscal year for the selected sponsor.

◆ **Maestro:** 10 digits
Enter the identification code for the Maestro sponsor. **If none is available, you will need to follow the steps for creating a new Maestro sponsor.**

**Restrictions:** 100 characters
Identify any restrictions placed by the specified sponsor.

**Added by:** 15 characters/digits
Displays the FAMIS User ID of the person who added the sponsor, and the date the sponsor was added.

**Sel:** 1 character
Type an "X" and press <ENTER> to select and view additional contact information.

**Type:** 1 character
Identifies the function of the contact.

**Name:** 25 characters
Displays the full name of the contact.

**Title:** 20 character
Indicates the title/function of the proposal contact.

**Phone:** 10 digits
Displays the area code and phone number of the proposal contact.

**Ext:** 4 digits
Identifies the phone extension number of the specified contact.

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for an explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen according to information shown on Screen 821. |
| **PF9**<br>**Info** | **Additional Restriction Information**<br>Used to add/modify additional sponsor restriction information. **This PF key can be used to toggle additional Restrictions information display on and off, if available.** |

# Enter Sponsor Contact Information

Sponsor contact information may be accessed and updated on Screen 5. The fields shown represent attribute information about the sponsor's contact person.

**Since the original sponsor is not contacted at this level, this screen isn't often used.**

**Screen 5 - Sponsor Contact Maintenance**

```
005 Sponsor Contact Maintenance                                  02/12/09 16:23
                                                                  FY 2009 CC 02
Screen: ___  Sponsor: 0004042  Contact Type: A_
                      BRAYER CROPSCIENCE



Contact Number: 1                          Delete this Contact: _ (Y/N)
          Name: MR. GREG GARRISON________
         Title: BRAYER CROPSCIENCE_______
       Address: 3333 REYNO WAY_______________
                ______________________________
                ______________________________
          City: SPRING BRANCH_______ State: TX Zip: 78070____
         Phone: 830-888-4444  Ext: ____    Country: US_
           Fax: _____________


         >>> Press PF10 for a list of Sponsor Contacts <<<

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                          List
```

## Basic Steps

### Add or Modify Sponsor Contacts

- Type a sponsor identification number in the ***Sponsor*** field and ***Contact Type*** field and press <ENTER>.
- Enter the name of the contact in the ***Name*** field.
- Enter additional data in the available fields, as desired.
- Press <ENTER> to record the sponsor contact information.

## Contact Maintenance Process

### Contact Search

Press ***PF10*** to display a complete list of contacts for a specified sponsor. Typing an “X” next to the appropriate contact and pressing <ENTER> will take you back to Screen 5 where the selected contact information will be displayed. Press <ENTER> to return to Screen 5 without selecting a contact.

```
+-------------------------------------------------------------+
|                                                             |
|   Screen: ___        ** Contact List **                     |
|                                                             |
| Sel Type Name                      Title                    |
| --- ---- ------------------------- ------------------------  |
|  _   A   MR. GREG GARRISON         BRAYER CROPSCIENCE       |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                  ** 1 Contacts displayed **                 |
+-------------------------------------------------------------+
```

## Contact Type

The contact type is used to group sponsor contacts by function. Only one contact is allowed per contact type. For example, if there are two administrative position contacts, only one would be listed under contact type "A." The second contact should be "A2"; the next should be "A3," etc. The same process applies to all contact types.

Typing a question mark (?) in the ***Contact Type*** field and pressing <ENTER> will access a pop-up window with a list of valid contact types. Enter an "X" next to the desired contact type and press <ENTER> to select it and return to Screen 5. Press ***PF4*** if you wish to return to Screen 5 without selecting a contact type.

Sample contact types include the following values:

```
+-----------------------------------------------+
|  M  VALUES MEANING                            |
|  -  -----  --------------------------------- |
|     A      ADMINISTRATIVE                     |
|     A2     ADMINISTRATIVE - 2                 |
|     A3     ADMINISTRATIVE - 3                 |
|     BD     BUDGET                             |
|     BS     BUSINESS                           |
|     F      FINANCIAL                          |
|     IP     INTELLECTUAL PROPERTY              |
|     P      PROPERTY/INVENTORY                 |
+-----------------------------------------------+
```

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Sponsor:** ? Help 7 digits
Enter a FAMIS sponsor identification number.

◆ **Contact Type:** ? Help 2 characters
Identify the function of the contact. Examples:

| | | |
|---|---|---|
| A | = | Administrative |
| A2 | = | Administrative - 2 |
| A3 | = | Administrative - 3 |
| BD | = | Budget |
| BS | = | Business |
| F | = | Financial |

## ***Screen Information***

**Contact Number:** 3 digits
Displays the system assigned number given to each contact.

**Delete this Contact:** 1 character
Type "Y" to delete the contact from the sponsor information.

◆ **Name:** 25 characters
Identify the name of the contact person.

**Title:** 25 characters.
Indicate the title/function of the sponsor contact.

**Address:** 30 characters (3 lines)
Include the street address of the contact where correspondence should be mailed.

**City:** 20 characters
Type the name of city for the address.

**State:** ? Help 2 characters
Identify the state code for the address.

**Zip:** 9 digits
Enter the ZIP code for the address.

**Phone:** 12 digits
Include the contact's phone number, including area code.

**Ext:** 4 digits
If needed, enter the phone extension number.

**Country:** ? Help 3 characters
Type the country code.

**FAX:** 12 digits
Provide the contact's FAX number, if available.

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for an explanation of the standard PF keys. |
| **PF5** | **Next** |
| **Next** | Goes to the next screen that follows according to information shown on Screen 821. |
| **PF10** | **Contact List** |
| **List** | Displays a complete list of contacts for a specified sponsor. Type an "X" next to the desired contact and press <ENTER> to view/modify information on Screen 5. Press <ENTER> to return to Screen 5 without selecting a contact. |

# Enter Sponsor Aliases

An alias is a name for a specified sponsor, other than the current record name. Aliases can help locate the sponsor through a name search. Each sponsor may have several aliases. Screen 7 is used to maintain aliases for a sponsor.

> Each TAMUS Member has designated users who have the authority to update the ***Alias*** field for a sponsor.

**Screen 7 - Sponsor Alias Maintenance**

```
 007 Sponsor Alias Maintenance                                  02/12/09 16:31
                                                                 FY 2009 CC 02
 Screen: ___  Sponsor: 0004054  TX COMMISSION ON ENVIRONMENTAL QUALITY

                                                 Drop
Alias: TCEQ_____________________________________  _
       TEXAS COMMISSION ON ENVIRONMENTAL QUALIT  _
       TX COMMISSION OF ENVIRONMENTAL QUALITY__  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _
       _________________________________________  _

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

### Add a Sponsor Alias

- Type a sponsor identification number in the ***Sponsor*** field.
- Press <ENTER> to display any existing alias information.
- Type the name of the sponsor alias and press <ENTER> to record.

### Drop a Sponsor Alias

- Type "Y" in the ***Drop*** field next to the desired alias. No sponsor data is lost when an alias is dropped.
- Press <ENTER> to confirm the drop.

> When a sponsor is deleted (using Screen 192), FAMIS will automatically **remove *all* aliases** that have been created for the sponsor.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Sponsor:** ? Help 7 digits
Enter a FAMIS sponsor identification number.

## *Screen Information*

◆ **Alias:** 40 characters
Enter the alias name for the sponsor, other than the current record name.

**Drop:** 1 character
Type "Y" to drop the sponsor alias from the system.

## *Additional Functions*

**PF KEYS** See the Appendix for an explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Enter Sponsor Classification Levels

Entry and update of sponsor classification levels is accomplished by using Screen 8. This is used primarily for Federal sponsors to provide a hierarchical classification.

For example in the screen displayed below, the "Forth Worth division of the Army Corps of Engineers" could be identified by the following hierarchy:

Level 1 - DOD
Level 2 - Army
Level 3 - Corps
Level 4 - FW

Information entered on this screen may be viewed using **Screen 4** or **Screen 9**.

**Screen 8 - Sponsor Levels Maintenance**

```
008 Sponsor Levels Maintenance                                  02/22/05 14:14
                                                                 FY 2005 CC AB
Screen: ___  Sponsor: 0000008  ARMY CORPS OF ENG. - FORT WORTH TEXAS


             Level 1: DOD___

             Level 2: ARMY__

             Level 3: CORPS_

             Level 4: FW____

             Level 5: ______

             Level 6: ______


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a sponsor identification number in the ***Sponsor*** field and press <ENTER> to display the existing sponsor information.
- Type up to 6 levels of organization for the sponsor and press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Sponsor:** ? Help 7 digits
Enter a FAMIS sponsor identification number.

## ***Screen Information***

| | |
|---|---|
| **Level 1, 2, 3, 4, 5,6:** | 6 characters each, 6 levels<br>Identify the user-defined hierarchical classification of a selected sponsor. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for an explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Sponsors by Classification Level

You may display all sponsors for a level or combination of levels and sponsor type using Screen 9. If you enter only data in the ***Sponsor Type*** field, all levels for that type will be displayed.

**Screen 9 - Sponsor Levels Inquiry**

```
009 Sponsor Levels Inquiry                                        02/12/09 16:43
                                                                   FY 2009 CC 99
Screen: ___  Sponsor Type: F_
                   Levels: AID___  ______  ______  ______  ______  ______

 ID         Sponsor Name           ---------------- Levels ----------------
0xxxxx5  USAID                     AID
0xxxxx2  AID-BOLIVA                AID    BOLIVI
0xxxxx2  AID-IDCA                  AID    IDCA
0xxxxx3  AID-IDCA-REDSO-WCA-OP     AID    IDCA   REDSO



                      **** End of Sponsor List ****
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a ***Sponsor Type***, and ***Levels*** if desired, and press <ENTER> to display a list of sponsors and their assigned levels.
- Press <ENTER> to page through the listing.

## Sponsor Levels Inquiry Process

### Positioning the Display

The sponsor levels listing may be positioned by entering one or more valid levels in the fields provided. Type in the desired levels in the ***Levels*** fields to view a list of sponsors that have been assigned to the specified levels, or leave blank to view all sponsors for the sponsor type entered in the ***Sponsor Type*** field.

### Sponsor Types

| | | |
|---|---|---|
| F | = | FEDERAL |
| IN | = | INSTITUTIONAL (TAMUS SPONSORED) |
| LA | = | COUNTY AGENCIES |
| LD | = | DISTRICTS, AUTHORITIES, COMMISSION |
| LG | = | CITY GOVERNMENTS |
| NC | = | PRIVATE NON-PROF FED FUND RES ORG |
| NF | = | PRIVATE NON-PROF FOUNDATION |
| NR | = | PRIVATE NON-PROF RESEARCH ORG. |

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Sponsor Type:** ? Help 2 characters
Identify the type of sponsor funding the project.

**Levels:** 6 characters each, 6 levels
Indicate the hierarchical classification levels to narrow the display of sponsors.

## *Screen Information*

**ID:** 7 digits
Shows the FAMIS sponsor identification number.

**Sponsor Name:** 25 characters
Indicates the name of the sponsor.

**Levels:** 6 characters
Identifies the user-defined hierarchical classification level of a selected sponsor.

## *Additional Functions*

**PF KEYS** See the Appendix for an explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Delete a Sponsor

Sponsors may be deleted from the system using Screen 192. However, **sponsors may only be deleted if they do not have any existing projects associated with them**.

If there are existing projects associated with the sponsor, the message shown on the screen below will appear at the top of the window.

**Screen 192 - Sponsor Delete**

```
S6304 12 Project(s) exist on Campus 17 - Cannot Delete Sponsor
 192 Sponsor Delete                                          02/13/09 08:38
                                                              FY 2009 CC 02
 Screen: ___ Sponsor: 0001682


             Enter 'Y' to Delete: _


        Sponsor: RURAL COASTAL BEND PRIVATE INDUSTRY COUNCIL
     Short Name: RURAL COASTAL BEND PRIVATE INDUSTRY CNCL
   Sponsor Type: PP          State Code: TX
```

## Basic Steps

- Type a sponsor identification number in the ***Sponsor*** field and press <ENTER> to display existing sponsor information.
- If there are no existing projects associated with the sponsor, you may type "Y" in the ***Delete*** field and press <ENTER> to remove the sponsor from the system.
- Type "Y" in the pop-up window to confirm deletion of the specified sponsor.

## Sponsor Deletion Process

### Delete a Sponsor

If there are no existing projects associated with the specified sponsor, you may type "Y" in the ***Delete*** field on Screen 192 to initiate removal of the sponsor from the system. Type a "Y" in the confirmation window to delete the specified sponsor.

```
+---------------------------------------------+
|                                             |
|   Sponsor: 0001682 RURAL COASTAL BEND PRIV  |
|      NAME: RURAL COASTAL BEND PRIVATE INDU. |
|                                             |
|        Type 'Y' To Confirm Deletion         |
|        of Sponsor 0001682 (Y/N): Y          |
|                                             |
+---------------------------------------------+
```

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Sponsor:** ? Help 7 digits
Enter a sponsor identification number.

◆ **Enter 'Y' to Delete:** 1 character
Type "Y" to delete the sponsor.

## *Screen Information*

**Sponsor:** PF2 Help 60 characters
Displays the full name of the sponsor to be deleted.

**Short Name:** PF2 Help 40 characters
Identifies a short name or abbreviation of the sponsor to be deleted.

**Sponsor Type:** 2 characters
Indicates the type of sponsor.

**State Code:** 2 characters
Shows the state mail code.

## *Additional Functions*

**PF KEYS** See the Appendix for an explanation of the standard PF keys.

# Add/Modify Researcher Information

Screen 6 allows update and informational inquiry about a researcher. The researcher's UIN (Universal Identification Number) is currently used as the researcher identification number.

**The person file for research must be set up on FRS Screen 850 before data will be displayed on this screen.**

**Screen 6 - Researcher Maintenance**

```
006 Researcher Maintenance                                        02/13/09 08:44
                                                                   FY 2009 CC 99
Screen: ___  Researcher: 6uuuuuuu3 ABARR, ANTONE A

        PI/Researcher: _
Date Doctoral Received: __________        Member Graduate Council: _
       Assistant Name: ____________________      Assistant Phone: ____________
    Areas of Interest: _____  _____  _____  _____  _____
                       _____  _____  _____  _____  _____
Special Instructions: ________________________________________
                      ________________________________________
                      ________________________________________

      UIN: 6uu-uu-uuuu     Address:
   Gender: M
Dept/SDept: PHYS
Date Hired: 01/17/06           City:                  St:     Zip:
Title Code: 7300             Phone: 979-444-7777             FAX:
Adloc Part: 02            Mail Code: C4242
      Acct: 133506
    Suffix:          E-Mail: abarraa@phys.tamu.edu
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a researcher identification number in the ***Researcher*** field. If the number is not known, you may type an asterisk (*) in this field to view a list of researchers, or type part or all of the researcher's last name to view matching researchers.
- Press <ENTER> to display existing researcher information.
- Type additional information or make modifications, as desired, and press <ENTER> to record the researcher information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Researcher:** * Help 9 digits
Enter a researcher's UIN number.

### *Screen Information*

**PI/Researcher:** 1 character
Type "Y" in this field if the person is a PI/Researcher.

**Date Doctoral Received:** 10 digits
Enter the date the researcher received his/her doctoral degree.

**Member Graduate Council:** PF2 Help 1 character
Type "Y" if the researcher is a member of the graduate council.

**Assistant Name:** PF2 Help 20 characters
Identify the name of the researcher's assistant, if any.

**Assistant Phone:** 10 digits
Provide the phone number of the researcher's assistant, if applicable.

**Areas of Interest:** 5 characters each
Include any or the researcher's interests/specialties. Note: this is not currently defined for system.

**Special Instructions:** PF2 Help 40 characters, 3 lines
Indicate any special instructions/items of interest for the selected researcher.

**UIN:** 9 digits
Displays the researcher's Universal Identification Number.

**Address:** 90 characters
Provides the street address of the selected researcher, as entered on Screen 850.

**Gender:** 1 character
Indicates whether the specified researcher is a male (M) or female (F).

**Dept/SDept:** 5 characters
Identifies the department or subdepartment where the researcher is employed.

**Date Hired:** 6 digits
Shows the researcher's hire date.

**City:** 15 characters
Displays the city where the researcher resides.

**St:** PF2 Help 2 characters
Indicates the mail code of the state where the researcher resides.

**Zip:** 9 digits
Identifies the ZIP code for the researcher's mailing address.

**Title Code:** PF2 Help 4 digits
Identifies the position held by the researcher within the TAMU system.

**Phone:** 10 digits
Provides the researcher's phone number.

**FAX:** 10 digits
Shows the researcher's FAX number.

**Adloc Part:** PF2 Help 2 digits
As defined by BPP.

**Mail Code:** PF2 Help 5 digits
Identifies the researcher's campus mail stop code.

**Adloc Acct:** 6 digits
Shows the adloc account, as defined by BPP.

**Suffix:** 1 character
Displays the suffix assigned to the adloc account, as defined by BPP.

**E-Mail:** 30 characters
Identifies the researcher's email address, if available.

## ***Additional Functions***

**PF KEYS** See Appendix for explanation of standard PF keys.

**PF5** Next
**Next** Goes to the next screen that follows according to information on Screen 821.

# Section III
# Project Proposal Transfers

# SPR Project Proposal Transfer Menu

You can find the screens that are needed to transfer project and award information to and from on-line proposals by viewing Menu M10. This menu lists the available project/proposal transfer screens for the SPR application functions.

These transfer screens eliminate the extra work that would otherwise be required when an award is made from a proposal established in FAMIS.

There are two transfers from a proposal to an award:

1. creates both the project and the first award
2. creates an award to an existing project

In addition, you have the ability to create a proposal from an existing project or award. Again, this can eliminate a lot of entry work when you put out a proposal for a second award.

**Menu M10 - SPR Project Proposal Transfer Menu**

```
M10 SPR Project Proposal Transfer Menu                          02/13/09 08:47
                                                                 FY 2009 CC 99
Screen: ___

                        Transfer Screens

                    101  Project & Award Create from a Proposal
                    102  Award Only Create from a Proposal
                    103  Proposal Create from Project / Award









Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

# Create Project/Award from a Proposal

FAMIS makes it possible for you to create a new project and its first award from an existing on-line proposal. You may use Screen 101 to give a system assigned project number or you may assign your own number to the project. This screen will also provide information on the type of project you are creating.

**Before you can create a project or an award from a proposal, the proposal status must be set to "A" or "F" on Screen 11.**

This screen is only used to **create new projects and their first award**.
If a project already exists for a proposal, or an award has already been entered on the system, you should use **Screen 111** to work with the existing project.

**Screen 101 - Project/Award Create from Proposal**

```
  101 Project/Award Create from Proposal                          02/13/09 09:00
                                                                   FY 2009 CC 99
  Screen: ___ Proposal: 0900084 Version: ___  WESTLAND CARDIOVASCULAR DEVELOPM

   System Assigned Number: Y_    User Assigned Number: __________

Copy Proposal Researchers: Y_  Copy Proposal Contacts: Y_

  Project Instrument Type: G_     Instrument Sub-type: CASH
     Project Funding Type: F

 Sponsor Awd Nbr: ________________________________________ Competitive Seg: _

               Award Type: I                    Amount: _______________
               Begin Date: 12/01/2008        End Date: 11/30/2009

--------------------------------------------------------------------------------
    To start the add of new project, perform one of the following steps:
1) enter 'Y' at 'System Assigned Number' for system to assign project number
2) enter ten-digit number at 'User Assigned Number' to assign project number

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a proposal number in the ***Proposal*** field.
- Type a version number in the ***Version*** field, if necessary, and press <ENTER> to display existing proposal information.
- In the fields available, indicate whether or not you would like FAMIS to assign the project number, if you would like to copy the researcher/contacts from the proposal, and enter the project instrument and funding types.
- Enter the type of award, amount of the award, as well as its beginning and ending dates in the fields provided, and press <ENTER> to record the detailed project information.

# Project/Award Creation Process

**Create New Projects**

To create new projects from an existing proposal, you must first:

- Enter "Y" in the ***System Assigned Number*** field. This will prompt the system to assign a project number.
  **OR**
- Enter a 10-digit number in the ***User Assigned Number*** field to define your own project number.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Proposal:** * Help 7 digits
Specify the proposal from which an award and project will be created.

**Version:** 3 characters/digits
Identify the specific version of the proposal from which the award and project will be created.

***Screen Information***

**System Assigned Number:** 1 character
Type "Y" to have FAMIS automatically assign a project number.

**User Assigned Number:** ? Help 10 digits
Enter the project identification number to be created from the proposal.

◆ **Copy Proposal Researchers:** 1 character
Type "Y" to copy researchers from the proposal to the project.

◆ **Copy Proposal Contacts:** 1 character
Enter "Y" to copy contacts from the proposal to the project.

◆ **Project Instrument Type:** ? Help 1 character
Indicate the type of legal instrument, which initiated the project.

◆ **Instrument Sub-type:** ? Help 4 characters
Indicate a sub category of the type of legal instrument, which initiated the project.

◆ **Project Funding Type:** ? Help 1 character
Signify the manner in which the project is funded.

**Sponsor Awd Number:** PF2 Help 40 digits
Identify the award number, as assigned by the sponsor.

**Competitive Seg:** 1 character
Indicate whether or not ("Y" or "N") to separate years within a competitive segment.

◆ **Award Type:** **? Help** 1 character
Provide the action taken or the reason that the award is being added.

**Amount:** **PF2 Help** 14 digits
Include the total dollar amount of the award.

◆ **Begin Date:** 8 digits
Identify the date the award will begin for the project.

◆ **End Date:** **PF2 Help** 8 digits
Include the date the award will end for the project.

## ***Additional Functions***

**PF KEYS** See the Appendix for an explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Create Award from a Proposal

You may tie a new award to an existing project from an existing proposal using Screen 102. The project must have already been created in order to use this screen. If you do not already have a project number, use Screen 101 instead.

**You can only create one project from a proposal.**

**Screen 102 - Award Create from Proposal**

```
102 Award Create from Proposal                                  02/13/09 09:08
                                                                 FY 2009 CC 99
Screen: ___ Proposal: 0100051 Version: ___  ADVANCED FUEL INJECTOR OPTIMIZATI

  Existing Project Number: __________

   Copy Proposal Contacts: Y     (Note: writes over existing contacts)
Copy Proposal Researchers: Y

               Award Type: I
             Award Amount: 100000.00_____
         Award Begin Date: 10/01/2007  End Date: 09/30/2008









Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Enter an original proposal number in the ***Proposal*** field. **Note that you can't use a proposal that has already been tied to an award.**
- Type a version number in the ***Version*** field, if necessary, and press <ENTER> to display any existing information.
- Type the ***Existing Project Number*** of the project to which you would like to tie the award.
- Indicate whether or not you would like to copy the contacts/researchers from the proposal. **This writes over existing contacts.**
- Include the ***Award Type***, ***Award Amount***, as well as the ***Award Begin Date*** and ***End Date*** for the award and press <ENTER> to record the information.

## Award Creation Process

### Link Projects to the Proposal

Type a question mark (?) in the ***Existing Project Number*** field and press <ENTER> to view a list of existing projects and project information, sorted in alphabetical order by Project Title. Type an "X" in the selection field next to the desired project and press <ENTER> to select the project and return to Screen 102. Press ***PF4*** to return to Screen 102 without selecting a project.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Proposal:** * Help 7 digits
Enter the proposal number from which the award will be created.

**Version:** 3 characters
Identify the specific version of the proposal from which the award will be created.

## *Screen Information*

◆ **Existing Project Number:** ? Help 10 digits
Enter project number to be linked to the award.

◆ **Copy Proposal Contacts:** 1 character
Type "Y" to copy contacts from the proposal to the project.

**Writes over existing contacts.**

**Copy Proposal Researchers:** 1 character
Type "Y" to copy researchers from the proposal to the project.

◆ **Award Type:** ? Help 1 character
Indicate the action taken to or the reason that the award is being added.

**Award Amount:** PF2 Help 14 digits
Include the total dollar amount of the award.

◆ **Award Begin Date:** 8 digits
Identify date the award will begin for the project.

◆ **End Date:** PF2 Help 8 digits
Enter the date the award will end for the project.

## *Additional Functions*

**PF KEYS** See the Appendix for an explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Create Proposal from Project/Award

Use Screen 103 when you want to create a new proposal from an existing project and award.

**Screen 103 - Proposal Create from Project/Award**

```
103 Proposal Create from Project/Award                          02/13/09 09:16
                                                                 FY 2009 CC 99
Screen: ___ Project: 4833410000 Award: 001

     New Proposal Number: 0099909     New Version Number: ___

   Copy Project Contacts: Y
Copy project Researchers: Y

           Proposal Type: S                  RFP Nbr: ____________________
      Proposal Dept/SDept: _____ _____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type an original project number in the ***Project*** field and award number in the ***Award*** field and press <ENTER> to display existing information.
- Type the ***New Proposal Number***, and ***New Version Number*** in the fields available.
- Indicate whether or not the project contacts/researchers should be copied to the proposal, and include the ***Proposal Type***.
- Enter additional data in the available fields, as desired, and press <ENTER> to create the new proposal.

## Proposal Creation Process

### Locate New Proposals

Type a question mark (?) in the ***New Proposal Number*** field and press <ENTER> to display a list of current proposals and version information with proposal numbers listed in alphabetical order by Proposal Title. Type an "X" next to the desired proposal and press <ENTER> to select the proposal and return to Screen 103. Press ***PF4*** if you wish to return to Screen 103 without selecting a proposal.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Indicate the project number from which the new proposal will be created.

- **Award:** 3 digits
  Enter the award number to be linked with the new proposal.

## *Screen Information*

- **New Proposal Number:** ? Help 7 digits
  Indicate the proposal number to be created from the specified project and award.

**New Version Number:** 3 digits
Identify the proposal version to be associated with the project number.

**Copy Project Contacts:** 1 character
Enter "Y" to copy the contacts from the project to the new proposal.

- **Copy Project Researchers:** 1 character
  Type "Y" to copy the researchers from the project to the new proposal.

- **Proposal Type:** ? Help 1 character
  Indicate the type of proposal to be created from the selected project and award.

**RFP Nbr:** 15 digits
Include the request for proposal number associated with the new proposal.

**Proposal Dept/SDept:** ? Help 5 characters
Identify the department/subdepartment associated with the proposal.

## *Additional Functions*

**PF KEYS** See the Appendix for an explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Section IV
# Project Maintenance

# Subsidiary Ledger Grant/Contract Attributes

Subsidiary Ledger (SL) grant/contract records are created and modified using Screen 9 in the **FRS module** and tie the account to a sponsored project in the **SPR module**.

The project gets expensed at the "9600" object codes and the revenue is distributed according to the distribution code also on this screen.

**This screen and fields are the critical link between SPR and FRS.**

**FRS Screen 9 – SL Grant/Contract Attributes**

```
  009 SL Grant/Contract Attributes                                  05/17/12 15:21
                                                                     FY 2011 CC 06
  Screen: ___  Account: 501430 0000 USDA ARS

  Sponsored Project: 0000009461         Billing Revenue Object: 0250
         90 Day Pre: _                 Indirect Expense Object: 9610
         Start Date: 11/01/1997        Indirect Revenue Object: 0320
           End Date: 12/31/2001  TE Certify: Y   System Member: __
TAMRF Acct/Proj Nbr: ___________   E-Verify: _         Funding:
       CS Acct Link: __ ______      ------- Responsible Persons ------
  ----- Indirect Cost ----          1: __  8uuuuuuu2  GARR, GARY G
           Base: ________           2: __  9uuuuuuu5  ANSON, ANTHONY A
           Rate: ______             3: __  _________
  Distribution: __________          4: __  _________

---------------------Project Information - Display Only -----------------------
     Short Title: SITE-SPECIFIC FARM MANAGEMENT
         Sponsor: 0000976  USDA - AGRICULTURAL RESEARCH SERVICE
       Award Nbr: 58-6204-7-068
        CFDA Nbr: 10.001  Total Awarded: 307600.00

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next        CProj AResp
```

**Use *PF8* key to add up to 26 additional responsible persons.**

## Basic Steps

- Type an account number in the ***Account*** field and press <ENTER>. If this is the number of an existing account, the SPR attribute information will display. If no attribute information displays, you can input this information in the necessary fields.
- The ***Billing Revenue Object***, ***Indirect Expense Object*** and ***Indirect Revenue Object*** fields will not automatically be populated. This change is due to the new object codes being based on source of funds rather than sponsor type.

  **These are now required fields when adding an SPR project number to an account.**

- The entry in the ***Billing Revenue Object*** field determines the ***Indirect Expense Object***, ***Indirect Revenue Object*** and ***Distribution*** (2026 ACT). Press <ENTER> to record the information.

- To create a new account from data existing on an SPR project, press ***PF7***. This is intended to reduce the amount of input to fields that will be common to the project. To use this feature, you first enter the account number that you wish to add in the ***Account*** field, and press <ENTER>. Then press ***PF7***. The pop-up window displayed asks that you enter the project number to be used to populate the SL. Include this in the field provided and press <ENTER>. Most attribute fields will be filled in with the values from the original account, but not all. The fields may be changed as necessary.
  Press ***PF8*** to add up to 26 additional responsible persons.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Account:** 10 digits
Enter a Subsidiary Ledger account number.

**SRS:** PF2 Help 1 character
Identifies if this is an SRS account.

| | | |
|---|---|---|
| N | = | No |
| Y | = | Yes |
| Blank | = | Not applicable/No/Unknown |

## *Screen Information*

**Sponsored Project:** 10 digits
Include the number assigned in the SPR module.

**90 Day Pre:** 1 character
Type "Y" if this support account can be used for pre-awards.

**Start Date:** 8 digits
Enter date funds will be designated for project.

**End Date:** PF2 Help 8 digits
Identify date the sponsored project should end.

**TAMRF Acct/Proj Nbr:** 11 digits
Include the Texas A&M Research Foundation account and project number that matches this FAMIS account.

**CS Acct Link:** ? Help 2 digits/8 digits
Enter the System Member part number and cost share account number linked to the project.

◆ **Billing Revenue Object:** 4 digits
Designate the object code used for billing project sponsor.

Only object codes 0250 through 0279, and 0286 are allowed.

- **Indirect Expense Object:** 4 digits
  Include the object code used for billing sponsor for indirect costs associated with the project. **This is filled in by FAMIS based on the code that is generated in the *Billing Revenue Object* field.**

- **Indirect Revenue Object:** 4 digits
  Enter the object code used for specifying revenue received from indirect expenses for the project.

- **TE Certify:** PF2 Help 1 character
  Signify ("Y" or "N") if the account must be Time and Effort certified. The default is blank. **If account meets the criteria for T&E certification (e.g. Federal Grant), this field will default to "Y."**

**System Member:** PF2 Help 2 digits
Include the System Member campus code.

**E-Verify:** PF2 Help 1 character
Federal contractors are required to agree to E-Verify employees paid on contracts. This flag ("Y", "N" or blank) is used to help identify the accounts and affected employees paid on these accounts.

**Funding:** 12 characters
Displays "ARRA Stimulus" if either the ***AFR Fund Group*** field on Screen 6 contains "41" (Restricted-ARRA), or if the ***Sub-Sub*** field on Screen 6 contains "AR." **Helps to track any type of special funding such as the American Recovery and Reinvestment Act (ARRA).**

**System Member:** ? Help 2 digits
Identify the TAMUS member where project is initiated.

**E-Verify:** Help 1 character
Federal contractors are required to agree to E-Verify employees paid on contracts. This flag ("Y", "N" or blank) is used to help identify the accounts and affected employees paid on these accounts.

***Indirect Cost:***

**Base:** ? Help 8 characters
Include base or rules for indirect cost charges.

**Rate:** 5 digits
Indicate rate indirect costs will be charged.

**Distribution:** ? Help 10 digits
Identify the code to be used for percentage distribution of indirect cost.

***Responsible Persons:***

**1, 2, 3, 4:** **? Help** 2 characters/9 digits
Indicate the responsible person type and identification number (UIN) of the person(s) responsible for the account. Use ***PF8*** to add additional responsible persons.

***The following fields are displayed from data input in the SPR module.***

***Project Information – Display Only***

**Short Title:** 50 characters
Shows the title of project in SPR tied to account.

**Sponsor:** 50 characters
Identifies sponsor name for the SPR project tied to this account.

**Award Nbr:** 11 digits
Indicates award number associated with project.

**CFDA Nbr:** 8 digits
Identifies the Catalog of Federal Domestic Assistance number assigned to the SPR project.

**Total Awarded:** 15 digits
Gives the total dollar amount awarded to project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Advances to the next screen.

**PF7** **Create Project**
**CProj** Create a new account from data existing on an SPR project.

**PF8** **Additional Responsible Persons**
**AResp** Used to add up to 26 additional responsible persons.

# Add New Projects

The first step in adding your project on-line is to obtain a project identification number. There are two ways to assign a project number to a new project:

1) allow FAMIS to automatically assign a sequential number

**OR**

2) manually assign the project number using Screen 110

Many users assign the account number as the project number to facilitate reporting. TAMU made this change in 1999**.**

**Screen 110 - Project Add Begin**

```
110 Project Add Begin                                          02/13/09 09:30
                                                                FY 2009 CC AM
Screen: ___

  System Assigned Number: Y              User Assigned Number: __________

==============================================================================

  To start the add of new project, perform one of the following steps:

    1) To have the system assign a project number enter a 'Y' in the
       'System Assigned Number' field.

    2) To assign your own project number enter a ten-digit project
       number in the 'User Assigned Number' field.

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type "Y" in the ***System Assigned Number*** field to have the system assign a project number.
  **OR**
- Enter a 10-digit number in the ***User Assigned Number*** field.
- Press <ENTER> to advance to Screen 111 (Project General Information).

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Screen Information*

| | |
|---|---|
| **System Assigned Number:** | 1 character<br>Type "Y" to automatically assign the project number. |

**User Assigned Number:**

**? Help** 10 digits
Enter a user assigned number in this field to manually assign the project number.

> Since 1999, TAMU uses the ***User Assigned Number*** field.
> They assign the account number as the project number. This facilitates reporting on projects.

## ***Additional Functions***

**PF KEYS**

See the Appendix for explanation of the standard PF keys.

**PF5**
**Next**

**Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Add/Modify Project Information

To begin adding information about your project, use Screen 111. Information includes the title of the project, the sponsor, and award information.

Once the project is established, this screen is also used to update existing information.

**The code entered in the *Status* field must be set to "A" to generate billing. Use status codes "N" or "T" when you are ready to stop the billing process. All other status codes will continue to produce bills.**

**Screen 111 - Project General Information - Page 1**

```
  111 Project General Information - Page 1                        06/28/11 15:10
                                                                   FY 2011 CC 02
  Screen: ___ Project: 0000415086

      Title: ED-ON-LINE ALTERNATIVE CERTIFICATION____                   SRS: _
 Long Title: ED-ON-LINE ALTERNATIVE CERTIFICATION_____________________________
             ____________________________________________________________________

         Sponsor: 0000203  U. S. DEPARTMENT OF EDUCATION
 Sponsor Awd Nbr: S350A020027_______________________________  Competitive Seg: _
          Status: T

Number of Awards: 006                            Begin Date: 11/01/2002
Total Awards Amt: 1649849.00                       End Date: 09/30/2007

    Project Type: S                         Parent Project: __________
 Instrument Type: G                     Instrument Sub-Type: OTHR
    Funding Type: R
       CFDA Code: 84.350_                       NSF Category: OTHER___
Fed Flow Sponsor: _______
                                                  Entered Date: 11/08/2002
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                     Title
```

## Definitions for Project Instrument Types

**Contract**

a) The principal purpose is to acquire services for the direct benefit or use of the government.
b) Substantial involvement is anticipated between the government and the recipient, and an executive agency determines in a specific instance that a procurement contract is appropriate.

**Grant**

The appropriate agreement to be used whenever:

a) The principal purpose is the transfer of money, property, service or anything of value to the recipient in order to accomplish a public purpose.
b) No substantial involvement is anticipated between the government and the recipient.

**Agreement**

a) The principal purpose is the transfer of money, property services or anything of value to the recipient in order to accomplish a public purpose.
b) Substantial involvement is anticipated between government and the recipient.

# Basic Steps

**New Projects**

- After you create the new project number on Screen 110, the system will automatically advance you to Screen 111.
- First, you must enter the title for the project in the ***Title*** field.
- Next, enter the sponsor number in the ***Sponsor*** field, or type a question mark (?) and press <ENTER> to find the identification number for your sponsor.
- Type the status of the project in the ***Status*** field.
- Provide the ***Project Type***, ***Instrument Type***, ***Instrument Sub-Type***, and ***Funding Type*** in the fields available.
- Include any additional information in the fields provided, as desired.
- Press <ENTER> to successfully enter the project to the record.

**Existing Projects**

- You can enter a project number in the ***Project*** field and press <ENTER> to display existing project information, if any.
- If you don't know the project number, type an (*)and press <ENTER> to select the project number from the list displayed.
- Add or modify the information, as desired.
- Press <ENTER> to record the information.

# Add/Modify Project Information

**Parent-Child Projects (One project with multiple sponsors)**

Parent-Child Projects are set up when one project has multiple sponsors. To accommodate this situation in FAMIS, you must create a "Dummy" sponsor. Then the project is split up into "child projects", each with a unique sponsor.

All accounting is posted to the Subsidiary Ledgers or Support Accounts and is not differentiated to a particular Child Project or unique sponsor.

**Screen 004 – Sponsor Maintenance**

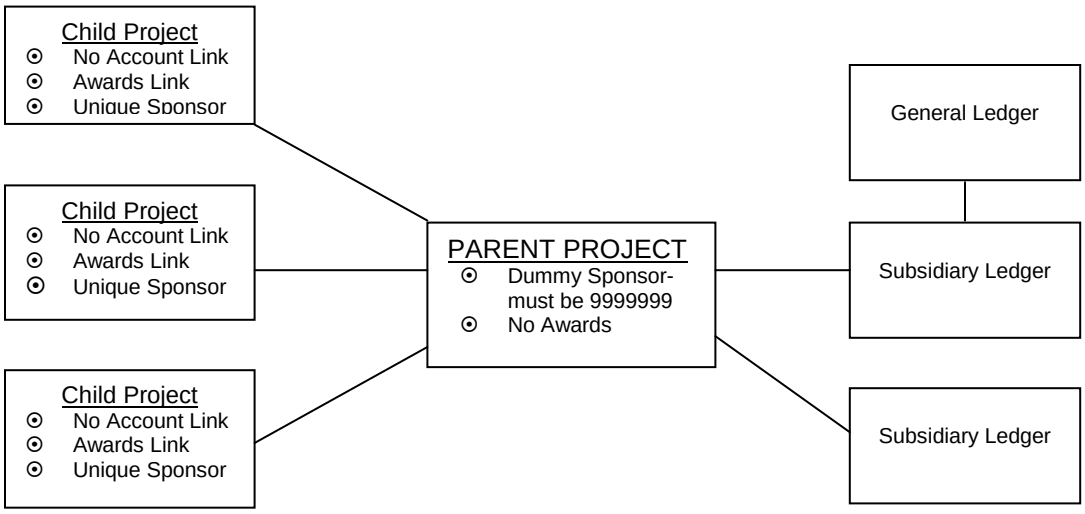
```
  004 Sponsor Maintenance                                          07/09/09 09:36
                                                                    FY 2009 CC 02
  Screen: ___ Sponsor: 0000203

     Sponsor Name: U. S. DEPARTMENT OF EDUCATION___________
Sponsor Long Name: U. S. DEPARTMENT OF EDUCATION_______________________________
     Sponsor Type: F_          State Code: DC          Tx State Agency Cd: ___
 Classification Levels: ______  ______  ______  ______  ______  ______
  Fiscal-Year-End: 00  Maestro: 690_______ Department of Education
     Restrictions: ____________________________________________________
                   ____________________________________________________
                                                  Added by: KxxxxF   07/06/1990
                            * ----- Contacts ----- *
 Sel  Type      Name                       Title                 Phone     Ext.




                       ** No contacts for this sponsor **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                     Info
```

## Chart of the Parent-Child Relations




## Indirect Cost for Parent-Child Projects

- If indirect cost rates are the same for the different sponsors at the child project level, then indirect costs can be posted through the automated postings.
- If indirect cost rates are different for the different sponsors at the child project level, then indirect costs must be posted up front and manually.

## Enter Multi-Year Projects

Multi-year projects present a special situation for entry into FAMIS. The project is set up for the full term of the contract. Then each year is entered as a separate award.

### Project 4202080000

Single Grant – Sponsor US Department of Education
Term dates are 10/01/2002 through 09/03/2005.

### Screen 111 - Project General Information – Page 1

```
  111 Project General Information - Page 1                        06/28/11 15:10
                                                                   FY 2011 CC 16
  Screen: ___ Project: 4202080000

      Title: TEACHER RECRUITMENT GRANTS - RIO_________                  SRS: _
 Long Title: TEACHER QUALITY ENHANCEMENT GRANTS FOR STATE & PARTNERSHIP_______
             ____________________________________________________________________

         Sponsor: 0000203  U. S. DEPARTMENT OF EDUCATION
 Sponsor Awd Nbr: P336C020009_______________________________  Competitive Seg: _
          Status: A

Number of Awards: 003                              Begin Date: 10/01/2002
Total Awards Amt: 1352243.00                         End Date: 09/30/2005

    Project Type: S                           Parent Project: __________
 Instrument Type: G                       Instrument Sub-Type: COMP
    Funding Type: R
       CFDA Code: 84.336_                        NSF Category: OTHER___
Fed Flow Sponsor: _______
                                                   Entered Date: 01/15/2003
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                   Title
```

### Award 1 – New Award

Amount $443081.00
Dates are 10/01/2002 through 09/30/2003

### Screen 113 – Award Information Maintenance

```
  113 Award Information Maintenance                               08/13/09 15:08
                                                                   FY 2009 CC 16
  Screen: ___ Project: 4202080000 Award: 001              Add Award: _
                       TEACHER RECRUITMENT GRANTS - RIO

      Award Type: N  NEW AWARD
          Amount: ______443081.00

      Begin Date: 10/01/2002                   End Date: 09/30/2003
    Report Month: 01                 Report Fiscal Year: 2003
        Proposal: _______ ___

 Sponsor Awd Nbr: P336C020009_______________________________  Competitive Seg: _

         Comment: YR 1 OF 3_____________________________________________
                  ______________________________________________________

     Center Dept: _____  Sub Dept: _____
         Funding: __
                                                        Added Date: 01/15/2003

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**Award 2 – Continuation**

Amount $447081.00

Dates are 10/01/2003 through 09/30/2004

### Screen 113 – Award Information Maintenance

```
113 Award Information Maintenance                                08/13/09 15:10
                                                                  FY 2009 CC 16
Screen: ___ Project: 4202080000 Award: 002                Add Award: _
                     TEACHER RECRUITMENT GRANTS - RIO

    Award Type: C  CONTINUATION
        Amount: ______447081.00

    Begin Date: 10/01/2003                    End Date: 09/30/2004
  Report Month: 01                   Report Fiscal Year: 2004
      Proposal: _______ ___

Sponsor Awd Nbr: P336C020009_____________________________  Competitive Seg: _

       Comment: YR 2 OF 3_____________________________________________
                _______________________________________________________

   Center Dept: _____  Sub Dept: _____
       Funding: __
                                                         Added Date: 01/15/2003

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**Award 3 – Continuation**

Amount $462081.00

Dates are 10/01/2004 through 09/30/2005

### Screen 113 – Award Information Maintenance

```
113 Award Information Maintenance                                08/13/09 15:11
                                                                  FY 2009 CC 16
Screen: ___ Project: 4202080000 Award: 003                Add Award: _
                     TEACHER RECRUITMENT GRANTS - RIO

    Award Type: C  CONTINUATION
        Amount: ______462081.00

    Begin Date: 10/01/2004                    End Date: 09/30/2005
  Report Month: 01                   Report Fiscal Year: 2004
      Proposal: _______ ___

Sponsor Awd Nbr: P336C020009_____________________________  Competitive Seg: _

       Comment: YR 3 OF 3_____________________________________________
                _______________________________________________________

   Center Dept: _____  Sub Dept: _____
       Funding: __
                                                         Added Date: 01/15/2003

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Total award amount is $ 1352243.00

### Screen 140 – Awards for a Project

```
  140 Awards for a Project                                          02/13/09 14:48
                                                                     FY 2009 CC 16
  Screen: ___ Project: 4202080000  TEACHER RECRUITMENT GRANTS - RIO

   Long Title: TEACHER QUALITY ENHANCEMENT GRANTS FOR STATE & PARTNERSHIP
      Sponsor: U. S. DEPARTMENT OF EDUCATION
Ttl Award Amt: 1352243.00

Sel  Awards       Begin       End        Type         Award Amount     Report
---  ------     ---------- ----------    ----       ----------------   ------
 _     001      10/01/2002 09/30/2003     N              443081.00       Y
 _     002      10/01/2003 09/30/2004     C              447081.00       Y
 _     003      10/01/2004 09/30/2005     C              462081.00       Y




 Total Award Amount:     1352243.00  Screen Amount:     1352243.00
                      *** End of Award list ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the identification number of the project you want to add or modify.

### *Screen Information*

◆ **Title:** 40 characters
Type the title of the project.

**SRS:** ? Help 1 character
Use to identify if this is an SRS account.

| | | |
|---|---|---|
| N | = | No |
| Y | = | Yes |
| Blank | = | Not applicable/No/Unknown |

**Long Title:** 130 characters
Use this field if the project title is too long for the previous field, and needs further description.

◆ **Sponsor:** ? Help 7 digits
Enter the associated sponsor's ID number.

**Sponsor Awd Nbr:** PF2 Help 40 digits
Indicate the award number assigned by the sponsor.

**Competitive Seg:** 1 character
Indicator provided by the government to designate another version of an award. (RF – for Dept DHHS awards - projects are in 4-year blocks and then continue in additional 4-year blocks - each is a competitive segment.)

◆ **Status:** ? Help 1 character
Enter the status of the project. **This code must be set to "A" to generate billing. Use status codes "N" or "T" when you are ready to stop the billing process.** All other status codes will continue to produce bills.

**Number of Awards:** PF2 Help 3 digits
Shows the number of awards that have been assigned to the project.

**Begin Date:** PF2 Help 8 digits
Displays the date the project is to begin.

**Total Awards Amt:** PF2 Help 14 digits
Shows you the total dollar amount from all awards to the project.

**End Date:** PF2 Help 8 digits
Indicates the date the project is to end.

◆ **Project Type:** ? Help 1character
Enter whether the project is a single project or parent/child.

**Parent Project:** PF2 Help 10 digits
Identify the number of the parent project – must be set to "9999999999". This field is used to consolidate information from the "child" single sponsor projects.

◆ **Instrument Type:** ? Help 1 character
Indicate the type of funding instrument: Grant, Contract, or Agreement.

◆ **Instrument Sub-Type:** ? Help 4 character
Enter the instrument sub-type for your project.

◆ **Funding Type:** ? Help 1 character
Identify how the project will be funded.

**CFDA Code:** ? Help 7 digits
Enter the Catalog of Federal Domestic Assistance Code under which the project is classified, if applicable.

**NSF Category:** ? Help 8 characters
Indicate the agency code for split-out on the NSF report.

**Fed Flow Sponsor:** ? Help 7 digits
Enter the originating Federal sponsor's identification number, if applicable.

**Entered Date:** 8 digits
Shows the date the project information was added or modified.

***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5** | **Next** |
| **Next** | Goes to the next screen that follows according to information shown on Screen 821. |
| **PF9** | **Title** |
| **Title** | Displays additional lines for the long title. |

# Enter Additional Project Information

Further information for your project is entered on Screen 112. Certain sponsors, such as Federal sponsors, require some attributes.

**To stop the calculation and posting of IDC:**

- change the ***Indirect Cost***: ***Frequency*** field to "N" (or any non "M"). Using any code EXCEPT "M" in this field will stop IDC billing.
- IDC will billed for all projects with an "M" for monthly in this field.

**Screen 112 - Project General Information - Page 2**

```
112 Project General Information - Page 2                          02/13/09 14:51
                                                                   FY 2009 CC 02
Screen: ___ Project: 0000415086  ED-ON-LINE ALTERNATIVE CERTIFICATION

Research Administrator: 8uuuuuuu0  BARNEY, BEN B

          TAMRF Number: ___________
   Prior System Project: ________________

Indirect Cost: Rate: __8.00     Base: ED415086  Level: L2_  Justification: J2_
          Frequency: M        Comment: ____________________________________

     Taxation Code: _       Comment: ____________________________________
   Equipment Title: _____   Comment: ____________________________________

  Security: _   Info Restrict: _   Mandatory Cost Share: Y     Function: 10
Int Exempt: _  Int Exe Reason: __        System Member: 02  Off Campus: _



Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**You must type "Y" to enter information on cost share screens.**

If the ***TAMRF Number*** field is **blank**, **Screen 118 puts the Sponsor in the billing address**. When you type an entry in the ***TAMRF Number*** field, then it puts "**Texas A&M Research Foundation**" in the billing address. (See Screen 118 for an example.)

## Basic Steps

- Enter a project number in the ***Project*** field and press <ENTER>.
- Enter or modify data in the fields provided.
- Press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Project:** * Help 10 digits
Enter the project identification number being added or modified.

◆ **Research Administrator:** ? Help 9 digits
Enter the identification number for the research administrator primarily responsible for the project.

***Screen Information***

**TAMRF Number:** PF2 Help 10 digits
Indicate the project number used by the Texas A&M Research Foundation for awards passed through TAMRF.

**Prior System Project:** PF2 Help 15 digits
Enter the project number assigned on another system prior to converting to FAMIS.

**Indirect Cost: Rate:** PF2 Help 6 digits
Percentage used to calculate the amount of indirect cost.

Typing "N" or any non "M" code in this field will stop calculation and posting of IDC. IDC will be billed for all projects with an "M" (monthly) code.

**Base:** ? Help 8 characters
Shows the base, or rules, for indirect cost charges.

**Level:** ? Help 3 characters/digits
Determines the level of cost values for funding the project. IDC related field.

**Justification:** ? Help 3 characters/digits
Enter the justification code to show the reason of not getting the IDC rate.

**Frequency:** ? Help 1 character
Indicate the frequency with which the indirect cost is calculated.

**Comment:** 40 characters
Enter comments about the indirect cost by using this field.

**Taxation Code:** ? Help 1 character
Enter "Y" if taxable; "N" if not taxed; or leave field blank to indicate this code is not applicable or the taxation is unknown.

**Comment:** 40 characters
Enter comments about the taxation code by using this field.

**Equipment Title:** ? Help 5 characters
Indicate who retains title to any equipment purchased. This field may be left blank if not applicable.

**Comment:** 40 characters
Enter a comment describing the Equipment Title.

**Security:** ? Help 1 character
Indicate the security level of the project, i.e., "top secret" "confidential"

**Info Restrict:** ? Help 1 character
Indicate if there is any publicity limitation on the project.

**Mandatory Cost Share:**
? Help 1 character
Enter "Y" or "N" to indicate if cost sharing is mandatory.

> You must enter "Y" to enter information on cost share screens. However, flag can be changed after date is entered on the Cost Share screen (**Screen 130**).

**Function:**
? Help 2 digits
Indicate the function code for what the money may be used.

**Int Exempt:**
1 character
Identify whether or not the project is exempt from interest calculated for past due expenses.

**Int Exe Reason:**
? Help 2 characters
Include the reason code for the project being exempt from interest payments.

**System Member:**
? Help 2 digits
Enter the TAMUS member part campus code for the project.

**Off Campus:**
? Help 1 character
Identify whether or not this is an off campus project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen according to information shown on Screen 821.

# Add/Modify Award Information

FAMIS allows you to view and maintain award information for a project, using Screen 113. As awards are made, Screen 113 allows you to add a new award to the project. **Every action on a project is treated as an award**.

**This screen must be filled in to mark the award as ARRA stimulus funds.**

**These fields must be completed to view data on Screen 147** (Display Awards for a Researcher). See **Screen 807** for further explanation of the process of reporting on Departmental awards.

**Screen 113 - Award Information Maintenance**

```
113 Award Information Maintenance                                  08/13/09 15:13
                                                                    FY 2009 CC 02
Screen: ___ Project: 0000415978 Award: 001              Add Award: _
                     ED - ACG GRANT 2006-2007 (ACADEMI

    Award Type: N  NEW AWARD
        Amount: ______440509.00

    Begin Date: 07/01/2006                  End Date: 06/30/2007
  Report Month: 08                 Report Fiscal Year: 2006
      Proposal: _______ ___

Sponsor Awd Nbr: P375A065286_____________________________  Competitive Seg: _

       Comment: GRANT IS FOR SCHOLARSHIPS ONLY._____________________
                ____________________________________________________

    Center Dept: _____  Sub Dept: _____
        Funding: __
                                                        Added Date: 09/06/2006

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**If the "Lock" process is used, you will not be able to this screen**. If the "Report" column on SPR Screen 140 is blank, the project is locked and certain award information on SPR Screen 113 and SPR Screen 114 may not be updated. If "Y" is displayed in the column, the award information has not been "locked" and can be updated. Currently only Part 06 is still using the "lock" process on proposals and projects.

## Basic Steps

### New Awards

- Go to Screen 113.
- Type the project number in the ***Project*** field.
- Type "Y" in the ***Add Award*** field and press <ENTER>.
- Enter the ***Award Type***, ***Begin Date***, and ***End Date*** of the award period.
- Type additional information in the fields, as desired.
- Press <ENTER> to record the data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## Existing Awards

- Enter a project number in the ***Project*** field and press <ENTER> to display existing project information. If you don't know the project number, type an (*) and press <ENTER> to view a list of projects to choose from. Select a project by typing an "X" in the selection field to the left of the project, and press <ENTER> to return to Screen 113.
- You may add or modify data in available fields, as necessary.
- Press <ENTER> to record the data.

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to which you will add or modify an award.

◆ **Award:** 3 digits
Indicate the award number associated with the specified project.

**Add Award:** 1 character
Type "Y" to add a new award to a project.

## *Screen Information*

◆ **Award Type:** ? Help 1 character
Enter the type of award being added or modified.

**Amount:** PF2 Help 15 digits
Type the dollar amount of the award.

◆ **Begin Date:** PF2 Help 8 digits
Enter the start date for the award.

◆ **End Date:** PF2 Help 8 digits
Include the date the award will end.

◆ **Report Month:** ? Help 2 digits
Indicate the month in which to report award. (Example: Sept = "01")
***Must be an open month.***

**Report Fiscal Year:** ? Help 4 digits
Indicate the year to report the award.

**Proposal:** ? Help 7 digits/3 digits
Enter the proposal number and verification number.

**Sponsor Awd Nbr:** 40 digits
Enter the award number assigned by the sponsor. ***May not have to type.***

**Competitive Seg:** 1 character
Indicator provided by the government to designate another version of an award. (RF – for Dept DHHS awards - projects are in 4-year blocks and then continue in additional 4-year blocks - each is a competitive segment.)

**Comment:** 100 characters
Enter general comments about the award.

**Center Dept:** **? Help** 4 characters
Include the Center department code.

**Sub Dept:** **? Help** 4 characters
Enter the Center subdepartment code.

**Funding:** **? Help** 2 characters
Identify the code to help track any type of special funding such as the American Recovery and Reinvestment Act (ARRA).

| | | |
|---|---|---|
| AR | = | ARRA Stimulus Funding |
| Blank | = | Not specified |

**Added Date:** 8 digits
Shows the date the award was added to the project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Enter Researcher Award Distribution

You may view or enter the awards, and the amounts allotted to each researcher using Screen 114. This screen provides information that can be used to maintain the distribution of award dollars among your project researchers.

You can view the award distribution and Maestro information on one screen, or press ***PF6*** to turn on the panel scroll feature to change the display of the research award distribution.

**If the "Lock" process is used, you will not be able to this screen.** If the "Report" column on SPR Screen 140 is blank, the project is locked and certain award information on SPR Screen 113 and SPR Screen 114 may not be updated. If "Y" is displayed in the column, the award information has not been "locked" and can be updated. Currently only Part 06 is still using the "lock" process on proposals and projects.

If you have update access to this screen, you may modify the Maestro fields on closed awards.

**Screen 114 - Researcher Award Distribution**

```
   114 Researcher Award Distribution                                 06/09/10 14:17
                                                                      FY 2010 CC 02
   Screen: ___ Project: 0000404142 Award: 001  A NANOSCALE MICROFLUIDIC SAMPLER:

 Award Amount:        10000.00   Distributed Amt:       10000.00   Auto Dist: _
    P
  F I Researcher Dept  SDept   Award Amount  Researcher Name      Dept Name
  _ 1 6uuuuuuu9  OCNG_ _____ _______10000.00 BROWN, BONITA B      OCEANOGRAPHY
 Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

  _ 2 8uuuuuuu7  SEAG_ _____ _______________ STANSEL, STANLEY S   SEA GRANT PROG
 Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

  _ _ __________  _____ _____ _______________
 Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

  _ _ __________  _____ _____ _______________
 Center CC: __ Dept: _____ SDept: _____ Admn For CC: __ Dept: _____ SDept: _____

                      Screen Total:        10000.00

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp        Next  PanON
```

With use of the **Panel ON** feature (***PF6***), there are 3 panels to display.

The following screen shows the display after **pressing *PF6* to turn panels on**. Press ***PF11*** to view the additional panels of information.

### Screen 114 - Researcher Award Distribution (Panel 1)

```
  114 Researcher Award Distribution                                 06/07/10 09:30
                                                                     FY 2010 CC 02
  Screen: ___ Project: 0000404142 Award: 001  A NANOSCALE MICROFLUIDIC SAMPLER:
                                                                  Panel: 01 More >>
Award Amount:        10000.00   Distributed Amt:       10000.00   Auto Dist: _
   P
 F I Researcher Dept  SDept   Award Amount  Researcher Name      Dept Name
 _ 1 6uuuuuuu9  OCNG_ _____ _______10000.00 BROWN, BONITA B      OCEANOGRAPHY
 _ 2 8uuuuuuu7  SEAG_ _____ _______________ STANSEL, STANLEY S   SEA GRANT PROG
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
 _ _ __________  _____ _____ _______________
                     Screen Total:        10000.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  NOPan                   Left  Right
```

### Screen 114 - Researcher Award Distribution (Panel 2)

```
  114 Researcher Award Distribution                                 06/09/10 14:19
                                                                     FY 2010 CC 02
  Screen: ___ Project: 0000404142 Award: 001  A NANOSCALE MICROFLUIDIC SAMPLER:
          << More                                                 Panel: 02 More >>
Award Amount:        10000.00   Distributed Amt:       10000.00   Auto Dist:
   P                  Center                                          Center
 F I Researcher CC Dept  SDept   Award Amount  Researcher Name      Dept Name
 _ 1 6uuuuuuu9  __ _____ _____ 10000.00        BROWN, BONITA B
 _ 2 8uuuuuuu7  __ _____ _____                 STANSEL, STANLEY S
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
 _ _ __________  __ _____ _____
                     Screen Total:        10000.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next  NOPan                   Left  Right
```

**Screen 114 - Researcher Award Distribution (Panel 3)**

```
   114 Researcher Award Distribution                                 06/09/10 14:21
                                                                      FY 2010 CC 02
   Screen: ___ Project: 0000404142 Award: 001  A NANOSCALE MICROFLUIDIC SAMPLER:
           << More                                                   Panel: 03
 Award Amount:        10000.00   Distributed Amt:       10000.00   Auto Dist: _
    P                 Admin For                                       Admin For
  F I Researcher CC Dept  SDept   Award Amount  Researcher Name        Dept Name
  _ 1 6uuuuuuu9  __ _____ _____ 10000.00        BROWN, BONITA B
  _ 2 8uuuuuuu7  __ _____ _____                 STANSEL, STANLEY S
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
  _ _ __________ __ _____ _____
                     Screen Total:        10000.00
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next  NOPan                   Left  Right
```

Using question mark (?) or the ***PF2*** key on the ***Center***, ***Admin Dept***, and ***SDept*** code fields will display the codes for other campuses.

```
+-------------------------------------------------------------------------+
| More entries - select or press <ENTER> to scroll                        |
| Search Criteria: ____________________ CC: 02  Type: N (N=Name,I=ID)     |
|                  Exp Only: N Include FRS: Y (Y,N) FFX: N (Y,N)          |
|              Sub                                                        |
|   Sel Dept   Dept              Department Name                FRS FFX CEN |
|    _  BUSP          BUSINESS UNDERGRADUATE SPECIAL PROGRAMS   Y   Y     |
|    _  COPS   MASD   CAMPUS & COMMUNITY RESPONSE SYSTEMS COMM  Y   N     |
|    _  CARC          CAREER CENTER                             Y   N     |
|    _  CARC   ATHL   CAREER CENTER - ATHLETIC CAREER SERVICES  Y   N     |
|    _  CARC   COOP   CAREER CENTER - COOPERATIVE EDUCATION     Y   Y     |
|    _  CARC   PLACE  CAREER CENTER - PLACEMENT SERVICES        Y   Y     |
|    _  CBAF          CBA FELLOWS & HONORS PROGRAMS             Y   Y     |
|    _  SAED          CENTER FOR ALCOHOL AND DRUG EDUCATION ST  Y   N   Y |
|    _  CAT           CENTER FOR APPROXIMATION THEORY           Y   N     |
|    _  CBCR          CENTER FOR BIOLOGICAL CLOCKS RESEARCH     Y   N     |
|    _  BNMR          CENTER FOR BIOLOGICAL NUCLEAR MAGNETIC R  Y   N     |
|    _  CCCA          CENTER FOR CHEMICAL CHARACT AND ANALYSIS  Y   Y   Y |
|                                                                         |
|                  Select a Dept or Press <PF4> to Quit                   |
+-------------------------------------------------------------------------+
```

# Basic Steps

- Enter a ***Project Number*** and ***Award*** in the fields provided and press <ENTER> to display existing project information. Note, you may also press ***PF6*** to turn on the panel feature and scroll right to view 3 panels of information.
- Provide ***PI*** code, ***Researcher***, and department information in the fields available to add or update researcher data.
- Add or modify additional data in the fields provided, as desired.
- Press <ENTER> to record the data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number being added or modified.

◆ **Award:** 3 digits
Indicate the award number associated with the specified project.

## *Screen Information*

→ **Panel 1 (NOPan)**

**Award Amount:** ? Help 15 digits
Displays the dollar amount of the award previously entered on Screen 113.

**Distributed Amt:** 15 digits
Shows the total dollar amount distributed among the researchers working on the proposal to date. Not all dollars must be distributed.

**Auto Dist:** 1 character
Enter a "Y" in this field to automatically distribute the total award amount evenly among several researchers.

**F:** ? Help 1 character
Indicate whether or not you wish to add, update, or delete researcher information.

◆ **PI:** ? Help 1 digit/character
Identify the principal investigator level of the researcher.

◆ **Researcher:** ? Help 9 digits
Enter the researcher's identification number taken from researcher file.

◆ **Dept:** ? Help 5 characters
Enter the code for the department the researcher is associated with.

**SDept:** 5 characters
Enter the code for the researcher's sub-department.

**Award Amount:** PF2 Help 15 digits
Include the award amount distributed to the researcher(s).

**Researcher Name:** 30 characters
Displays the researcher's full name, which is taken from the researcher file.

**Dept Name:** 4 characters
Shows the name of the department associated with the researcher, which is taken from the department code entered.

**Center CC:** ? Help 2 digits
Include the Campus Code where the Center department and subdepartment are located.

**Dept:** ? Help 4 characters
Enter the department code.

**SDept:** PF2 Help 4 characters
Include the subdepartment code.

**Admin For CC:** ? Help 2 digits
Include the Campus Code for the Administered For department and subdepartment.

**Dept:** ? Help 4 characters
Enter the Administered For department code.

**SDept:** PF2 Help 4 characters
Include the Administered For subdepartment code.

**Screen Total:** 15 digits
Provides the total dollar amount of award items listed is included on this screen.

→ **Panels 2 & 3**
These panels are available if ***PF6*** PanON is active. Information will be displayed in columns.

## ***Additional Functions***

**F KEYS** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

**PF6 PanON** **Panel On**
Press this key to display information in list format, with 2 additional panels of information.

**OR**

**PF6 NOPan** **No Panel**
Returns the display to the original screen format, showing the information on one screen.

# Enter Project Billing Information

With the proper information, FAMIS creates sponsor bills to be mailed to the sponsor for payment. Also, by option, programs are run to create an Accounts Receivable invoice and post the appropriate entries to FRS. The SPR billing programs are run at the end of the month with the regular month-end jobs. Use Screen 116 to enter and/or maintain billing information.

**Screen 116 - Project Billing Information**

```
  116 Project Billing Information                                  02/13/09 15:16
                                                                    FY 2009 CC 02
  Screen: ___ Project: 0000426034  SAIC-FREDERICK-NCI-PROTEOMIC TECHNOLOGY

 Bill Mode: A  Type: R  Frequency: M
                                      Beg Date for Next Bill Cycle: 02/01/2009
         First Bill Date: 04/30/2006      Estimated Next Bill Date: 02/28/2009
  Final Installment Date: __________              Last Date Billed: 01/31/2009
 Regular Installment Amt: _______________       Last Invoice Number: R012164
                                                 Last Bill Sequence: 0034
 Letter of Credit Group: ______
        Project Summary: Y    Print Outstanding Inv Summ: Y   Certification: Y

 Retention Percent: ______                              Limit: _______________
 Retention Balance:                    Retained from Billing: _______________
 --------------------------- Information Only Fields ---------------------------
           Comment: REQUIRES ORIG/2 COPIES_________________
       Form Number: ________      Number Copies: __       Cost Share Report: _
    Detail Expense: Y             Manual Backup: Y
   Payroll Summary: Y            Payroll Detail: Y

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next
```

## Project Billing Information

**Project bills cannot be produced to the child level.**

Three types of billings are accommodated on this screen:

| Bill Type | Description |
|---|---|
| O | Manual billing – not FAMIS produced |
| R | Cost reimbursable bills that are based on actual expenses |
| I | Regular installments amounts |

Note that "non-regular" installment amounts, can be entered using Screen 117. This screen allows entry when the following fields on Screen 116 are:

***Bill Mode*** = A or M (automatic or manual)
***Type*** = I (installment)
***Frequency*** = H (according to sponsor schedule)

The combination of the ***Bill Mode***, ***Type*** and ***Frequency*** fields are very important in defining how and when your bills will be produced. Look carefully at the valid values available to you.

**It is best not to use "Annual" billing for multiple years - do one year at a time.**

For example:

- Bill Mode "**R**" produces an invoice report only with no posting in FAMIS.
- Bill Mode "**A**" produces an invoice and posts to FAMIS.

***Bill Mode*:** "R" produces the Z invoice number
All other bill types produce an R number

***Type*:** "R" = reimbursable

***Both "R" and "Z" invoices come out of the same program.***

| |
|---|
| To STOP the printing of SPR bills, change the Project Status Code on Screen 11 to "T" or "N." |

# Invoice Form

When setting up your invoice form with FAMIS Services, you have to determine the letterhead portion of the form. In addition, you set prodcards to control ranges for totals and text to print on the bills. Below is a sample:

**Prodcard 1 -- Sets up the ranges for totals.**

The columns are:

1-2 major group code
4-5 minor group code
7-10 begin object code range
12-15 end object code range

01\01\1000\1899\SALARIES AND WAGES
01\02\1900\1999\BENEFITS
01\03\2000\3999\TRAVEL
01\04\4000\4999\SUPPLIES
01\05\5000\7999\OTHER EXPENSES
01\06\8000\8999\EQUIPMENT
02\01\9600\9699\INDIRECT COST

**Prodcard 2 -- Prints on the bills.**

***CC 02 (TAMU)* Example*:***

Please make check payable to TAMU and reference invoice number on check. Mail check to TAMU - Contract Administration, College Station, TX 77843-1260. For inquiries, please call (979) 888-0000.

Approved: _____
Contract Financial Administrator Date

***CC 07 (AL-EXT) Example:***

Please make checks payable to the Texas AgriLife Extension Service. If You have any questions, please call John Smith at (979) 999-8888.

Approved: _____
TAEX Contracts Administrator

**Prodcard 3 -- (used mainly by CC 99 - Research Foundation; most other parts leave this prodcard blank)**

Expenses incurred prior to Termination.

This is not a Final Invoice.

# Basic Steps

- Enter a project number in the ***Project*** field and press <ENTER> to display existing project information. If the project number is not known, you may type an asterisk (*) in this field and press <ENTER> to view a list of projects. Select a project by typing an "X" in the selection field to the left of the project, press <ENTER>, and you will be returned to Screen 116.
- Type the ***Bill Mode***, ***Type***, and ***Frequency*** in the appropriate fields.
- Indicate the dates as required by the type of billing.
- Designate the regular installment amounts, if applicable.
- Type additional data in the available fields, as desired and press <ENTER> to record data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the billing information you are adding.

## *Screen Information*

◆ **Bill Mode:** ? Help 1 character
Indicate the method by which you intend to perform billing for the project.

◆ **Type:** ? Help 1 character
Signify the type of billing you will implement.

◆ **Frequency:** ? Help 1 character
Enter the frequency with which billing will be processed for your project.

| | | |
|---|---|---|
| A | = | Annual |
| BLANK | = | No Billing Freq. Requirement |
| H | = | According to Sponsor Schedule |
| L | = | Lump-Sum (Manual Bills Only) |
| M | = | Monthly |
| O | = | Other (Manual Bills Only) |
| Q | = | Quarterly |
| S | = | Semi-Annual |

◆ **Beg Date for Next Bill Cycle:** 8 digits
Enter the date of the next billing cycle. This is the first date to pick up expenses. Disregard for installment scheduling. You still have to enter this, but it is only used to find the next installment.

◆ **First Bill Date:** 8 digits
Indicate the beginning date for producing the bills. ***The date must be the last date of the month.***

If using "Annual" billing this defines the "year" (i.e. 05/30/08 will be May to May).

**Estimated Next Bill Date:** 8 digits
Displays the calculated date in FAMIS on which the system will generate the next bill.

◆ **Final Installment Date:** 8 digits
Provide the date of the final installment.

**Last Date Billed:** 8 digits
Displays the date the last bill was generated by the system.

◆ **Regular Installment Amt:** 14 digits
Indicate the amount of the installment if in regular payments.

**Last Invoice Number:** 6 digits
Displays the last invoice processed, which is recorded by the system.

**Last Bill Sequence:** PF2 Help 4 characters
Provide the number of times this project has been billed or invoiced.

**Letter of Credit Group:** PF2 Help 6 characters
Indicate the agency or department code providing the letter of credit.

**Project Summary:** ? Help 1 character
Type "Y" to indicate that the project summary must be included with the bill.

**Print Outstanding Inv Summ:** ? Help 1 character
Enter "Y" to signify that you wish to print information about any outstanding invoices associated with the project.

**Certification:** ? Help 1 character
Type "Y" if certification (signature) is to be printed on the invoice. The certification wording is in a prodcard.

**Retention Percent:** PF2 Help 6 digits
Enter a retention percentage. **Used to "retain" or "hold back" billing some expenses until the end of the project.**

**Limit:** PF2 Help 14 digits
Indicate the limit of retention. Once the limit is reached, no more retention will be taken.

**Retention Balance:** 14 digits
Displays the amount of retention made to date.

**Retained from Billing:** PF2 Help 14 digits
A system-maintained field indicating the total, retained as of the last billing.

**Comment:** 40 characters
Indicate the kind of special handling needed with the billing.

**Form Number:** PF2 Help 8 digits
Enter the Federal form number to be used for billing.

**Number Copies:** PF2 Help 2 digits
Enter the number of copies of the report needed.

**Cost Share Report:** ? Help 1 character
Type "Y" to create a report for the billing clerk.

**Detail Expense:** ? Help 1 character
Enter "Y" to indicate that expense detail must accompany the bill.

**Manual Backup:** ? Help 1 character
Type "Y" to designate a manual backup must be done and included with the bill.

**Payroll Summary:** ? Help 1 character
Enter "Y" to if a payroll summary should be included with the bill.

**Payroll Detail:** ? Help 1 character
Type "Y" to include payroll detail information with the bill.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Enter Project Installment Schedules

For those cases when the sponsor has given you an installment schedule, you may enter the dates and amounts on Screen 117. For FAMIS programs to produce the bills, the ***Date*** field must be the last day of a month. When the end of month billing programs are run, the bills will reflect the dates and amounts entered.

This screen is **protected** unless the information on Screen 116 reads:

| | | | |
|---|---|---|---|
| Bill Mode | A | = | Automatic FAMIS Produces bill |
| **OR** | | | |
| Bill Mode | M | = | Manual |
| Type | I | = | Installment |
| Frequency | H | = | According to Sponsor Schedule |

**Screen 117 - Project Installment Schedule**

```
117 Project Installment Schedule                                  02/13/09 15:21
                                                                   FY 2009 CC 99
Screen: ___ Project: 4680210000  (AFRAPT) RESEARCH FOR ADVANCED AIRCRAFT

     Bill Type Code: I

     ---------- Enter the Billing Installment Schedule Below ----------
       Date            Amount                Date            Amount
     08/15/1995    _______7162.00          __________    ______________
     10/15/1995    _______7160.00          __________    ______________
     12/15/1995    _______7160.00          __________    ______________
     02/15/1996    _______7160.00          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________
     __________    ______________          __________    ______________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Enter a project number in the ***Project*** field and press <ENTER>.
- Type the necessary installment schedule date and amount in the fields available.
- Press <ENTER> to record the data.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the billing information you are creating or modifying.

## ***Screen Information***

**Bill Type Code:** PF2 Help 1 character
Enter the bill type code that was entered on Screen 116.

**Date:** 8 digits
Enter the date the installment is to be billed.
Must be last day of the month for FAMIS produced bills.

**Amount:** 14 digits
Indicate the amount to be billed for each installment.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Enter Project Bill To Address

Use Screen 118 to enter the project bill to address as it is to be displayed on the invoice. This screen will allow you to enter the name, address, title, and other important address information.

**Screen 118 - Project Bill To Address**

```
  118 Project Bill to Address                                    09/13/09 15:23
                                                                  FY 2009 CC 02
  Screen: ___ Project: 0000455397  AAHE-PROJECTS WITH PROMISE/WYLIE

BILL TO:   Name: DR. CARLA C. CARSON___________   Phone: 777-444-2999 Ext: ____
          Title: BBHE SENIOR ASSOCIATE____          Fax: 777-444-4999
        Address: ROSWELL INST OF TECHNOLOGY____
                 11 MEMORIAL DRIVE______________
                 LBJ-2222_______________________
           City: ROSWELL_______________ State: NV Zip: 14444____
        Country: ___

                 ******* As Displayed on Invoice *******

                 DR. CARLA C. CARSON
                 BBHE SENIOR ASSOCIATE
                 ROSWELL ASSOCIATION FOR HIGHER EDUCATIO
                 ROSWELL INST OF TECHNOLOGY
                 11 MEMORIAL DRIVE
                 LBJ-2222
                 ROSWELL, NV 14444
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

If there is data entered in the ***TAMRF Number*** field on **Screen 112**, "**Texas A&M Research Foundation**" will be displayed as part of the address.

```
  118 Project Bill to Address                                    09/13/09 15:23
                                                                  FY 2009 CC 02
  Screen: ___ Project: 4262110000  XYZ RESEARCH MODEL

BILL TO:   Name: STRX INTERNATIONAL_____________   Phone: 777-111-2999 Ext: ____
          Title: ATTN: S. SMITH, AD111____          Fax: 777-111-4999
        Address: 333 MAIN STREET_________________
                 ________________________________
                 ________________________________
           City: MISSION_______________ State: IL Zip: 99999____
        Country: ___

                 ******* As Displayed on Invoice *******

                 STRX INTERNATIONAL
                 ATTN: S. SMITH, AD111
                 TEXAS A&M RESEARCH FOUNDATION
                 333 MAIN STREET
                 MISSION, IL 99999


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter the data in the ***BILL TO*** address fields.
- Press <ENTER> to record the data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the billing information being added or updated.

## *Screen Information*

**BILL TO:** PF2 Help 30 characters

**Name:** Type the name of the person or department to be billed.

**Phone:** 12 digits
Enter the phone number of the person or department to be billed.

**Ext:** 4 digits
Indicate the phone extension number to be dialed, if available.

**Title:** 25 characters
Type the title of the person receiving the bill.

**Fax:** 12 digits
Enter the FAX number of the person or department being billed.

**Address:** 3 lines/30 characters
Enter the address where the bill should be sent.

**City:** 20 characters
Indicate the city location where the bill will be mailed.

**State:** ? Help 2 characters
Identify the state location where the bill will be sent.

**Zip:** 9 digits
Record the ZIP code for the address of the bill being mailed.

**Country:** ? Help 3 characters
Indicate the country where the person resides.

*********As Displayed on Invoice*********

Shows the name and address as it is listed on the invoice.

(Reminder: if there is data in the ***TAMRF Number*** field on Screen 112, **"TEXAS A&M RESEARCH FOUNDATION"** will be displayed as part of the address.)

## *Additional Functions*

**PF KEYS** See Appendix for explanation of standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Enter Project Reporting Requirements

FAMIS allows you to add, view and maintain reporting requirements for a project using Screen 115.

Report requirements are entered in segments. A segment is a combination of a category/report type/frequency and can be seen as one line on this screen. A segment can be entered one of two ways:

(1) by positioning the cursor on the desired line, pressing ***PF10*** (CrTrk) and entering the data directly onto this screen

**OR**

(2) by running the SBAU115 batch program. This program will create new segments based on the fields noted below, ***First Due Date*** and ***Last Due Date***. The batch program includes a two month window, so you will see segments up to two months before their appropriate dates. (The two month window is not available online).

To view the further report detail for a project, go to Screen 127.

The report, **SBAR143**, lists segments that are overdue and coming due segments, but only those that are active and not completed, skipped or deleted.

**Screen 115 - Project Reporting Requirements**

```
  115 Project Reporting Requirements                                  02/13/09 15:27
                                                                       FY 2009 CC 02
  Screen: ___ Project: 0000455515  AAHPERD-MOTOR IDEATION IN CHILDREN

       Rpt                  Form       First        Last      Modify     Modify
 Cat  Type  Frq  Copies   Number     Due Date    Due Date   UserID      Date

  TE   PRG   S    __2    ________   09/30/2005  03/31/2006  KxxxxxP   05/11/2005
  TE   ___   F    __1    ________   04/15/2006  04/15/2006  KxxxxxP   05/11/2005
  FI   ___   F    __1    ________   04/15/2006  04/15/2006  KxxxxxP   05/11/2005
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________
  __   ___   _    ___    ________   __________  __________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                          CrTrk
```

## Basic Steps

- Enter a project number in the ***Project*** field and press <ENTER> to display existing project information. If the number is not known, you may type an asterisk (*) in this field to select from a list in the pop-up window.
- To add a segment, press ***PF10*** and fill in the category (***Cat***), frequency (***Frq***), and the ***First Due Date*** fields.
- Type additional data in the available fields, as desired, and press <ENTER> to record your data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number.

## *Screen Information*

**"Cat/Rpt Type" together make up a segment.**

◆ **Cat:** ? Help 2 characters
Enter the category associated with the report.

**Rpt Type:** 3 characters
Indicate the type of report for this project. You may view valid codes for Report Type using the **? Help** on the ***Cat*** field.

◆ **Frq:** ? Help 1 character
Identify the frequency with which reports will be provided.

**Copies:** 3 digits
Enter the number of copies needed.

**Form Number:** PF2 Help 8 characters/digits
Indicate the form number required when reporting for federal projects.

◆ **First Due Date:** 8 digits
Enter the date the report is first due.

**Last Due Date:** 8 digits
Enter the date that the last report is due.

**Modify User ID:** 8 characters/digits
Shows the user ID of the last person who modified this entry.

**Modify Date:** 8 digits
Indicates the date on which the last user modified this entry.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

**PF10** **Create Report Tracking**
**CrTrk** Creates a new segment or if the segment already exists, creates a sequence.

# Project Report Tracking

You may track project report sequences in FAMIS using Screen 127. A sequence is an iteration of a segment. The sequence has different dates connected with it.

All entries from this screen are kept for an audit trail. You may delete an entry that was entered online, but you may not delete sequences that were created by the batch program. To "disallow" them, you can change the status to "S" (SKIP) in the ***St*** field.

Will not automatically put data on this screen. You must use ***PF10*** on Screen 115.

**Only update and delete functions are allowed on this screen.**
**If you want to add a project report, use Screen 115.**

**Screen 127 - Project Report Tracking**

```
127 Project Report Tracking                                          02/13/09 15:37
                      PEACHES                                         FY 2009 CC AB
Screen: ___  Project: 0000000006  Cat: __  Rpt Type: ___  Date: _________
                       Include Only: Due/Overdue: _   Completed/Skipped: _

      Rpt                        Form            Date Rcvd   Date Sent   S  Seq.
F Cat Type   Due Date   Frq    Number  Copies   from PI    to Sponsor  t  No.
_  IN       01/29/2005   S                     __________  __________  _    1
   Note: _____________________________________________________________________
_  IN  CON  06/30/2005   A    23456     22     __________  __________  _    1
   Note: _____________________________________________________________________
_  IN  CON  06/30/2005   A    23456     22     __________  __________  _    2
   Note: _____________________________________________________________________
_  IN  CON  01/01/2005   S    123456    100    __________  __________  _    1
   Note: _____________________________________________________________________
_  IN  CON  07/01/2006   S    123456    100    __________  __________  _    1
   Note: _____________________________________________________________________
   IN  CON  07/01/2006   S    123456    100    __________  __________  S    2
   Note: _____________________________________________________________________

                      ** Press Enter for More Reports **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**Can use for corrections or change/orders**

## Project Report Tracking Process

The status of a sequence changes to "Complete" when an entry is made in the ***Date Sent to Sponsor*** field.

### Segment/Sequence

A segment is a unique combination of a category/report type/frequency. Multiple reports can be required for a segment. You can copy or create a new sequence that identifies a different set of dates to be reported for the same segment. The sequence numbers appear under the ***Seq. No.*** column.

**Sequence**

You can create a new sequence using the ***PF10*** key on Screen 115. If a segment already exists, a sequence is created. In the following example, the segment exists so a new sequence will be created.

```
+-------------------------------------------------------+
|                                                       |
|                                                       |
|  Create Report Segment:                               |
|    Project:  0000000006 Cat:  IN Type:  CON Frq:  S   |
|    First Due Date:  07/01/2000                        |
|    Last  Due Date:                                    |
|                                                       |
|    Next  Due Date:  07/01/2006  Segment(s) Exist      |
|                                                       |
|                ** Press <PF4> to Quit **              |
+-------------------------------------------------------+
```

**Status**

The following are valid status entries:

B = Not Specified
C = Complete
D = Delete (Batch-Created records only)
S = Skip

# Basic Steps

- Enter a project number in the ***Project*** field and press <ENTER> to display existing project information. If the number is not known, you may type an asterisk (*) in this field to select from a list in the pop-up window.
- Provide the category (***Cat***), report type (***Rpt Type***), d*ue date* (***Date***) in the fields provided, and indicate if you want to include ***Due/Overdue*** or ***Complete/Skipped*** project reports.
- Type additional data in the available fields, as desired.
- Press <ENTER> to record your data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Project:** * Help 10 digits
Enter the project number.

**"Cat/Rpt Type" together make up a segment.**

◆ **Cat:** ? Help 2 characters
Enter the category associated with the report.

**Rpt Type:** 3 characters
Indicate the type of report for this project. You may view valid codes for Report Type using the **? Help** on the ***Cat*** field.

**Date:** 10 digits
Include a date to filter the list to be displayed.

**Include Only: Due/Overdue:** 1 character
Type "Y" to include reports that are due and/or overdue.

**Completed/ Skipped:** 1 character
Type "Y" to include reports that have a status of completed or skipped.

## ***Screen Information***

**F:** 1 character
Type the described function code.
U = Update
D = Delete
Use **Screen 115** to add a segment or sequence.

**Cat:** PF2 Help 2 characters
Displays the category code. Examples:
IN = Invention
PR = Property
TE = Technical

**Rpt Type:** 3 characters
Shows the report type. Examples:
CON = Invention-Upon Conception
INT = Invention-Interim
AWP = Technical-Annual w/Proposal

**Due Date:** 8 digits
Identifies the due date for the project report.

◆ **Frq:** PF2 Help 1 character
Indicates the frequency with which reports will be provided.

**Form Number:** 8 characters/digits
Displays the form number required when reporting for federal projects.

**Copies:** 3 digits
Identifies the number of copies of the report needed.

◆ **Date Rcvd From PI:** 8 digits
Enter the date that the report is received from the Principal Investigator.

**Date Sent to Sponsor:**
8 digits
Enter the date the report was sent to the Sponsor.
Entering a date in this field completes the tracking.

**St:**
**PF2 Help** 1 character
Record the status of the project report.

| | | |
|---|---|---|
| B | = | Not Specified |
| C | = | Complete |
| D | = | Delete (Batch-created records only) |
| S | = | Skip |

**If you use "Skip" you won't be able to work with the sequence again.**

**Seq. No.:**
1 digit
Identifies the sequence number of the report.

## ***Additional Functions***

**PF KEYS**
See the Appendix for explanation of the standard PF keys.

**PF5**
**Next**
**Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Project Due/Overdue Report Tracking

Screen 143 is used to track project report segments that are due or overdue. This screen is in date, category and type order.

Selecting a project from this screen will advance you to Screen 127, which will show you all the sequences and additional detail about the report segment.

**Screen 143 – Project Due/Overdue Report Tracking**

```
  143 Project Due/Overdue Report Tracking                          02/13/09 15:41
                                                                    FY 2009 CC 99
  Screen: ___  Date: __________
               Include Only: Due/Overdue: _  Cat: __  Rpt Type: ___

                Rpt                                   Form         Dt Rcvd  Seq
 S Due Date Cat Typ   Project      Title          Frq Number Copies from PI  Nbr
 _ 09/30/97 TE  PRG  4810010000 TEXAS-LOUISIANA   C                10/31/97   1
   Note: /////////////////
 _ 03/01/06 FI       4550810000 CP VIOLATION IN   Q SF272      1              1
   Note:
 _ 03/15/06 FI       4515410000 ASSIMILATING SAT  Q 272        1              1
   Note:
 _ 03/15/06 TE  PRG  4729600000 AUTOMATED VMS ME  M                          1
   Note:
 _ 03/15/06 TE  PRG  4747900000 TRANSPORTATION P  M            3              1
   Note:
 _ 03/28/06 FI       4817210000 ALTERNATIVE SPLI  F FINALINV                  1
   Note:

                      ** Press Enter for More Reports **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Select a tracking segment by typing "X" in the ***S*** (Select) field and pressing <ENTER> to proceed to Screen 127.
- To filter the project display, type the desired information in the fields provided.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Date:** 8 digits
Enter the desired due date.

**Include Only: Due/Overdue:** 1 character
Type "Y" to include reports due and/or overdue.

◆ **Cat:** ? Help 2 characters
Enter the desired category.

**Rpt Type:** 3 characters
Indicate the type of report requested for this project. You may view valid codes for Report Type typing a question mark in the ***Cat*** field.

## *Screen Information*

**S:** 1 character
Type "X" to select a tracking segment and proceed to Screen 127 to view the detail.

**Due Date:** 8 digits
Identifies the due date for the project report.

**Cat:** PF2 Help 2 characters
Displays the category code. Examples:

| | | |
|---|---|---|
| IN | = | Invention |
| PR | = | Property |
| TE | = | Technical |

**Rpt Type:** 3 characters
Shows the report type. Examples:

| | | |
|---|---|---|
| CON | = | Invention-Upon Conception |
| INT | = | Invention-Interim |
| AWP | = | Technical-Annual w/Proposal |

**Project:** 10 digits
Identifies the project number.

**Title:** PF2 Help 16 characters
Displays the title of the project.

◆ **Frq:** PF2 Help 1 character
Indicates the frequency with which reports will be provided.

**Copies:** 3 digits
Shows number of copies of the report needed.

◆ **Date Rcvd From PI:** 8 digits
Shows the date that the report is received from the Principal Investigator.

**Seq. No.:** 1 digit
Identifies the sequence number of the segment for a report.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Add/Modify Project Researcher Information

You may view information for the researchers and departments by using Screen 119. This screen is available to maintain project researcher information.

This data must be entered to view "**Projects by Researcher**" on **Screen 142**.

**Screen 119 - Project Researcher Information**

```
119 Project Researcher Information                                  02/16/09 08:50
                                                                     FY 2009 CC 02
Screen: ___ Project: 0000404142  A NANOSCALE MICROFLUIDIC SAMPLER:

   P
F  I Researcher  Dept   SDept  Researcher Name            Dept Name
_  1  6uuuuuuu9  OCNG_  _____  BIERS, BRENDA B            OCEANOGRAPHY
_  2  8uuuuuuu7  CLGE_  _____  SELLERS, SAMUEL S          COLLEGE GEOSCIENCE
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____
_  _  _________  _____  _____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter the desired function (***F***), investigator level (***P***), the researcher's UIN (***Researcher***), and the department codes (***Dept***) and (***SDept***) in the appropriate fields.
- Press <ENTER> to record the data.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the researcher information you are adding or updating.

### *Screen Information*

◆ **F:** ? Help 1 character
Indicate whether to add, update, or delete researcher information.

◆ **PI:** ? Help 1 digit
Enter the principal investigator level of the researcher.

◆ **Researcher:** ? Help 9 digits
Type the researcher's identification number taken from researcher files.

◆ **Dept:** ? Help 5 characters
Specify the department code the researcher is associated with.

**SDept:** 5 characters
Include the researcher's sub-department, if applicable.

**Researcher Name:** 30 characters
Displays the researcher's full name, as taken from the researcher file.

**Dept Name:** 4 characters
Shows the name of the department associated with the researcher, as taken from the department code entered.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Limitation of Cost Information

Use Screen 120 to enter the limitation of the cost, amount, and days of a project. “Limitation of Cost” is when the sponsor wants to know in advance (usually 30 days) when the project gets to a certain percentage of cost - example, 75% of cost. Private sponsors often use this function.

**Screen 120 - Project Limitation of Cost**

```
120 Project Limitation of Cost                                  02/13/09 15:47
                                                                 FY 2009 CC 99
Screen: ___ Project: 4724310000   REVIEW OF 'AMERICANS WITH DISABILITIES

               Flag: Y
            Percent: __
             Amount: _______________
               Days: ___
            Comment: 30 DAYS__________________________________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Include additional data in the fields available and press <ENTER> to record the data.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number.

### *Screen Information*

**Flag:** ? Help 1 character
Enter “Y” to indicate that there is a limitation of cost associated with this project. Leave this field blank if not applicable or unknown.

**Percent:** PF2 Help 2 digits
Include the percent of the project for the limitation of cost.

**Amount:** PF2 Help 14 digits
Enter the amount the project is limited to.

**Days:** 3 digits
Indicate the number of days before the end of the contract to notify the sponsor if limitation has been reached.

**Comment:** 40 characters
Enter any comments to help identify the limitations of cost for the project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Project Compliance Codes

Screen 121 allows you to enter and maintain codes, indicating compliance with various regulations for a project. Use this screen to enter the type of project and other comments as desired.

**Screen 121 - Project Compliance Codes**

```
  121 Project Compliance Codes                                    02/13/09 15:49
                                                                   FY 2009 CC 99
  Screen: ___  Project: 4361010000  EFFECT OF DIETARY FAT SOURCE ON

    F  Committee            Committee                          Type
Typ S     Date               Comment                          Comment

 AS _ __________ HAS FORMS ON DISK - MKB_________________ RATS_______________
 RD _ __________ NEEDS FORMS_____________________________ ____________________
 RD _ __________ 7/2/96: SENT FOLLOWUP MEMO TO BH. DJH___ ____________________
 RD _ __________ PI HAS FORMS PER DH MEMO - BH - 7/2/96__ ____________________
 AS Y __________ RECEIVED FORM/SENT FOR APPROVAL - BH____ 7/8/96______________
 RD Y __________ RECEIVED FORM/SENT FOR APPROVAL - BH____ 7/8/96______________
 AS _ __________ PER TRACY/LARR - SENT MEMO ASKING JIANG_ ____________________
 AS _ __________   TO MODIFY FORM -- TO DATE HAS HAD NO__ ____________________
 AS _ __________   RESPONSE - BH_- 7/26/96_______________ ____________________
 RD _ 09/07/1996 APPROVED 9/7/96--KDM____________________ ____________________
 __ _ __________ _______________________________________ ____________________
 __ _ __________ _______________________________________ ____________________
 __ _ __________ _______________________________________ ____________________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Include compliance data in the fields available and press <ENTER> to record the data.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for award information you are adding/modifying.

### *Screen Information*

**Typ:** ? Help 2 characters
Indicate the type of subjects and/or substances to be used in the research.

**FS:** 1 digit
Indicate if the form status is complete, or leave blank.

**Committee Date:** 8 digits
Enter the date of a committee action.

**Committee Comment:** 40 characters
Include the committee's comments on action taken, decision made, etc.

**Type Comment:** 20 characters
Enter additional comments about the type of research.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according the information on Screen 821.

# NSF and THECB Codes

FAMIS allows you to enter and maintain codes that facilitate reports to the National Science Foundation (NSF) and The Coordinating Board (THECB). Screen 122 allows you to make modifications to your report.

**Screen 122 - Project NSF and THECB Codes**

```
  122 Project NSF and THECB Codes                                  02/13/09 15:50
                                                                    FY 2009 CC 99
  Screen: ___ Project: 4436710000  (URI) EXPLORING THE INTERFACE OF URBAN D

 National Science Foundation & Texas Higher Education Coordinating Board Codes

                          Activity: 1A_
     Science and Engineering Field: 2A3   NSF Category: NSF_____
         Special Areas of Interest: ___
                 Character of Work: 4A_
                 Selection Process: 5A_

 Addtn'l Special Areas of Interest: ___  ___  ___  ___  ___  ___  ___
                                    ___  ___  ___  ___  ___  ___  ___

Federal Demonstration Project: Y

Other Related Projects
       __________   __________   __________   __________   __________
       __________   __________   __________   __________   __________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**NOTE**: The ***Activity***, ***Science and Engineering Field***, ***Character of Work***, and ***Selection Process*** fields are required at the project level, but not to the proposal. If any of the four THECB fields (***Activity***, ***Science/Engineering Field***, ***Character of Work***, or ***Selection Process***) are filled in, then the other 3 fields must also be filled in. This information is displayed on FRS Screen 9.

## Determination of NSF Category

The ***NSF Category*** field will be filled in automatically from the CFDA code table when:

1) The ***NSF Category*** field has not been changed by the person entering information on the screen. This includes blanking out the field.
2) The Sponsor has a ***Sponsor Type*** of "F" (Federal) or the ***Fed Flow Sponsor*** field is filled in (Screen 111).
3) If the ***CFDA Code*** is filled in, the CFDA Code will be checked at the Agency level to see if a default category exists.

   For example, programs with a CFDA Code of 10.xxx are associated with the USDA. Therefore, CFDA Code 10.000 will have a default NSF Category of USDA. When a code such as "10.058" is entered on Screen 11 or Screen 111, the CFDA code "10.000" will be checked and the ***NSF Category*** will be filled in with "USDA."

If the CFDA Code (on the Table) does not have a default category, the Sponsor will be checked to see if it is a ***Sponsor Type*** "F". If it is, the classification information for the sponsor will be checked to see if one of the NSF category levels exists. If so, the ***NSF Category*** will be filled in with that category. Otherwise, "OTHER" will be entered in the ***NSF Category*** field.

4) If no CFDA Code is entered, the ***Sponsor*** and ***Fed Flow Sponsor*** fields will be checked as described above.

# Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter project information in the fields provided.
- Press <ENTER> to record the data.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Project:** * Help 10 digits
Enter the project number for the codes being entered and updated.

***Screen Information***

◆ **Activity:** ? Help 3 digits/characters
Indicate the type of research activity for the National Science Foundation and Texas Higher Education Coordinating Board.

◆ **Science and Engineering Field:** ? Help 3 digits/characters
Enter the code, which indicates the science, or engineering impact of the research.

**NSF Category:** ? Help 8 characters
Indicate the category for split-out on the NSF report. This facilitates separating the NSF report into categories for reporting of federal agencies: USDA, DOD, DOE, DHHS (includes NIH), NASA and NSF.

◆ **Special Areas of Interest:** ? Help 3 digits/characters
Enter the area of special interest the project is concerned with as defined by the Coordinating Board.

◆ **Character of Work:** ? Help 3 digits/characters
Include the code for the type of research associated with the project.

◆ **Selection Process:** ? Help 3 digits/characters
Type the code for the selection process by which the research was awarded.

**Addtn'l Special Areas of Interest:** ? Help 3 digits/characters
Enter up to 14 additional areas of special interest the project is concerned with.

| | |
|---|---|
| **Federal Demonstration Project:** | **? Help** 1 character<br>Enter "Y" if this is a Federal Demonstration Project. |
| **Other Related Projects:** | **PF2 Help** 10 digits<br>Include up to 10 additional project numbers related to this project. They may or may not be Federal Demonstration projects. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Project Comments

You will be able to include comments about the project by using Screen 123. These comments are freeform and can be used for historical information. However, the **comments do not print**, and are only used as a resource of additional information about the project.

> There is no word wrap feature when entering text. To avoid splitting a word between two lines, use the TAB key to advance to the next available text line.

**Screen 123 - Project Comments**

```
  123 Project Comments                                          02/13/09 15:52
                                                                 FY 2009 CC 99
  Screen: ___ Project: 4724310000   REVIEW OF 'AMERICANS WITH DISABILITIES
                                          Position at line: 1__ of   3

 Line  Project Notes
  1    OBLIGATED THROUGH 1/14/97 $145,726.00_____________________________
  2    TO BE OBLIGATED $37.047___________________________________________
  3    TOTAL PROJECT $182,773____________________________________________



Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next        Bkwd  Frwd
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>. Use the search feature if the project number is not known by typing an asterisk (*), part of the name, or part of the project number and pressing <ENTER>.
- Enter comments about the project in the space provided and press <ENTER> to record the data.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number requiring additional comments.

**Position at line __ of __** 3 digits
Type a line number in this field to position a specific line number at the top of the display.

> Comments can be added in spaces provided. The comment entry is not tagged with audit information such as time, date and person entering.

**Line:** 2 digits
Displays the line number for the project notes displayed.

**Project Notes:** 55 characters
Include notes about the project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Project Activity Log

Notes of project activity are kept in chronological order on Screen 124. This provides a history of activity on the project. Each time an update is made, you must enter the date. However, the ***User ID*** will automatically be filled in by the system.

> There is no word wrap feature when entering text. To avoid splitting a word between two lines, use the TAB key to advance to the next available text line.

**Screen 124 - Project Note Log**

```
  124 Project Note Log                                          02/13/09 15:59
                                                                 FY 2009 CC 99
  Screen: ___ Project: 4724310000   REVIEW OF 'AMERICANS WITH DISABILITIES
                                              Position at line: 1_ of 13

 Ln     Date                          Comment                          Userid
 1   02/08/1995  M500119 03 RELEASE OF FUNDS $52,602_________________
 2   06/20/1994  M406759 02 RELEASE OF FUNDS $28,871_________________
 3   05/10/1994  M406743 01 94-108 RFP $182,773._____________________
 4   02/25/1998  CLOSING STARTED_____________________________________  HxxxxxP
 5   02/25/1998  CLOSE-OUT DOCUMENTS FORWARDED TO ACCTG MGMT/J PORCH_  WxxxxxP
 6   03/02/1998  CLOSEOUT FORWARDED TO HANNA HARRISON _______________  PxxxxxP
 7   03/16/1998  CLOSEOUT FORWARDED TO MELINDA MARTIN________________  WxxxxxP
 8   03/16/1998  C/O FORWARED TO TREASURY____________________________  PxxxxxP
 9   03/16/1998  TREASURY HOLDING, INV#R004804 FOR $164.24 OUTSTANDIN  SxxxxxP
 10  __________  ALSO SCREEN 019 OUT OF BALANCE______________________  SxxxxxP
 11  03/18/1998  FRS 019 CORRECTED___________________________________  SxxxxxP
 12  04/09/1998  PAYMENT REC'D, TREASURY SIGNED AND FORWARDED TO RA__  SxxxxxP
 13  04/13/1998  CLOSEOUT COMPLETED__________________________________  HxxxxxP
     __________  ________________________________________________
     __________  ________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next        Bkwd  Frwd
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Include the ***Date*** and ***Comments*** in the available fields and press <ENTER> to record the project notes.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for which notes are being made.

**Position at line __ of __** 3 digits
Type a line number in this field to position a specific line number at the top of the display.

### *Screen Information*

**Ln:** 2 digits
Displays the line number for the information displayed.

**Date:** 8 digits
Type the date you are entering the comment.

**Comment:** 55 characters
Include comments about the project. **There is no word wrap feature when entering the text.**

**User ID:** 8 characters
Displays the identification number of the person entering the comment. This is automatically assigned by the system.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Project Keywords

FAMIS allows you to set up keywords that can be used for project information. When you enter standard keywords for your projects on Screen 125, you can then use Screen 145 to find related projects. It is suggested that you define and use a set of standard words to use in order to ensure the best search results.

**Keywords must be set up on Screen 809.**

**Screen 125 - Project Keywords**

```
  125 Project Keywords                                          02/13/09 16:02
                                                                 FY 2009 CC 02
  Screen: ___ Project: 0000000933  NTIA/PTFP GRANT 90206

Keywords: KAMU___________   ______________   ______________   ______________
          ______________    ______________   ______________   ______________
          ______________    ______________   ______________   ______________

Roll-up Group: _____  _____  _____  _____  _____  _____
               _____  _____  _____  _____  _____  _____

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter ***Keywords*** for the project in the fields provided and press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be associated with specific keywords to be entered.

### *Screen Information*

**Keywords:** Help 15 characters/12 lines
Enter the keyword(s) for the search. **Screen 809 must be set up.**

**Roll-Up Group:** 5 characters/12 lines
This field is not used by FAMIS at this time.

## ***Additional Functions***

| | |
|---|---|
| **PF Keys:** | See the Appendix for explanation of the standard PF keys. |
| **PF5** | **Next** |
| **Next** | Goes to the next screen that follows according to information shown on Screen 821. |

# Display Project Contact Information

Screen 128 provides a list of contacts for a project. This screen shows the contact type, name, title and phone number. You may select a contact on this screen and advance to Screen 129 to view more details about the contact.

**Contact information displayed on this screen is entered on Screen 129.**

**Screen 128 - Project Contact Information**

```
128 Project Contact Information                                  02/13/09 16:04
                                                                  FY 2009 CC 02
Screen: ___ Project: 0000001031  DOCTORIAL TRAINING-HISPANIC CHILD

       Sponsor: 0000203
                U. S. DEPARTMENT OF EDUCATION

                          * ----- Contacts ----- *
Sel  Type      Name                      Title                  Phone     Ext.
 _    A     RANDY ROBBINS              EDUCATION PROGRAM ST
 _    A     CARLA CARSON               EDUCATION GRANTS STA  202-222-2222
 _    F     DEPARTMENT OF EDUCATION    FINANCIAL MANAGEMENT  202-444-3333






                *** End of list ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- If the project number is not known, type an asterisk (*), part of the project number, or part of the project name in this field, and press <ENTER> to view a list of available projects.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** *** Help** 10 digits
Enter the project number for the contact information to be displayed.

### *Screen Information*

**Sponsor:** **PF2 Help** 7 digits/30 characters
Shows the seven-digit ID number and name of the sponsor associated with the project.

**Sel:** 1 character
Type an "X" to select a contact and press <ENTER> to proceed to Screen 129 where detailed project contact information is displayed.

**Type:** 1 character
Indicates level or position type of the contact. For example, administrative, financial or technical, etc. as entered on Screen 129.

**Name:** 35 characters
Shows the name of the contact that was entered on Screen 129.

**Title:** 20 characters
Identifies the contact's position title, provided on Screen 129.

**Phone:** 10 characters
Displays the contact's phone number entered on Screen 129.

**Ext:** 4 characters
Provides the contact's phone extension number, if available.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Add/Modify Project Contact Information

Contact information for a project are entered, modified and deleted on Screen 129. Contacts added on this screen are displayed on Screen 128.

**Screen 129 - Project Contact Maintenance**

```
   129 Project Contact Maintenance                                  02/13/09 16:10
                                                                     FY 2009 CC 02
   Screen: ___ Project: 0000001021  Contact Type: A_
                        IMPROVEMENT OF ELEM SCHOOL SCIE TEACHING


       Sponsor: 0000203  U. S. DEPARTMENT OF EDUCATION


   Contact Number: 1                          Delete this Contact: _ (Y/N)
             Name: DONNA D DREW_______________
            Title: NEGOTIATOR_________________
          Address: DEPARTMENT OF EDUCATION________
                   GRANTS AND CONTRACTS SERVICE___
                   ________________________________
             City: WASHINGTON___________ State: DC Zip: 20202____
            Phone: 202-777-2222  Ext: ____    Country: US_
              Fax: _____________

               >>> Press PF10 for a list of Project Contacts <<<

 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next                            List
```

To view a list of contacts for the project, press ***PF10***.

**PF10 Key (View sponsor contacts for the project)**

```
+-------------------------------------------------------------+
|                                                             |
|   Screen: ___        ** Contact List **                     |
|                                                             |
| Sel Type Name                      Title                    |
| --- ---- ------------------------- ------------------------- |
|  _   A   JILL JONES                EDUCATION PROGRAM STAFF  |
|  _   A   RITA RAYNES               EDUCATION GRANTS STAFF   |
|  _   F   DEPARTMENT OF EDUCATION   FINANCIAL MANAGEMENT SERV |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                                                             |
|                  ** 3 Contacts displayed **                 |
+-------------------------------------------------------------+
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Use the fields provided to add or modify the contact information.
- Press <ENTER> to record the data.
- To delete a contact, type "Y" in the ***Delete this Contact*** field.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the contact information you are adding or updating.

**Contact Type:** ? Help 2 characters
Indicate the level or position type of the contact person; i.e., administrative, financial or technical, etc.

## *Screen Information*

**Sponsor:** 7 digits
Displays the ID number and name of the sponsor associated with the project.

**Contact Number:** 2 digits
Indicates the number that was assigned when the contact person was entered.

**Delete this Contact:** 1 character
Type "Y" if this contact information should be deleted.

**Name:** 25 characters
Enter the name of the project contact person.

**Title:** 25 characters
Indicate the contact person's position title.

**Address:** 3 lines/30 characters
Enter the contact person's address.

**City:** 20 characters
Enter the city address for the contact person.

**State:** ? Help 2 characters
Identify the contact's State address.

**Zip:** 9 digits
Provide the ZIP code for the contact person's address.

**Phone:** 10 digits
Enter the contact person's phone number in this field. The valid sequence is xxx-xxx-xxxx.

**Ext:** 4 digits
Indicate the phone extension number of the contact person's phone number, if applicable.

**Country:** ? Help 3 characters
Enter the country location of the contact person.

**FAX:** 12 digits
Type the contact person's FAX number.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

**PF10** **Contact List**
**List** Displays the contacts for the project.

# Delete Project

FAMIS allows you to delete a project from the SPR module with the use of Screen 190. A pop-up window will be displayed to confirm the deletion.

**If awards exist on the project, it cannot be deleted.**

**Screen 190 - Project Delete**

```
S6301 Awards exist for this Project - Cannot Delete
 190 Project Delete                                          02/13/09 16:24
                                                              FY 2009 CC 02
 Screen: ___ Project: 0000003096

             Enter 'Y' to Delete: _

      Title: S/G INDUSTRIAL - ROSATI
 Long Title: S/G INDUSTRIAL - ROSATI

    Sponsor: 0001038          Last Award:   1    Total Awards:       27953.00
Sponsor Name: NATIONAL OCEANIC AND ATMOSPHERIC ADMIN.
Award Number: NA56RG0388
               Status: A
      Previous Project:                            Begin Date: 07/01/1997
        Parent Project:                              End Date: 06/30/1998
          Project Type: S
       Instrument Type: G
   Instrument Sub-Type: OTHR
          Funding Type: R
              Function: 15

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- If there are no awards for the project, type "Y" in the ***Enter 'Y' to Delete*** field and press <ENTER> to delete the project.
- Enter "Y" in the pop-up window to confirm the project deletion and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be deleted.

**Enter 'Y' to Delete:** 1 character
Type "Y" to delete the project. A pop-up window will appear to allow you to confirm the deletion of the project.

### *Screen Information*

**Title:** PF2 Help 40 characters/digits
Displays the project title.

**Long Title:** PF2 Help 130 characters
Shows the complete title of the project.

**Sponsor:** PF2 Help 7 digits
Displays the sponsor's identification number.

**Last Award:** PF2 Help 2 digits
Indicates the number assigned to the last award made to the project.

**Total Awards:** PF2 Help 20 digits
Shows the total dollar amount awarded to this project.

**Sponsor Name:** PF2 Help 50 characters
Displays the sponsor's name.

**Award Number:** PF2 Help 20 digits/characters
Provides the award number.

**Status:** PF2 Help 1 character
Shows the status of the project.

**Previous Project** PF2 Help 15 digits
Provides the previous project number, if any.

**Begin Date:** PF2 Help 8 digits
Shows the start date for the project.

**Parent Project:** PF2 Help 15 characters
Indicates the parent project, if applicable.

**End Date:** PF2 Help 8 digits
Provides the estimated completion date for the project.

**Project Type:** PF2 Help 1 character
Indicates the type of project; single, parent or child.

**Instrument Type:** PF2 Help 1 character
Identifies the project's instrument type.

**Instrument Sub-Type:** PF2 Help 5 characters
Displays the category of the type of instrument.

**Funding Type:** PF2 Help 1 character
Identifies the funding type chosen for the project.

**Function:** PF2 Help 2 characters/digits
Shows the function chosen for the project.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Delete Award

An award can be deleted using Screen 191. A pop-up window will be displayed to confirm the deletion.

The award amount and the amount reported **must be zero** to delete an award.

**Screen 191 - Award Delete**

```
S6293 Award Amt and Amt Reported must be zero to delete Award
 191 Award Delete                                          02/13/09 16:27
                                                            FY 2009 CC 02
 Screen: ___ Project: 0000404142 Award Nbr: 001

             Enter 'Y' to Delete: _

      Title: A NANOSCALE MICROFLUIDIC SAMPLER:
 Long Title: A NANOSCALE MICROFLUIDIC SAMPLER: APPLICATIONS IN ENVIRONMENTAL
             AGRICULTURAL SAMPLING OF E. COLI
    Sponsor: 0000245
Sponsor Name: SEA GRANT - NOAA
 Sponsor Awd: NA06OAR4170076


 Last Award: 001
Award Amount:       10000.00              Total Awards:       10000.00

 Begin Date: 04/01/2008
   End Date: 10/31/2009


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Enter the project number to be deleted in the ***Project*** field and press <ENTER>.
- Verify that the award amount and amount reported are zero, then type "Y" in the ***Enter 'Y' to Delete*** field and press <ENTER>.
- Type "Y" in the pop-up window to confirm the deletion of the award.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number of the award information being deleted.

◆ **Award Nbr:** 3 digits
Type the award number to be deleted.

◆ **Enter 'Y' to Delete:** 1 character
Enter "Y" to delete the award. A pop-up window will appear to allow you to confirm the deletion.

### *Screen Information*

**Title:** PF2 Help 40 characters
Displays the title of the project.

**Long Title:** PF2 Help 130 characters
Shows the long title for the project.

**Sponsor:** PF2 Help 7 digits
Displays the sponsor's identification number.

**Sponsor Name:** PF2 Help 50 characters
Identifies the name of the project's sponsor.

**Sponsor Awd:** PF2 Help 20 characters/digits
Shows the project number assigned by sponsor.

**Last Award:** PF2 Help 3 digits
Displays the number assigned to the last award associated with the project.

**Award Amount:** 12 digits
Provides the total dollar amount of the award to be deleted.
Must bring the award amount to zero before you can delete.

**Total Awards:** PF2 Help 12 digits
Indicates the total dollar amount awarded to the project.

**Begin Date:** PF2 Help 8 digits
Shows the beginning date of the award.

**End Date:** PF2 Help 8 digits
Displays the date the award ends.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Section V
# Project Inquiry

# Project Inquiry Menu

The following menus show the list of screens that pertain to departmental accounting profiles in FAMIS. On the accounting side (FRS) the menu is M07.

Menu M12 in the SPR module is the SPR Project Inquiry Menu Screen. This menu provides a list of inquiry screens that can be used to view project information.

**Menu M12 – SPR Project Inquiry Menu**

```
M12 SPR Project Inquiry Menu                                    02/13/09 16:28
                                                                 FY 2009 CC 02
Screen: ___
                        Project Inquiry Screens

--- General Project and Award Data ---    ----- Accounting Data ------------
140 Awards for a Project                  150 Project Summary By Budget Pool
141 Project High Level Summary            151 Project Indirect Cost Assessed
142 Projects for a Researcher             152 Account Summary for a Project
143 Project Due/Over Report Tracking      153 Revenue for a Project
144 Parent Project Inquiry                154 Accounts for a Project
145 Project Browse by Keyword             155 User Defined Categories
146 Projects for a Sponsor                156 Project Summ by Target Budget
147 Awards for a Researcher               157 Project Summ by User Category
148 Awards for a Sponsor                  158 Project Summ by Acct/Budget Pool

                                          --- Departmental Planning Budgets --
                                          159 Dept Defined Profile Inquiry
                                          160 Proj Dept Defined Budget Pool
                                          161 Project Summ by Target Budget
                                          162 Project Summ by User Category
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

# Display Awards for a Project

Screen 140 displays all awards for a project. It also displays the total award amount.

**When the *Report* field is blank, the "lock" process has been run and the award information cannot be updated.**

**Screen 140 - Awards for a Project**

```
  140 Awards for a Project                                        02/13/09 16:29
                                                                   FY 2009 CC 02
  Screen: ___ Project: 0000404124  A COASTAL COMMUNTIES PLANNING ATL

   Long Title: COASTAL COMMUNITIES PLANNING ATLAS FOR DECISION MAKERS AND
      Sponsor: SEA GRANT - NOAA
Ttl Award Amt: 172388.00

Sel  Awards       Begin       End        Type         Award Amount      Report
---  ------     ---------- ----------    ----       ----------------    ------
 _     001      05/01/2008 08/31/2008     B                 9617.00
 _     002      02/01/2008 01/31/2009     B                 9617.00-
 _     003      02/01/2008 01/31/2009     C                96048.00
 _     004      02/01/2008 01/31/2010     C                76340.00       Y




 Total Award Amount:      172388.00  Screen Amount:      172388.00
                     *** End of Award list ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Select an award by typing an "X" in the ***Sel*** (Select) field next to the desired award, and press <ENTER>. You will advance to Screen 113 (Award Information Maintenance), where detailed award information is provided.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

### *Screen Information*

**Long Title:** 50 characters
Shows the complete title of the project.

**Sponsor:** 50 characters
Displays the name of the sponsor associated with the project.

**Ttl Award Amount:** 12 digits
Indicates the total amount of all awards on this project on Screen 113.

**Sel:** 1 character
Type an "X" to select an award and view additional information on Screen 113.

**Awards:** 3 digits
Shows the number assigned to the award.

**Begin:** 8 digits
Displays the date the award is to begin.

**End:** 8 digits
Indicates the date the award is to end.

**Type:** **PF2 Help** 1 character
Shows the type of action or reason for the change or addition.

**Award Amount:** 15 characters
Indicates the amount of money awarded to the project.

**Report:** 1 character
"Y" indicates the award information needs to be reported as part of the month end process. **If "Y," the award information has not been locked and can be updated.**

**When blank, the "lock" process has been run and the award information cannot be updated.**

**Total Award Amount:** 15 characters
Displays the total dollar amount awarded for this project.

**Screen Amount:** 15 characters
Indicates the total amount of money listed on this screen for this project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Display High Level Summary for a Project

FAMIS provides a high level summary for a project on Screen 141. This screen is used to view the current project data.

**Screen 141 - Project High Level Summary**

```
  141 Project High Level Summary                                  02/13/09 16:31
                                                                   FY 2009 CC 02
  Screen: ___ Project: 0000404142

  Title: A NANOSCALE MICROFLUIDIC SAMPLER: APPLICATIONS IN ENVIRONMENTAL
         AGRICULTURAL SAMPLING OF E. COLI
Sponsor: SEA GRANT - NOAA

        Status: A        Begin Date: 04/01/2008     End Date: 10/31/2009
 Number Awards: 1     Total-Awarded: 10000.00
     Bill Type:           Bill Mode: N              Bill Freq:
      Ind-Freq: M

         Researcher     Dept                     Name
         ---------      -----       ----------------------------------------
         6uuuuuuu9      OCNG        BROWN ,BERTHA B
         8uuuuuuu7      CLGE        STONE ,STEVEN S


              ** End of list - 2 Researcher(s) found **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Press ***PF5*** to advance to the next screen which shows additional information about the project.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

### *Screen Information*

**Title:** ? Help 50 characters
Shows the title of the project.

**Sponsor:** ? Help 50 characters
Indicates the name of the sponsor associated with the project.

**Status:** 1 character
Shows the status of the project.

**Begin Date:** 8 digits
Identifies the date the project is to begin.

**End Date:** 8 digits
Displays the date the project is to end.

**Number Awards:** ? Help 3 digits
Indicates the number of awards for the project.

**Total-Awarded:** ? Help 15 digits
Shows the total dollar amount of all awards made to the project.

**Bill Type:** 1 character
Shows the type of billing used for the project.

**Bill Mode:** 1 character
Provides the method of billing used.

**Bill Freq:** 1 character
Displays the frequency of billing that was selected for the project.

**Ind-Freq:** 1 character
Indicates the frequency with which the indirect cost is calculated.

**Researcher:** 9 digits
Displays the personal ID of the researcher responsible for the project.

**Dept:** 4 characters
Identifies the researcher's department associated with the project.

**Name:** 50 characters
Shows the full name of the researcher responsible for the project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Display Projects for a Researcher

To view all projects related to a researcher, use Screen 142. There are two panels of information associated with this screen. There is also an option available to view the support accounts for the project.

**Screen 119 must be filled in to view data on Screen 142.**

### Screen 142 - Projects for a Researcher (Panel 1)

```
  142 Projects for a Researcher                                   02/13/09 16:33
                                                                   FY 2009 CC 02
  Screen: ___ Researcher: 8uuuuuuu7  STONE ,STEVEN S
              Support Acct Display: Y
                                                              Panel: 01 More >>
Sl Project ID Project Title                Sponsor Name             Acct  SAcct
-- ---------- ---------------------------- ----------------------- ------ -----
 _ 0000000118 SEA GRANT PUBLICATIONS       VARIOUS PRIVATE SPONSOR 553051 00000
                                                                   553051 10000
 _ 0000002619 SEA GRANT-RAPID RESPONSE-(95 SEA GRANT - NOAA
 _ 0000002903 SEA GRANT ADMINISTRATION SUP STATE OF TEXAS - STATE  153011 00000
                                                                   153011 04524
 _ 0000002904 SEA GRANT ADVISORY           STATE OF TEXAS - STATE  153013 00000
                                                                   153013 04352
                                                                   153013 04537
                                                                   153013 21054
                                                                   153013 26038
 _ 0000002905 SEA GRANT INFORMATION SERVIC STATE OF TEXAS - STATE  153014 00000
 _ 0000003295 SEA GRANT RAPID RESPONSE 98- SEA GRANT - NOAA

           *** press ENTER to view more Projects ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                          Left  Right
```

### Screen 142 - Projects for a Researcher (Panel 2)

```
  142 Projects for a Researcher                                   02/13/09 16:36
                                                                   FY 2009 CC 02
  Screen: ___ Researcher: 8uuuuuuu7  STONE ,STEVEN S
             Support Acct Display: Y
              << More                                         Panel: 02
Sl Project ID Sponsor Award Number
-- ---------- ----------------------------------------
 _ 0000000118 FAMIS ACCOUNT 553051

 _ 0000002619 NA56RG0388
 _ 0000002903

 _ 0000002904




 _ 0000002905
 _ 0000003295 NA86RG0058

           *** press ENTER to view more Projects ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                          Left  Right
```

# Basic Steps

- Type a researcher identification number in the ***Researcher*** field and press <ENTER>.
- To view the support account information, type "Y" in the ***Support Acct Display*** field.
- Select a project by typing an "X" in the ***Sl*** (Select) field next to the ***Project ID*** and press <ENTER>. This will take you to Screen 111 (Project General Information - Page 1), where detailed project information is provided. Page 2 of the Project General Information is found on Screen 112.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Researcher:** * Help 9 digits/30 characters
Enter the UIN number of the researcher.

**Support Account Display:** 1 character
Type "Y" to display the support accounts.

## *Screen Information*

**Panel 1**

**Sl:** 1 character
Type an "X" to select a project. Advances to Screen 111 to view detail project information.

**Project ID:** PF2 Help 10 digits
Shows the project number assigned.

**Project Title:** PF2 Help 30 characters
Displays the title of the project.

**Sponsor Name:** PF2 Help 20 characters
Shows the name of the person/agency associated with the project.

**Acct:** PF2 Help 6 digits
Displays the subsidiary ledger account number.

**SAcct:** 6 digits
Provides the Support Account number.

**Panel 2**

**Sponsor Award Number:** 40 characters/digits
Shows project number assigned by the sponsor.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Browse Projects by Parent Project

You may view all "child" projects associated with a "parent" project. Parent projects are created to accommodate projects with multiple sponsors. Parent projects are discussed under Screen 111 (Add/Modify Project Information).

Screen 144 displays the sponsor's number, name, number of awards and the total dollar amount funded for the project.

**Screen 144 - Parent Project Inquiry**

```
  144 Parent Project Inquiry                                        02/13/09 16:43
                                                                     FY 2009 CC AB
  Screen: ___ Parent Project: 0000000061  AGREER

                                                          Nbr of
Sel  Project    Sponsor       Sponsor Name                Awards  Total Funded
--- ---------- ------- ---------------------------------- ------ --------------
 _  0000000001 0000081 BROWN FAMILY BENEVOLENT TRUST       001        75,000.00


                              *****  Total  *****          001        75,000.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a number in the ***Parent Project*** field and press <ENTER>.
- Select a project by typing an "X" in the ***Sel*** (Select) field next to the project and press <ENTER>. The user will be taken directly to Screen 111 (Project General Information - Page 1), where detailed project information will be provided. Page 2 of the Project General Information is found on Screen 112.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Parent Project:** * Help 10 digits
Enter the identification number for a specific group of projects to be viewed.

### *Screen Information*

**Sel:** 1 character
Type an "X" to select a specific project and to view additional information on Screen 111.

**Project:** 10 digits
Provides the number assigned to the "child" project.

| | |
|---|---|
| **Sponsor:** | 7 digits<br>Displays the sponsor's number associated with this project. |
| **Sponsor Name:** | 50 characters<br>Identifies the name of the sponsor of the projects. |
| **Nbr of Awards:** | 3 digits<br>Displays the number of awards associated with the "child" projects. |
| **Total Funded:** | 14 digits<br>Shows the total dollar amount of awards made to the child projects. |
| **Total:** | 14 digits<br>Shows the total dollar amount awarded to the parent project. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Browse Projects by Keyword

Screen 145 is used to find a project by using a keyword. You may enter a complete or partial keyword to view a listing with all projects that use the keyword entered.

**Matching keywords must have been previously entered using Screen 125.**

**Screen 145 - Project Browse By Keyword**

```
  145 Project Browse By Keyword                                  02/13/09 16:44
                                                                  FY 2009 CC 02
  Screen: ___ Keyword: KAMU__________

Sel Project    Keyword         Sponsor Sponsor Name
--- ---------- --------------  ------- ----------------------------------------
 _  0000000933 KAMU            0000240 DOC



                   *** End of Project List ***

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp        Next
```

## Basic Steps

- Type a word or portion of a word in the ***Keyword*** field and press <ENTER>.
- Select a project by typing an "X" in the ***Sel*** (Select) field next to the project and press <ENTER>. You will advance to Screen 111 (Project General Information - Page 1), where detailed project information will be provided. Page 2 of the Project General Information is found on Screen 112.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Keyword:** 15 characters
Enter a keyword associated with the name of the project, or a portion of the name, to be used to search for the project. The word must have been previously entered on Screen 125.

### *Screen Information*

**Sel:** 1 character
Type an "X" to select a specific project and to view additional information on Screen 111.

**Project:** PF2 Help 10 digits
Displays the number assigned to the project.

**Keyword:** 14 characters
Provides the project keyword identified by the search word used.

**Sponsor:** PF2 Help 7 digits
Displays the number of the sponsor associated with the project by viewing this field.

**Sponsor Name:** PF2 Help 50 characters
Shows the sponsor's name.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Display Projects for a Sponsor

A list of all projects for a specific sponsor is found on Screen 146. This screen shows the project number, short title, awards, and total dollars awarded for a sponsor.

After selecting a project, you will be advanced to Screen 111 and can view additional information about the project.

**Screen 146 - Projects for a Sponsor**

```
  146 Projects for a Sponsor                                        02/13/09 16:47
                                                                     FY 2009 CC 02
  Screen: ___ Sponsor: 0000120  BRAZOS COUNTY

Sel  Project          Short Title              Awards Total Awarded    End Dt
--- ----------  ------------------------------  ---  --------------  ----------
 _  0000001231  RESERVE FOR AIRPORT EXPANSION-  001      300000.00   08/31/1999
 _  0000002671  BCCSCD-ADULT PROBATIONERS-4500  006                  08/31/2005
 _  0000002679  BRAZOS COUNTY - JUVENILE SERVI  002       18844.48   08/31/1997
 _  0000002680  BRAZOS COUNTY - SHELTERING ARM  002       18244.48   08/31/1997
 _  0000002937  BCCSC-ADULT PROBATION           001        4000.00   08/31/1997
 _  0000002940  BCCSC-SUBSTANCE ABUSE & RELATE  001       37278.08   08/31/1997
 _  0000450112  BCCSCD-EVALUATION OF SPECIALTY  001       35000.00   08/31/2004
 _  0000450114  BCCSCD-EVALUATION OF BRAZOS CO  001       30000.00   07/31/2005
 _  0000450121  CWS-BRAZOS COUNTY*TCR*          001                  08/31/2010



   Total Awards Amount:     443367.04  Screen Total:     443367.04
                    ** END OF LIST- 9 PROJECT(S) FOUND **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a sponsor number in the ***Sponsor*** field and press <ENTER> to display projects for the sponsor.
- Select a project by typing an "X" in the ***Sel*** (Select) field next to a project, and press <ENTER>. You will advance to Screen 111 to view detailed project information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Sponsor:** * Help 10 digits
Enter the sponsor's number to view project information associated with a particular sponsor.

### *Screen Information*

**Sel:** 1 character
Type an "X" to select a specific project and view additional information. This takes you to Screen 111.

**Project:** PF2 Help 10 digits
Shows the project number.

**Short Title:** PF2 Help 30 characters
Displays a short title for the project.

**Awards:** 3 digits
Indicates the number of awards made to the project.

**Total Awarded:** 14 characters
Shows the total dollar amount of the award.

**End Dt:** 8 digits
Shows the end date of the project.

**Total Awards Amount:** 13 digits
Indicates the total dollar amount of all awards associated with the sponsor.

**Screen Total:** 13 digits
Displays the total dollar amount of awards listed on the screen.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Display Awards for a Researcher

FAMIS provides a list of all awards for a researcher on Screen 147. There are two panels of information available.

**Screen 113 (Add/Modify Award Information) must be filled in to have data displayed on Screen 147.**

### Screen 147 - Awards for a Researcher (Panel 1)

```
147 Awards for a Researcher                                          02/13/09 16:49
                                                                      FY 2009 CC 02
Screen: ___ Researcher: 8uuuuuuu7  STONE, STEVEN S
                                                                 Panel: 01 More >>
 Project  Award Beg Date     Amount     Dept  Sponsor Name
---------- ----- -------- ------------- ----- ----------------------------
0000000118  001  04/03/70                SEAG  VARIOUS PRIVATE SPONSORS
0000002619  029  05/01/98      59560.00  SEAG  SEA GRANT - NOAA
            030  10/01/98      14393.00- SEAG  SEA GRANT - NOAA
            031  09/01/98     169769.96- SEAG  SEA GRANT - NOAA
            032  09/01/98    2032041.57- SEAG  SEA GRANT - NOAA
            033  09/01/98     850750.49- SEAG  SEA GRANT - NOAA
            034  09/01/98      67333.28- SEAG  SEA GRANT - NOAA
            035  09/01/98    1011521.00- SEAG  SEA GRANT - NOAA
            036  09/01/95                SEAG  SEA GRANT - NOAA
0000002903  001  05/31/96       1000.00  CLGE  STATE OF TEXAS - STATE APPRO
0000002904  001  08/16/96                CLGE  STATE OF TEXAS - STATE APPRO
0000002905  001  05/01/96       1000.00  CLGE  STATE OF TEXAS - STATE APPRO
        Screen Amount:    4084249.30-
      Total Award Viewed: 4084249.30-
                 *** Press ENTER to view more Projects ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                          Left  Right
```

### Screen 147 - Awards for a Researcher (Panel 2)

```
147 Awards for a Researcher                                          02/13/09 16:50
                                                                      FY 2009 CC 02
Screen: ___ Researcher: 8uuuuuuu7  STONE, STEVEN S
                << More                                          Panel: 02
 Project  Award Sponsor Award Number
---------- ----- ----------------------------------------
0000000118  001  FAMIS ACCOUNT 553051
0000002619  029  NA56RG0388
            030  NA56RG0388
            031  NA56RG0388
            032  NA56RG0388
            033  NA56RG0388
            034  NA56RG0388
            035  NA56RG0388
            036  NA56RG0388
0000002903  001
0000002904  001
0000002905  001
        Screen Amount:    4084249.30-
      Total Award Viewed: 4084249.30-
                 *** Press ENTER to view more Projects ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                          Left  Right
```

## Basic Steps

- Type a researcher identification number in the ***Researcher*** field and press <ENTER> to view the awards for the researcher.
- Press ***PF11*** to see additional information displayed on Panel 2.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Researcher:** * Help 9 digits
Enter the UIN number of the researcher who is assigned to the project.

## *Screen Information*

### → Panel 1

**Project:** 10 digits
Shows the number assigned to the project.

**Award:** 3 digits
Indicates the award number associated with a project.

**Beg Date:** PF2 Help 8 digits
Shows the date the award begins.

**Amount:** 15 digits
Indicates the dollar amount of the award attributed to the researcher selected.

**Dept:** 4 characters
Displays the researcher's department.

**Sponsor Name:** 30 characters
Provides the name of the person/agency associated with the project.

**Screen Amount:** 15 digits
Shows the total dollar amount of the awards shown on the screen.

**Total Award Amount:** 15 digits
Displays the total dollar amount of all awards associated with the researcher selected.

### → Panel 2

**Sponsor Award Number:** 50 characters/digits
Indicates the award number assigned by the sponsor.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Display Awards by Sponsor

Screen 148 displays a list of all awards for a sponsor. There is also an option to display the Support Account.

**Screen 148 - Awards for a Sponsor (Panel 1)**

```
  148 Awards for a Sponsor                                          02/13/09 16:56
                                                                     FY 2009 CC 02
  Screen: ___ Sponsor: 0003702  DREYFUS FOUNDATION, INC.
              Support Acct Display: Y
              Include Only: Active: _ Sponsor Award Nbr: ____________________
                                                                 Panel: 01 More >>
  Project  Award     Amount    Dept     Researcher Name     Account Sup Acct
 --------- ----- ------------- ---- ----------------------- ------- --------
 0000455438 001       8333.33  CHEN  FINN, FRANK F
                      8333.33  CHEN  ROLAND, ROBBY R
                      8333.34  CHEN  MATHERS, MARTIN M
 0000455438 003                CHEN  FINN, FRANK F
                               CHEN  ROLAND, ROBBY R
                               CHEN  MATHERS, MARTIN M
 0000455438 005                CHEN  FINN, FRANK F
 0000455504 001      40000.00  CHEM  GAGE, GARY G            455504   00000
 0000455504 002      10000.00  CHEM  GAGE, GARY G
 0000455504 003                CHEM  GAGE, GARY G
 0000455557 001      50000.00  CHEM  HAINES, HELEN H         455557   00000
 0000455634 001      75000.00  CHEN  UNDERWOOD, URIE U       455634   00000
                *** End of Award List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                           Left  Right
```

**Screen 148 - Awards for a Sponsor (Panel 2)**

```
  148 Awards for a Sponsor                                          02/13/09 16:57
                                                                     FY 2009 CC 02
  Screen: ___ Sponsor: 0003702  DREYFUS FOUNDATION, INC.
              Support Acct Display: Y
              Include Only: Active: _ Sponsor Award Nbr: ____________________
                 << More                                         Panel: 02
  Project  Award Action  Beg Date  Sponsor Award Number
 --------- ----- ------  --------  ----------------------------------------
 0000455438 001     N    06/01/01  AWARD LETTER DATED 3/21/2001


 0000455438 003     X    06/01/04  AWARD LETTER DATED 3/21/2001


 0000455438 005     X    06/01/06  LETTER SIGNED 03/21/01
 0000455504 001     N    01/01/05  TERMS & CONDITIONS SIGNED 10/15/04
 0000455504 002     M    01/01/05  STATEMENT SIGNED 10/15/04
 0000455504 003     E    01/01/05  STATEMENT SIGNED 10/15/04
 0000455557 001     N    09/01/06  LTR DATED 07/21/06
 0000455634 001     N    07/01/08  7/9/08
                *** End of Award List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                           Left  Right
```

## Basic Steps

- Type a sponsor number in the ***Sponsor*** field.
- Type “Y” in the ***Support Acct Display*** field to display the Support Account.
- Include other criteria in the fields provided, as desired, and press <ENTER>.
- Press ***PF11*** to scroll right and view additional information on Panel 2.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Sponsor:** * Help 7 digits
Enter the sponsor's number to be displayed.

**Support Acct Display:** 1 character
Type "Y" to view the support account number.

**Include Only: Active:** 1 character
Enter "Y" to view only active projects.

**Sponsor Award Nbr:** 22 characters/digits
Include the award number to be used to filter the data displayed

## *Screen Information*

### → Panel 1

**Project:** 10 digits
Shows the number assigned to the project.

**Award:** 3 digits
Displays award number assigned to a project.

**Amount:** 15 digits
Indicates the dollar amount for the award.

**Dept:** 4 characters
Shows the researcher's department.

**Researcher Name:** 35 characters
Displays the name of the researcher assigned to the project.

**Account:** PF2 Help 7 digits
Displays the account number for the project.

**Sup Acct:** 8 digits
Shows the support account associated with the account number. (This will only be shown if "Y" was entered in the Support Account Display field).

### → Panel 2

**Action:** 1 character
Designates the reason for the change or addition.

**Beg Date:** 8 digits
Shows the date the award begins.

| | |
|---|---|
| **Sponsor Award Number:** | 50 characters<br>Displays the award number assigned to the project by the sponsor. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Project Summary by Budget Pool

Screen 150 provides a project summary by budget pool. An option is available to display information for either the "Budget Pct Spent" or the "Budget Pct Available." Additional information is available on Panel 2.

**Screen 150 - Project Summary By Budget Pool (Panel 1)**

```
 150 Project Summary By Budget Pool                                  02/13/09 17:05
                        A COASTAL COMMUNTIES PLANNING ATL             FY 2009 CC 02
 Screen: ___  Project: 0000404124  Fiscal Year: 2009  Budget Avail Option: N
           Thru Month: 2_ February    FY/PY/IN to Date: FY  ABR Rule: ___
Sponsor: SEA GRANT - NOAA                 Bottom Line Exclusion:          0.00
Res.Adm: BARRON, BRENDA B                           Net Dir BBA:      73601.12
    Beg: 02/01/08 End: 01/31/10 ABR: 909  Unprotected Available:      73601.12
                                                                       Budget
Obj  Description        Budget      Actual   Encumbrances Available  Pct Spent
---- --------------- ----------- ----------- ----------- ----------- ---------
0001 Revenue Pool
**** Total Revenue

1100 Salaries - Pool      57250       18843        7100       31307     32.91
1700 Wages, etc - Po                    390                     390-
1800 Fringe Benefits      19682        2603         826       16253     13.22
1900 Other Expenses        1781        3920                    2139-   220.10
3000 Travel Pool           8544        1957                    6586     22.91
4000 Supplies and Ma       8903          59                    8844      0.67
5900 Scholarships Po
* Partial Acct Total      96160       27773        7926       60461
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Hmenu Help  EHelp                                       Left  Right
```

**If "N," *Budget Pct Spent* is displayed; if "Y" *Budget Pct Avail* is displayed.**

**Screen 150 - Project Summary By Budget Pool (Panel 2)**

```
 150 Project Summary By Budget Pool                                  02/13/09 17:06
                        A COASTAL COMMUNTIES PLANNING ATL             FY 2009 CC 02
 Screen: ___  Project: 0000404124  Fiscal Year: 2009  Budget Avail Option: N
           Thru Month: 2_ February    FY/PY/IN to Date: FY  ABR Rule: ___
Sponsor: SEA GRANT - NOAA                 Bottom Line Exclusion:          0.00
Res.Adm: BROWN, BRENDA B                            Net Dir BBA:      73601.12
    Beg: 02/01/08 End: 01/31/10 ABR: 909  Unprotected Available:      73601.12

Obj     Budget     CM Actual     Actual    Encumbrances  Available
---- ------------ ----------- ------------ ------------ ------------
0001
****

1100    57250.28                18843.40      7100.00     31306.88
1700                              390.38                    390.38-
1800    19681.68                 2602.65       825.61     16253.42
1900     1781.00                 3920.00                   2139.00-
3000     8543.73       68.00     1957.49                   6586.24
4000     8903.00       23.31       59.46                   8843.54
5900
* Pa         .00         .00         .00          .00          .00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Hmenu Help  EHelp                                       Left  Right
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Use the ***Budget Avail Option*** field to display either the "Budget Pct Spent" or the "Budget Pct Available."
- Designate the month and the time period you wish to view and press <ENTER>.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the costs being researched.

◆ **Fiscal Year:** 4 digits
Enter the fiscal year in which the cost sharing period is covered.

**Budget Avail Option:** 1 character
This field controls the column to be displayed: type "N" to display the ***Budget Pct Available***; type "Y" to display the ***Budget Pct Spent***.

**Thru Month:** 2 digits
Enter the month through which the information is to be displayed.

**FY/PY/IN to Date:** 2 characters
Indicate the time period over which information is to be shown (fiscal year, project year, or inception to date).

**ABR Rule:** ? Help 3 digits
Displays the ABR rule number.

## *Screen Information*

→ **Panel 1**

**Sponsor:** 30 digits/characters
Identifies the sponsor's number and name.

**Bottom Line Exclusion:** 12 digits
Displays the amount of budget excluded from the total direct budget (held in reserve).

**Res.Adm:** 25 characters
Shows name of the research administrator for the project.

**Net Dir BBA:** 12 digits
Identifies the dollar amount of the net direct budget balance available.

**Beg:** 6 digits
Shows the date of the beginning budget year.

**End:** 6 digits
Displays the end date of the budget year.

**Unprotected Available:** 12 digits
Identifies the dollar amount of unprotected budget available.

**Obj:** 4 digits
Indicates the object code used for the posting of the indirect costs.

**Description:** 35 characters
Provides a description of the account.

**Budget:** 20 digits
Designates the original plus revised budget by object code.

**Actual:** 10 digits
Provides the actual dollar amount spent/received on an object code item.

**Encumbrances:** 10 digits
Displays the dollar amount committed for specified object codes

**Available:** 10 digits
Shows the dollar amount available, in relation to the budget, for specified object codes.

**Budget Pct Spent:** 5 digits
Identifies the percentage amount of budget available that has been spent on the project.

→ **Panel 2**

**CM Actual:** 12 digits
Displays the current month revenue activity.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

# Display Project Indirect Cost Information

All indirect costs collected for a project is displayed on Screen 151. You may also select the time period to be displayed.

> Screen 34 in the FRS Module has a flag which permits you to see a projection of indirect costs that will be applied to the account.

**Screen 151 - Project Indirect Cost Assessed**

```
 151 Project Indirect Cost Assessed                                 02/16/09 09:15
                                                                     FY 2009 CC 02
 Screen: ___ Project: 0000404129  S/G-2008-2010-TEXAS SEA GRANT SUPPORT
             Thru Month: 2_  February      FY/PY/IN to Date: FY
                                                                       Total
 Acct  Obj  Account Description         Budget      CM Expensed    Expensed
------ ---- ------------------------ ------------- ------------- -------------
404129 9600 Indirect Cost Budget         18776.33
404129 9610 Indirect Cost - Federal       4774.43                      4774.43









 ** Project Total **                     23550.76           .00       4774.43

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Indicate the month and the time period to be displayed and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number for the costs being researched.

### *Screen Information*

**Thru Month:** 2 digits
Enter the month through which the information is to be displayed.

**FY/PY/IN to Date:** 2 characters
Indicate the time period over which information is to be shown: fiscal year (FY), project year (PY), or inception to date (IN).

**Acct:** 6 digits
Shows the account number to which the project is linked.

| | |
|---|---|
| **Obj:** | 4 digits<br>Indicates the object code used for the posting of the indirect costs. |
| **Account Description:** | 35 characters<br>Displays a description of the account object code used for indirect cost. |
| **Budget:** | 20 digits<br>Designates the original plus revised budget by object code. |
| **CM Expensed:** | 20 digits<br>Identifies the current month indirect cost assessed. |
| **Total Expensed:** | 20 digits<br>Shows the total indirect cost assessed. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Display Account Summary for a Project

In FAMIS, you can view summary information about a project for each account associated with the project. SPR Screen 152 provides a view that parallels the account statement on FRS Screen 19.

**Screen 152 - Account Summary for a Project (Panel 1)**

```
152 Account Summary for a Project                                  02/16/09 09:18
                        S/G 2008-2010 TEXAS SEA GRANT SUPPORT       FY 2009 CC 02
Screen: ___   Project: 0000404138  Account: ______ _____
          Thru Month: 2_ February    FY/PY/IN to Date: FY  Support Acct: N
Account: 404138   1 of   1 Account Desc: S/G UTILITY OF SALT MARSH VEGETATIO
Support:                    Resp Person: ANSON, ARLENE A            ABR: 909
Obj      Description         Budget       Actual    Encumbrances  Available
---- -------------------- ------------ ------------ ------------ ------------
1100 Salaries - Pool             3932                                   3932
**** Total                       3932                                   3932

1700 Wages, etc - Pool            400-                                   400-
1740 Wages - Student              400          400
**** Total                                     400                      400-

1800 Fringe Benefits Pool         392                                    392
1945 Worker's Compensatio           1            1
1950 Unemployment Compens
**** Total                        393            1                      392

                        ** Press ENTER to continue **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                                     Left  Right
```

**Screen 152 - Account Summary for a Project (Panel 2)**

```
152 Account Summary for a Project                                  02/16/09 09:18
                        S/G 2008-2010 TEXAS SEA GRANT SUPPORT       FY 2009 CC 02
Screen: ___   Project: 0000404138  Account: ______ _____
          Thru Month: 2_ February    FY/PY/IN to Date: FY  Support Acct: N
Account: 404138   1 of   1 Account Desc: S/G UTILITY OF SALT MARSH VEGETATIO
Support:                    Resp Person: ANSON, ARLENE A            ABR: 909
Obj        Budget       CM Actual      Actual      Encumbrances   Available
----    ------------ ------------ ------------ ------------ ------------
1100         3932.00                                              3932.00
****         3932.00                                              3932.00

1700          400.00-                                              400.00-
1740          400.00        400.00        400.00
****                        400.00        400.00                   400.00-

1800          392.04                                               392.04
1945             .60           .60           .60
1950             .36           .36           .36
****          393.00           .96           .96                   392.04

                        ** Press ENTER to continue **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                                     Left  Right
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter the desired account number, through month, and identify whether you want the summary for the fiscal year (FY), project year (PY), or from inception (IN).
- Type "Y" in the ***Support Acct*** field if you want to include it in the summary displayed and press <ENTER>.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to view the accounting associated with the project.

**Account:** 11 digits
Include the desired account number to limit the displayed information.

**Thru Month:** 2 digits
Enter the month through which the information is to be listed.

**FY/PY/IN to Date:** 2 characters
Shows the time period over which information is shown (fiscal year, project year, or inception to date).

**Support Account:** 1 character
Enter "Y" to display the support account.

## *Screen Information*

→ **Panel 1**

**Account:** 6 digits
Shows the account number to which the project is linked.

**Account Desc:** 35 characters
Provides a description of the account.

**Support:** 5 digits
If "Y" is entered in the ***Support Account*** field the Support Account number will be displayed.

**Resp Person:** 35 characters
Identifies the responsible person for the account.

**Obj:** 4 digits
Displays the object code for the project.

**Description:** 35 characters
Shows a description of the object code.

**Budget:** 10 digits
Designates the original plus the revised budget by object code.

**Actual:** 10 digits
Provides the actual dollar amount spent/received on an object code item.

**Encumbrances:** 10 digits
Displays the dollar amounts committed for specified object codes.

**Available:** 10 digits
Shows the dollar amounts available, in relation to the budget, for specified object codes.

**Panel 2**

**CM Actual:** 10 digits
Displays the actual dollar amount for the current month.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

# Display Revenue Summary for a Project

Screen 153 is used to view budgeted, current month actuals, and total actual revenues received for a project.

**Screen 153 - Revenue for a Project**

```
 153 Revenue for a Project                                        02/16/09 09:22
                                                                   FY 2009 CC 02
 Screen: ___ Project: 0000425402  NAA-BEN GREGG LIBRARY
             Thru Month: 2_  February      FY/PY/IN to Date: FY
                                                                     Total
 Acct  Obj  Account Description           Budget      CM Actuals    Actuals
------ ---- --------------------------- ------------ ------------ ------------
425402 0001 Revenue Pool                    111447-
425402 0250 Federal Contracts & Grants      897632-        1246-      897632-









    * Project Total                        1009079-        1246-      897632-

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- If desired, enter a through month and indicate whether the information to be displayed is for the fiscal year (FY), project year (PY) or inception to date (IN) and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

### *Screen Information*

◆ **Thru Month:** 2 digits
Enter the month through which the information is to be listed.

**FY/PY/IN to Date:** 2 characters
Identify the time period over which information is to be shown (fiscal year, project year, or inception to date).

**Acct:** 6 digits
Displays the account number where the revenue is posted.

**Obj:** 4 digits
Allows you to view the object code for the revenue.

| | |
|---|---|
| **Account Description:** | 35 characters<br>Provides a description of the object code. |
| **Budget:** | 12 digits<br>Designates the original plus the revised budget by object code. |
| **CM Actuals:** | 12 digits<br>Displays the current month revenue activity. |
| **Total Actuals:** | 12 digits<br>Shows the total actual revenues for the project. |
| **Project Total:** | 12 digits<br>Displays total dollar amount for each column. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Display Accounts for a Project

All the accounts and account information pertaining to a project is displayed on Screen 154. This screen has additional information displayed on Panel 2.

### Screen 154 - Accounts for a Project (Panel 1)

```
  154 Accounts for a Project                                        02/16/09 09:30
                        A COASTAL COMMUNTIES PLANNING ATL            FY 2009 CC 02
  Screen: ___   Project: 0000404124
                Support Acct Display: N

Account  Rate  SAcct Dept  Account Description            Responsible Person
------- ------ ----- ----- ------------------------------ --------------------
 404124  46.50        CLAR  S/G 2008-2010-PLANNING ATLAS-R ROBERTS, RUDY R



                        *** End of Account List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                                       Left  Right
```

### Screen 154 - Accounts for a Project (Panel 2)

```
  154 Accounts for a Project                                        02/16/09 09:31
                        A COASTAL COMMUNTIES PLANNING ATL            FY 2009 CC 02
  Screen: ___   Project: 0000404124
                Support Acct Display: N
                                        Direct         Direct      Alt
Account  Rate  SAcct Dept  ABR    Budget           BBA       CC
------- ------ ----- ----- --- ------------- ------------- --
 404124  46.50        CLAR  909    123795.00      73601.12



                        *** End of Account List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                                       Left  Right
```

## Basic Steps

- Enter a project number in the ***Project*** field and press <ENTER>.
- Type "Y" in the ***Support Account Display*** field to view the support account for the project account.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to view project information.

**Support Acct Display:** 1 character
Type "Y" in the field if you wish to display the support account number associated with the project.

## *Screen Information*

### → Panel 1

**Account:** PF2 Help 7 digits
Displays the account number used for the revenue.

**Rate:** 6 digits
Shows the indirect cost rate.

**SAcct:** 5 digits
Provides the Support Account associated with the account number (Displayed only if Support Account Display is "Y").

**Dept:** PF2 Help 4 characters
Indicates the department to which the account/support account belongs.

**Account Description:** PF2 Help 35 characters
Provides a short description of the account.

**Responsible Person:** PF2 Help 20 characters
Displays the name of the person responsible for maintaining the account.

### → Panel 2

**ABR:** PF2 Help 3 digits
Displays the Automatic Budget Reallocation (ABR) rule number.

**Direct Budget:** 10 digits
Shows the dollar amount of direct budget for the account.

**Direct BBA:** 10 digits
Identifies the dollar amount of direct budget balance available attributed to direct expenses.

**Alt CC:** 2 digits
Identifies the alternate campus code on the project/account.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# User-Defined Budget Allocation Pools

FAMIS uses the Budget Allocation process in categorizing revenues and expenses. The ABR rule on each account identifies the categories for the "accounting records" of the A&M System member. Screen 155 allows you to define your own set of revenue and expense categories.

Often, there are individuals who require that the revenues and expenses be grouped in different categories than the official records. Screen 155, Screen 156, and Screen 157 allow for multiple presentations of project data.

**Screen 155 - User Defined Category Maintenance**

```
155 User Defined Category Maintenance                          02/16/09 09:37
                                                                FY 2009 CC 02
Screen: ___ Project: 0000000753  SEA GRANT SALINITY INTRUSIONS - WARD
                                          Target
 F  Description           Low   High      Budget       Message
 _  REVENUE_____________  0001  0999  ________1000.00
 _  EXPENSES____________  1000  8999  ________5000.00
 _  IDC_________________  9000  9999  _________200.00
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________
 _  ____________________  ____  ____  ______________

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Add or modify the category information displayed and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number.

### *Screen Information*

**F:** 1 character
Type the desired maintenance function: A (Add), U (Update), or D (Delete).

**Description:** 20 characters
Provide a short description of the user-defined category.

**Low:** 4 digits
Enter the starting object code of the range for the category.

**High:** 4 digits
Designate the ending object code of the range for the category.

**Target Budget:** 15 digits
Enter the dollar amount for the target budget for the user-defined category.

**Message:** 20 characters
Displays a message regarding an error detected on a line during processing, if any.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Display Project Summary by Target Budget

FAMIS displays a summary of a project and shows how the current revenue and expenses relate to the target budget entered on Screen 155. Basically, FAMIS gets the revenue and expenses and then reorganizes them into newly defined categories.

**Screen 156 - Project Summary by Target Budget**

```
156 Project Summary by Target Budget                          02/16/09 09:39
                                                               FY 2009 CC 16
Screen: ___ Project: 0000000013  BIOMOLECULAR SCIENCES INTERNS

Sponsor: 0000277  DEPT OF RESEARCH
Begin Date: 05/01/1998    End Date: 08/31/1998
                         Target
      Pool Name          Budget       Actual    Encumbrances   Available
 -------------------- ------------ ------------ ------------ ------------
 NON POOLED REVENUE             0        57500-            0        57500
 NON POOLED EXPENSE             0        67076             0        67076-

 ** TOTAL EXPENSES **           0        67076             0        67076-



Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Press ***PF5*** to advance to Screen 112 to view additional project information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

### *Screen Information*

**Sponsor:** PF2 Help 30 digits/characters
Shows the number and name of the project sponsor.

**Begin Date:** PF2 Help 8 digits
Indicates the date the project begins.

**End Date:** PF2 Help 8 digits
Displays the date the project ends.

**Pool Name:** PF2 Help 20 characters
Shows the pool name from the description field on Screen 155.

**Target Budget:** 12 digits
Displays the target budget entries from Screen 155.

**Actual:** 12 digits
Indicates the actual dollar amount spent/received on the object code item.

**Encumbrances:** 12 digits
Provides dollar amounts committed for specified object codes.

**Available:** 12 digits
Shows dollar amounts available, in relation to the budget, for specified object codes.

**Total Expenses**: 12 digits
Displays the total dollar amount for each column.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen if set up on Screen 821.

# Project Summary by User-Defined Category

FAMIS used Screen 155 to display a summary of the project and shows categories defined by the user. Basically, FAMIS takes the revenues and expenses and then reorganizes them into newly defined categories.

**Screen 157 - Project Summary by User Defined Category**

```
157 Project Summary by User Defined Category                    02/16/09 09:45
                                                                 FY 2009 CC 02
Screen: ___ Project: 0000415099  A RANDOMIZED CONTROL TRIAL TO ASSESS THE

Sponsor: 0000203  U. S. DEPARTMENT OF EDUCATION
Begin Date: 01/01/2009    End Date: 02/28/2009

      Pool Name          Budget       Actual    Encumbrances   Available
 -------------------- ------------ ------------ ------------ ------------
 NON POOLED REVENUE        145005-           0            0       145005-
 NON POOLED EXPENSE        145005         1506         6014       137484

 ** TOTAL EXPENSES **      145005         1506         6014       137484



Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Press ***PF5*** to advance to Screen 112 to view additional information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

### *Screen Information*

**Sponsor:** PF2 Help 7 digits/30 characters
Provides the number and name of the project sponsor.

**Begin Date:** PF2 Help 8 digits
Shows the date the project begins.

**End Date:** PF2 Help 8 digits
Displays the date the project ends.

**Pool Name:** PF2 Help 20 characters
Indicates the name of the pool.

**Budget:** 12 digits
Designates the original plus the revised budget by object code.

**Actual:** 12 digits
Displays the actual dollar amount spent/received on an object code item.

**Encumbrances:** 12 digits
Shows the dollar amounts committed for specified object codes.

**Available:** 12 digits
Gives the dollar amounts available, in relation to the budget, for specified object codes.

**Total Expenses**: 12 digits
Displays the total dollar amount for each column.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen if set up on Screen 821.

# SL/SA Summary for a Project by Budget Pool

Screen 158 is used to view summary information of the subsidiary ledger/support account data for a project by budget pool. Options are provided to view information for a period of time, and whether or not to display the Support Account.

**Screen 158 – SL/SA Summary for a Project by Budget Pool (Panel 1)**

```
158 SL/SA Summary for a Project by Budget Pool                  02/16/09 09:46
                      A RANDOMIZED CONTROL TRIAL TO ASSE         FY 2009 CC 02
Screen: ___   Project: 0000415099  Account: ______ _____
          Thru Month: 2_ February    FY/PY/IN to Date: FY  Support Acct: Y
Account: 415099   1 of   1 Account Desc: ED-BALANCED LEADERSHIP PROGRAM
Support:  00000   1 of   1 Resp Person: ORSON, OLIVIA O            ABR: 909
Obj      Description         Budget       Actual    Encumbrances  Available
---- -------------------- ------------ ------------ ------------ ------------
0001 Revenue Pool              145005-                                145005-
**** Total Revenue             145005-                                145005-

1100 Salaries - Pool            17310         1500         6000         9810
1700 Wages, etc - Pool
1800 Fringe Benefits Pool        8480            4           14         8462
3000 Travel Pool                33000                                   33000
4000 Supplies and Materia        6000                                    6000
1900 Other Expenses - Poo        6000            3                       5997
5900 Scholarships Pool           4496                                    4496
6032 Grants - Student Tui
6401 Subgrants/Subcontrac

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                                     Left  Right
```

**Screen 158 – SL/SA Summary for a Project by Budget Pool (Panel 2)**

```
158 SL/SA Summary for a Project by Budget Pool                  02/16/09 09:48
                      A RANDOMIZED CONTROL TRIAL TO ASSE         FY 2009 CC 02
Screen: ___   Project: 0000415099  Account: ______ _____
          Thru Month: 2_ February    FY/PY/IN to Date: FY  Support Acct: Y
Account: 415099   1 of   1 Account Desc: ED-BALANCED LEADERSHIP PROGRAM
Support:  00000   1 of   1  Resp Person: ORSON, OLIVIA O            ABR: 909
Obj        Budget       CM Actual      Actual      Encumbrances   Available
----    ------------- ------------- ------------- ------------- -------------
0001      145005.00-                                              145005.00-
****      145005.00-                                              145005.00-

1100       17310.00       1500.00       1500.00       6000.00       9810.00
1700
1800        8480.00          3.60          3.60         14.40       8462.00
3000       33000.00                                              33000.00
4000        6000.00                                               6000.00
1900        6000.00                        2.52                   5997.48
5900        4496.00                                               4496.00
6032
6401

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp                                     Left  Right
```

## Basic Steps

- Type a project number in the ***Project*** field, and include an account number if needed.
- Type "Y" in the ***Support Account*** field to display the support account number.
- Fill in the additional fields provided to limit the information displayed and press <ENTER>.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

**Account:** 11 digits
Enter desired account number.

## *Screen Information*

### → Panel 1

**Account:** 6 digits
Shows the account number.

**Account Desc:** 35 characters
Displays a description of the account number.

**Support:** 5 digits
If "Y" is entered the Support Account: number will be displayed.

**Resp Person:** 35 characters
Identifies the responsible person for the account.

**ABR:** 3 digits
Shows the ABR rule for the account.

**Obj:** 4 digits
Displays the object code for the project.

**Description:** 35 characters
Shows a description of the object code.

**Budget:** 10 digits
Designates the original plus the revised budget by object code.

**Actual:** 10 digits
Provides the actual dollar amount spent/received on an object code item.

**Encumbrances:** 10 digits
Displays the dollar amounts committed for object codes.

**Available:** 10 digits
Shows the dollar amounts available, in relation to the budget, for specified object codes.

### → Panel 2

**CM Actual:** 12 digits
Displays the actual dollar amount for the current month.

# Section VI
# Cost Sharing Maintenance

# Cost Sharing Menu

Menu M13 in the SPR module is the Cost Sharing Maintenance and Inquiry Menu. Screens listed in the Cost Sharing Maintenance section are used to modify or create account information.

**Menu M13 – SPR Cost Sharing Menu**

```
M13 SPR Cost Sharing Menu                                        02/16/09 09:50
                                                                  FY 2009 CC 02
Screen: ___

                 --------Cost Sharing Maintenance----------

                 130  Cost Sharing Period Maintenance
                 131  Cost Sharing Req. Account Maintenance
                 132  Cost Sharing Transaction Entry
                 133  Cost Sharing Req. Account Delete
                 134  Cost Sharing Period Delete

                 -------- Cost Sharing Inquiry------------

                 136  Cost Sharing All Period Summary
                 137  Cost Sharing Period Acct. Summary
                 138  Cost Sharing Transaction Detail
                 139  Cost Sharing Requirements by SL


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

# Cost Sharing Basics

Cost Sharing or matching means that a portion of a project or program costs is not borne by the Federal Government or sponsoring agency. Cost sharing is a term typically associated with federal grants, or cooperative agreements, rather than contracts. This relates to the notion that grants and cooperative agreements represent "financial assistance," rather than the acquisition of goods or services for the government.

In order to qualify as cost sharing, the costs in question:

- Must be directly identifiable with the project.
- Must represent costs incurred during the period of performance of the grant or cooperative agreement.

## Mandatory vs. Non-mandatory

Cost Sharing can be "**Mandatory**" (required by statute or program requirements as a condition of award) or "**Voluntary**" (offered by the grantee when not specifically required by the sponsor.

The most common example of mandatory cost sharing occurs with the National Science Foundation's unsolicited grant program. NSF requires that each grantee share in the cost of research projects that result from the submission of unsolicited proposals.

## Qualifying Costs

Cost sharing typically takes the form of either "in kind" contributions or "cash."

**"In kind"** cost sharing may include:

- Salaries
- Associate employee benefits
- Equipment
- Supplies
- Indirect costs associated with these costs

**"Cash"** cost sharing includes:

- Funds contributed from unrestricted institutional sources

  Third party contributions may take the form of either in-kind or cash contributions. The term "third party" refers to an organization other than the prime recipient that is participating in the costs of the project. The most common instance of third party contributions would occur when a university receives a grant with cost sharing requirements and also subcontracts a portion of the project to another university that is also required to make cost sharing contributions.

# Unrecovered Indirect Costs and Cost Sharing

You should make every effort to recover full indirect costs. However, in the event that an agreement includes a mandatory cost sharing requirement and the sponsor is not fully reimbursing the institution's indirect costs, unrecovered indirect costs can serve as another way to meet a mandatory cost sharing requirement.

# Using Cost Share in FAMIS

The Cost Share screens allow you to enter, display and report cost share records. This entry does not post accounting transactions, but are for memo purposes only. The records are useful to indicate the various cost share accounts for one project. This aids in determining that the same dollars are only cost shared one time.

**To use the Cost Share screens, take the following steps:**

1. Add the Cost Share Period on Screen 130.
2. Add the Cost Share Accounts on Screen 131.
3. Enter the Cost Share Transactions on Screen 132.

Once these steps are taken, you can view the Cost Share information for the project on the Cost Share Inquiry screens.

The following pages detail the entry necessary on each of these screens.

# Cost Sharing Period Maintenance

FAMIS allows you to define the cost sharing period, as well as unrecovered indirect cost information for the period. Screen 130 will allow you to add or modify the information regarding the cost sharing period.

> Before entering cost sharing period maintenance modifications, you should first make certain that the ***Mandatory Cost Share*** flag on **Screen 112** is set to "Y"

FAMIS only picks up activity for the current month. To input past lump sum activity, use Screen 132.

**Screen 130 - Cost Sharing Period Maintenance**

```
130 Cost Sharing Period Maintenance                                  02/16/09 09:54
                                                                      FY 2009 CC 02
Screen: ___ Project: 0000003338 Period: 001    Add Period: _


            Begin Date: 09/01/1998
              End date: 03/15/1999    Period Status: T

* ---------- Unrecovered Indirect Cost applied as Cost Sharing -------------- *

        Cost Sharing Required: 632.82________
   Calculated with indirect Rate: 44.00_  Base: MTDC____

* ------------  Total Period Requirements - Display Only  ----------------- *

        Total Cost Sharing Required:          632.82
         Total Cost Sharing Actuals:          632.82
        Total Remaining Requirement:


Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---------PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

To delete, use Screen 133.

This is for the project. See Screen 131 for total required by account.

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter an existing number in the ***Period*** field and press <ENTER>.
- To add a period, type "Y" in the ***Add Period*** field and press <ENTER>. FAMIS will assign a new period.
- Add or modify the cost sharing data in the fields provided and press <ENTER> to record the information.

## Unrecovered Indirect Cost as Cost Share

Some sponsors will not pay the Federal IDC rate and instead negotiate a lower rate for the grant. The difference is the "unrecovered IDC" and can apply as Cost Sharing since it is a cost to the A&M System member.

The amount of unrecovered indirect cost is entered on Screen 130. This sets up the "000000 00000" requirement account for the cost sharing period. The "000000 00000" account can then be seen on Screen 137.

**Screen 137 - Cost Sharing Period Summary**

```
  137 Cost Sharing Period Summary                                  08/28/13 11:13
                                                                    FY 2013 CC 02
  Screen: ___ Project: 0000003338 Period: 001

     Period Begin Date: 09/01/1998      Period Total Required:          632.82
       Period End Date: 03/15/1999        Period Total Actual:          632.82
                                        Period Total Remaining:
   Acct                                      Total        Total       Total
Sel CC   Account     Account Description    Required      Actual    Remaining
-------------------------------------------------------------------------------
 _ 00 000000 00000 UNRECOVERD INDIRECT C      632.82       632.82

                          *** End of List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Project:** * Help 10 digits
Enter the desired project number.

◆ **Period:** 3 digits
This number is automatically assigned by FAMIS to define time period for the cost sharing.

◆ **Add Period:** 1 character
Enter a "Y" to have the system add a time period.

## *Screen Information*

◆ **Begin Date:** 8 digits
Enter the estimated date the cost sharing period will begin.

◆ **End Date:** 8 digits
Include the estimated date the cost sharing period will end.

◆ **Period Status:** 1 character
Indicate whether the period is active (A) or terminated (T).

***Unrecovered Indirect Cost Applied as Cost Sharing***
*(Dollar amount and rate that would have been earned if able to take full amount)*

◆ **Cost Sharing Required:** 14 digits
Enter the cost sharing required for project.

**Calculated with Indirect Rate:** 6 digits
Displays the indirect cost rate (normally calculated by OSP.)

**Base:** ? Help 8 characters
On Screen 801, indirect cost subcode exclusions are entered. **This notifies FAMIS to exclude these subcodes from use in determining the indirect cost amount. These subcodes indicate the direct costs associated with the proposal.**

***Total Period Requirements - Display Only***

**Total Cost Sharing Required:** PF2 Help 12 digits
Displays the total cost sharing required for the project, calculated from the amounts required from each account associated with the project. (**See Screen 131 for total required by account.**)

**Total Cost Sharing Actuals:** PF2 Help 12 digits
Indicates the actual total cost sharing amounts posted to the accounts associated with the project.

**Total Remaining Requirement:** 12 digits
Shows the total cost sharing required minus total cost sharing actuals.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen if set up on Screen 821.

# Cost Sharing Requirement Accounts

FAMIS allows you to define the accounts that will pay the cost share for the period for the project. The cost share account can be an account from another A&M System member. In this case, the account and Account Campus Code are for informational purposes only.

**Before entering Cost Sharing Req. Account modifications, you should first make certain that the Cost Sharing period has been added on Screen 130.**

All accounts for a specific project can be viewed on Screen 154. All accounts for a particular period can be viewed on Screen 137.

**The account number entered in the *Account* field must exist in the FRS Module of FAMIS.**

**Screen 131 - Cost Sharing Req. Account Maintenance**

```
131 Cost Sharing Req. Account Maintenance                    02/16/09 10:11
                                                              FY 2009 CC 99
Screen: ___ Project: 4199210000 Period: 002 Account: 110505 19921 Acct CC: 05


        Period Begin Date: 09/01/1996      Period End Date: 08/31/1998



      Requirement Description: SALARIES_____________________________
               Total Required: 66975.00____






Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field and period number in the ***Period*** field and press <ENTER>.
- Use the fields available for entering the requirement information and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Project:** * Help 10 digits
Enter the project number associated with the specified proposal to be displayed.

◆ **Period:** 3 digits
Identify the time period assigned by FAMIS to define time slots for the cost sharing.

◆ **Account:** 11 digits
Enter the account number assigned to the project.

**Acct CC:** 2 digits
Indicates the account Campus Code. This can be an account from another A&M System member. **Field is for information purposes only**.

## ***Screen Information***

**Period Begin Date:** 8 digits
Displays the date the cost sharing period will begin.

**Period End Date:** 8 digits
Provides the date the cost sharing period will end.

**Requirement Description:** 35 characters
Enter the account description for the last sharing period.

**Total Required:** 12 digits
Indicate the total cost sharing required from a specific account for a specific project.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen if set up on Screen 821.

# Enter Cost Sharing Transactions

FAMIS will allow you to record cost sharing "transactions" on Screen 132. This screen is used to enter the account number, object code, campus code, amount and calendar month of the transaction. You may also enter a lump sum amount for prior year(s) and/or one amount for each month of current year to "catch up" to the current month.

> This screen **does not "post"** financial transactions. It is a "**memo**" entry transaction to record cost share activity and has no financial impact.

**See Screen 137 for uses of Screen 132.**

**Screen 132 - Cost Sharing Transaction Entry**

```
132 Cost Sharing Transaction Entry                                  02/16/09 10:02
                                                                     FY 2009 CC 02
Screen: ___ Project: 0000404124 Period: 001

                Account: ______ _____ ____
    Account Campus CD: __

                  Date: __________
             Reference: _______
                Amount: _______________
          Debit/Credit: _
           Description: ____________________________________
        Calendar Month: __   (e.g. September=09,January=01,Month13=13)
           Fiscal Year: 2009

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**This account must be defined on Screen 131.**

**The Calendar month must be the same as the *Date* field.**

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Enter the account number, account campus code, amount and the calendar month in the fields provided and press <ENTER>.
- Use the fields available to enter additional data needed and press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to display cost sharing transactions to be added or updated.

**Period:** 3 digits
Shows the time period automatically assigned by FAMIS to define time slots for the cost sharing.

## *Screen Information*

- **Account:** 15 digits
  Enter the requirement account number assigned to the project in this field.
  This account must be defined on **Screen 131**.

- **Account Campus Cd:** 2 digits
  Enter the campus code for the account.

**Date:** 8 digits
Indicate the date of the transaction.

**Reference:** 7 characters
Include a reference number for the transaction entry.

- **Amount:** 14 digits
  Enter the dollar amount of the cost sharing transaction entry.

**Debit/Credit:** 1 character
Designate whether the transaction is a debit or credit to the account.

**Description:** 35 characters
Provide a short description of the transaction entry.

- **Calendar Month:** 2 digits
  Enter the month the transaction entry is to be processed.
  The month must be the same as in the ***Date*** field.

**Fiscal Year:** 4 digits
Displays the current fiscal year the project will be developed. This may be changed if necessary.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen if set up on **Screen 821**.

# Delete Cost Sharing Account Requirements

Screen 133 is used to delete an account requirement for a project and period. It is also used to delete "Unrecovered Indirect Cost applied as Cost Sharing" information for the period that is displayed on Screen 130.

**Accounts actual funds must be zero to delete.**

**Screen 133 - Cost Sharing Req. Account Delete**

```
S6277 Accounts actual funds must be zero to delete.
 133 Cost Sharing Req. Account Delete                          02/16/09 10:13
                                                                FY 2009 CC 99
 Screen: ___ Project: 4199210000 Period: 002 Account: 110505 19921 Acct CC: 05


              Total Required Funds:      66,975.00
              Total Actual   Funds:      16,892.56

               Enter 'Y' to Delete: _






Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field, a period in the ***Period*** field and an account number in the ***Account*** field.
- Press <ENTER> to display the cost sharing information.
- To delete the requirement, verify that the total actual funds is zero, then type "Y" in the ***Enter 'Y' to Delete*** and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be displayed.

**Period:** 3 digits
Identify the time period assigned by FAMIS.

◆ **Account:** 11 digits
Enter the account number assigned to the project to be deleted.

**Acct CC:** 2 digits
Displays the account Campus Code.

## ***Screen Information***

| | |
|---|---|
| **Total Required Funds:** | 12 digits<br>Displays the total cost sharing required for account in the period. |
| **Total Actual Funds:** | 12 digits<br>Indicates the total cost-sharing amount that has been posted to the account in the period. Must be zero to delete. |
| **Enter 'Y' to Delete:** | 1 character<br>Enter "Y" in this field to delete the cost sharing account information from the period for the project. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen if set up on Screen 821. |

# Delete Cost Sharing Period

FAMIS allows you to delete the cost sharing information for a specific project and period, using Screen 134.

**If cost share requirements/transactions exist, delete is not allowed.**

**Screen 134 - Cost Sharing Period Delete**

```
S6305 Cost Share Requirements/Transactions exist - no Delete allowed
 134 Cost Sharing Period Delete                                  02/16/09 10:08
                                                                  FY 2009 CC 99
 Screen: ___ Project: 4199210000 Period: 002



              Enter 'Y' to Delete: _





Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number in the ***Project*** field, enter the period in the ***Period*** field, and press <ENTER>.
- If cost share requirements/transactions exist, a warning message will be displayed at the top of the screen and the delete will not be allowed.
- If the delete is allowed, type "Y" in the ***Enter 'Y' to Delete*** field and press <ENTER>.
- Press ***PF5*** to advance to Screen 112 to view additional project information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Project:** * Help 10 digits
Enter the project number to be processed.

◆ **Period:** 3 digits
Enter a valid cost sharing period.

### *Screen Information*

◆ **Enter 'Y' to Delete:** 1 character
Type "Y" to delete the cost sharing portion.

### *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen if set up on Screen 821.

# Section VII
# Cost Sharing Inquiry

# Display All Cost Sharing Periods for a Project

Cost sharing requirements for all periods for a project is displayed on Screen 136. Select a cost sharing period on this screen to view summary data on Screen 137.

**Screen 136 - Cost Sharing All Period Summary**

```
   136 Cost Sharing All Period Summary                                02/16/09 10:09
                                                                       FY 2009 CC 99
   Screen: ___ Project: 4199210000


             Begin     End           Total              Total          Total
 Sel Period  Date      Date         Required            Actual        Remaining
 -------------------------------------------------------------------------------
  _    001  09/01/95  08/31/96
  _    002  09/01/96  08/31/98      108,820.35         55,439.79        53,380.56










                          *** End of List ***
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp        Next
```

## Basic Steps

- Type a project number in the ***Project*** field and press <ENTER>.
- Select a cost sharing period by typing an “X” in the ***Sel*** (Select) field and pressing <ENTER>. This will take you to Screen 137 where detailed cost sharing period summary information is displayed.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### ***Action Line***

◆ **Project:** * Help 10 digits
Enter the project number to display cost sharing requirements.

### ***Screen Information***

**Sel:** 1 character
Type “X” in this field to select cost sharing period to view additional information on Screen 137.

**Period:** 3 digits
Displays the time period assigned by FAMIS to define time slots for the cost sharing.

**Begin Date:** 8 digits
Provides the estimated date the cost sharing period will begin.

**End Date:** 8 digits
Shows the estimated date the cost sharing period will end.

**Total Required:** 12 digits
Displays the total dollars required for the cost sharing period.

**Total Actual:** 12 digits
Provides the actual dollars accumulated in the cost sharing period**.**

**Total Remaining:** 12 digits
Indicates the total dollars remaining in the cost sharing period.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Display Cost Sharing Period Summary

Screen 137 allows you to view specific account requirements for the cost sharing period.

The dollar amount in the ***Total Actual*** column is obtained from:

1) Running the Cost Sharing programs
2) Screen 132 when entered manually for another TAMUS Part
3) Screen 132 if the Cost Sharing programs are not run
4) Manual entry of historical data

**Screen 137 - Cost Sharing Period Summary**

```
  137 Cost Sharing Period Summary                                  02/16/09 10:10
                                                                    FY 2009 CC 99
  Screen: ___ Project: 4199210000 Period: 002

     Period Begin Date: 09/01/1996      Period Total Required:      108,820.35
       Period End Date: 08/31/1998        Period Total Actual:       55,439.79
                                        Period Total Remaining:      53,380.56
   Acct                                     Total        Total        Total
Sel CC   Account     Account Description    Required      Actual    Remaining
-------------------------------------------------------------------------------
 _ 00 000000 00000 UNRECOVERD INDIRECT C   41,845.35    38,547.23     3,298.12
 _ 05 110505 19921 SALARIES                66,975.00    16,892.56    50,082.44




                           *** End of List ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type a project number and period in the fields provided and press <ENTER>.
- Select an account by typing an "X" in the ***Sel*** (Select) field and pressing <ENTER>. This will take you to Screen 138 where you can view detailed account information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Project:** * Help 10 digits
Enter the project number to display cost sharing period information.

◆ **Period:** 3 digits
Enter valid cost sharing period.

## ***Screen Information***

**Period Begin Date:** 8 digits
Indicates the date the cost sharing period will begin.

**Period Total Required:** 12 digits
Shows the total dollar amount required for the cost sharing period.

**Period End Date:** 8 digits
Displays the date the cost sharing period will end.

**Period Total Actual:** 12 digits
Provides the total dollar amount accumulated in the cost sharing period.

**Period Total Remaining:** 12 digits
Shows the total dollar amount remaining in the cost sharing period.

**Sel:** 1 character
Type "X" to select a project account.

**Acct CC:** 2 digits
Shows the campus code for the account.

**Account:** 11 digits
Displays the assigned account number for the project.

**Account Description:** 21 characters
Provides the line description for the project.

**Total Required:** 12 digits
Indicates the total dollar amount required in the cost sharing period.

**Total Actual:** 12 digits
Displays the total dollar amount accumulated in the cost sharing period.

**Total Remaining:** 12 digits
Shows the total dollar amount remaining in the cost sharing period.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Cost Sharing Transactions by Project, Period, and Account

Screen 138 provides transaction detail associated with a specific project, period and account. The information displayed on this screen is a detailed list of the ***Total Actual*** amount on Screen 137.

**Screen 138 - Cost Sharing Transaction Detail**

```
  138 Cost Sharing Transaction Detail                                 02/16/09 10:19
                                                                       FY 2009 CC 99
  Screen: ___ Project: 4199210000 Period: 002 Account: 000000 00000 Acct CC: 00
            Fiscal Yr: ____   Month: __
     Period Begin Date: 09/01/1996     Account Total Required:       41,845.35
       Period End Date: 08/31/1998       Account Total Actual:       38,547.23
                                       Account Total Remaining:       3,298.12
      Proc
  FY   MM   Obj   Ref  D/C Date           Description                Amount
-------------------------------------------------------------------------------
 1998   5  9610 419921  D  05/31  UNRECOVERED INDIRECT - 05009         1464.90
 1998   6  9610 419921  D  06/30  UNRECOVERED INDIRECT - 05009         1755.01
 1998   7  9610 419921  C  07/31  UNRECOVERED INDIRECT - 00009            1.16-
 1998   7  9610 419921  D  07/31  UNRECOVERED INDIRECT - 05009         1528.50
 1998   8  9610 419921  C  08/31  UNRECOVERED INDIRECT - 00009           28.42-
 1998   8  9610 419921  C  08/31  UNRECOVERED INDIRECT - 03009           48.45-
 1998   8  9610 419921  C  08/31  UNRECOVERED INDIRECT - 04009          179.15-
 1998   8  9610 419921  D  08/31  UNRECOVERED INDIRECT - 05009         1657.77
 1998   8  9610         D  08/31  IDC CORRECTION                       29728.00
 1998   8  9610         D  08/31  SAL/WAGE                              3387.09
                     *** Press ENTER to Continue ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

Other screens which provide additional information:

| |
|---|
| **Screen 154** – View all accounts for a project |
| **Screen 137** – View all accounts for a cost sharing period |

## Basic Steps

- Type a project number and period in the fields provided and press <ENTER>.
- Enter the desired account number and account campus code, if other than displayed and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

◆ **Project:** Help 10 digits
Enter the project number to display cost sharing transactions to be viewed.

◆ **Period:** 3 digits
Enter valid cost sharing period.

◆ **Account:** 11 digits
Enter the account number assigned to the project.

◆ **Account CC:** 11 digits
Enter the campus code for the account.

- **Fiscal Yr:** 4 digits
  Enter the fiscal year of the cost sharing period.

- **Month:** 2 digits
  Enter the month of the cost sharing period to be displayed.

## ***Screen Information***

**Period Begin Date:** 8 digits
Displays the estimated date the cost sharing period is to begin.

**Account Total Required:** 12 digits
Shows total dollar amount required for cost sharing period for the account.

**Period End Date:** 8 digits
Provides the estimated date the cost sharing period is to end.

**Account Total Actual:** 12 digits
Shows total dollar amount accumulated in cost sharing period for the account.

**Account Total Remaining:** 12 digits
Displays total dollar amount remaining in account for the cost sharing period.

**FY:** 4 digits
Shows the fiscal year of the cost sharing period.

**Proc MM:** 2 digits
Provides the month the transaction is processed.

**Obj:** 4 digits
Indicates the object code of the specified transaction.

**Ref:** 6 digits
Displays the user-defined reference number for the cost sharing transaction.

**D/C:** 1 character
Designates whether the transaction is a debit or credit to the specified account.

**Date:** 4 digits
Shows the date of the transaction.

**Description:** 25 characters
Provides the line description of the transaction entry.

**Amount:** 12 digits
Displays the dollar amount of the transaction entry.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to next screen that follows as shown on Screen 821.

# Cost Sharing Requirements by Account

FAMIS provides cost sharing requirements information for an account on Screen 139. This screen shows all projects for an account, or has had requirements associated with it.

**Screen 139 - Cost Sharing Requirements by SL**

```
  139 Cost Sharing Requirements by SL                                  02/16/09 10:19
                                                                        FY 2009 CC 99
  Screen: ___  SL Account: 000000  Account Campus Cd: 00

Support                          Begin      End        Total          Total
Account  Project    Period       Date       Date       Required       Actual
-------------------------------------------------------------------------------
 00000  4862410000    1       09/15/93  08/31/95
 00000  4869810000    1       07/01/94  06/30/95
 00000  4869820000    1       07/01/95  08/31/95
 00000  4899910000    1       07/01/95  06/30/96        5,968.00
 00000  4906610000    1       04/15/95  08/31/95
 00000  4861220000    1       09/30/94  08/31/95
 00000  4306210000    1       09/01/95  08/31/98       24,699.00        7,325.68
 00000  4306610000    1       09/01/95  08/31/98       24,701.00       23,863.88
 00000  4300310000    1       09/01/95  08/31/99       92,195.00       90,864.32
 00000  4302310000    1       09/01/95  08/29/97       34,890.00        2,654.50
 00000  4305310000    1       09/01/95  08/31/98       26,421.00        8,636.25
 00000  4319610000    1       12/01/95  12/31/98       37,720.00       37,830.52
 00000  4315310000    1       09/01/95  02/28/99       70,745.00       59,387.57
                     ***** Press ENTER for more *****
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Type an account number and campus code in the fields provided and press <ENTER>.
- Use ***PF5*** to advance to Screen 112 to view additional information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **SL Account:** 6 digits
Enter the SL account number to be displayed.

◆ **Account Campus Cd:** 2 digits
Include the campus code for the SL account number.

### *Screen Information*

**Support Account:** 5 digits
Displays the support account number.

**Project:** 10 digits
Indicates the project number associated with the specified account.

**Period:** 3 digits
Defines the time period assigned by FAMIS to define time slots for the cost sharing.

**Begin Date:** 8 digits
Provides the date the cost sharing period begins.

| | |
|---|---|
| **End Date:** | 8 digits<br>Shows the date the cost sharing period ends. |
| **Total Required:** | 12 digits<br>Indicates the total dollar amount required for the cost sharing. |
| **Total Actual:** | 12 digits<br>Displays the total dollar amount accumulated in the cost sharing period. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Section VIII
# Processing Control
# Table Maintenance

# SPR System Table Menu

The Processing Control Table Maintenance and System Control Record Maintenance screens are displayed on Menu S01.

### Menu S01 – SPR System Table Menu

```
S01 SPR System Table Menu                                        02/16/09 10:21
                                                                  FY 2009 CC 99
Screen:

                 * Processing Control Table Maintenance *

801  Indirect Cost Table                  815  Coordinating Board Code Table
802  Distribution Code Table              816  Letter of Credit Table
804  Federal Domestic Assistance Table
805  GL Subcode Descriptions              850  Person Information
806  SL Subcode Descriptions              860  Department Table Maintenance
807  Award Estimates by Department        899  Maintain Dictionary Values
808  Proposal Estimates by Department
809  Keyword Table Maintenance


                  * System Control Record Maintenance *

                         821 Control Record
                         882 Campus Code Change

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

# Indirect Cost Table

Screen 801 defines the indirect cost bases available. Each A&M System Member can define as many indirect cost bases as needed.

The subcode ranges entered on this screen show the subcodes that will be **EXCLUDED** from indirect cost calculations.

**"MTDC" is now controlled at the System level and is not modifiable by the members.**

### Screen 801 – Indirect Cost Table

```
801 Indirect Cost Table                                          02/16/09 10:22
                                                                  FY 2009 CC 99
Screen: ___    Base: MTDC____

       Description: MODIFIED TOTAL DIRECT COST_______________

   ---- Subcode Exclusions ----                          Page: 1  of  6

   Func Code        Low    High              Error Message

       _            3511   3511
       _            3521   3521
       _            4702   4702
       _            4712   4712
       _            4723   4723
       _            4751   4751
       _            4782   4782
       _            5399   5399
       _            5554   5554
       _            5567   5567
          ** press ENTER to view more Entries **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

### PF2 Help Pop-Up Window for *Base* Field

```
+-----------------------------------------------------+
|  S2202 Mark field with an "X" to select             |
|  Screen: ___      Search: ________                  |
|                                                     |
|      Base        Description                        |
|  _ ADMN FEE ADMINISTRATIVE FEES MANUAL              |
|  _ ALLSTIPE INDIRECT ON STIPENDS 5991 & 6151        |
|  _ COMPLETE IDC TURNED OFF, ALL IDC HAS CHARGED     |
|  _ IDC CAP  CAP ON IDC HAS BEEN MET                 |
|  _ LIVALLOW INDIRECT ON 7141 LIVING ALLOWANCE       |
|  _ MANUAL   MANUAL INDIRECT COST                    |
|  _ MTDC     MODIFIED TOTAL DIRECT COST              |
|  _ MTDC-S&F MTDC WITH SALARY & FRINGE EXEMPT        |
|  _ MTDC-TRV MTDC WITH ALL TRAVEL EXEMPT             |
|  _ NONE     NO INDIRECT COST                        |
|  _ PART EXP INDIRECT ON PARTICIPANT EXPENSE 6152    |
|  _ PART STI INDIRECT ON PARTICIPANT STIPENDS 6151   |
|  _ PART SUP INDIRECT ON PARTICIPANT SUPPORT 6150    |
|            ** More entries **                       |
|                                                     |
+-----------------------------------------------------+
```

# Basic Steps

- Enter an indirect cost base code table in the ***Base*** field and press <ENTER>.
- Type the desired function code in the ***F*** field, enter a subcode range to be excluded, and press <ENTER>.
- Modify or add additional subcode ranges and press <ENTER> to record the information.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Base:** * Help 8 characters
Enter the name of the indirect cost table, or select one from the pop-up window.

## *Screen Information*

**Description:** 40 characters
Enter or modify the description of the indirect cost base selected.

**Func Code:** 1 character
Indicate the desired function code to add or modify a range of subcode exclusions: Add (A), Update (U), or Delete (D)

**Low:** 4 digits
Enter the starting subcode of the range for exclusion.

**High:** 4 digits
Enter the ending subcode of the range for exclusion.

**Error Message:** 30 characters
Displays message regarding an error detected on a line during processing data entered.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Indirect Distribution Table

Screen 802 is used to define the distribution of the indirect cost. This allows for the distribution of the indirect cost across multiple accounts.

There is no limit to the number of Distribution Codes. Each Distribution Code can have up to 30 accounts.

You can distribute many accounts, but the percentages entered must total "100." In some cases, the distribution will go to one account and the research administrator will decide who gets what part of the IDC.

For revenue accounts, the amount is posted with the revenue object code on Screen 9 of the offset grant account, or on Screen 51 if a support account.

The total percentage entered on this screen must equal "100 percent."

**Screen 802 – Indirect Distribution Table**

```
802 Indirect Distribution Table                                  02/16/09 10:25
                                                                  FY 2009 CC 02
Screen: ___  Dist Code: STATE_____                        Delete: N <Y/N>

           Description: STATE INDIRECT COST REVENUE_____________

Func                                                          Page: 1  of  1
Code      Percent     Account            Account Description

 _        100.00    230002 00000   STATE GRANTS - INDIRECT COST
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____
 _        ______    ______ _____

    TOTAL: 100.00                          **  End of list  **
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Enter the distribution table code in the ***Dist Code*** field and press <ENTER>. This window will list distribution code information in alphabetical order.
- If this distribution table code is to be deleted, type "Y" in the ***Delete*** field and press <ENTER>.
- If adding or modifying the percent of distribution for an account number, place the cursor in the ***Func Code*** field and type the desired function code: Add (A), Update (U) or Delete (D).
- Enter the percentage to be distributed in the ***Percent*** field and the account number in the ***Account*** field. The amount entered must total to 100 percent.
- Press <ENTER> to record the information.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Dist Code:** * Help 10 characters
Enter the code for the indirect cost distribution.

**Delete:** 1 character
Type "Y" to delete the distribution code.

**Description:** 40 characters
Displays the description of the indirect distribution code selected.

## *Screen Information*

**Func Code:** 1 character
Designate the function desired: A (Add), U (Update), or D (Delete).

**Percent:** 5 digits
Enter the percentage of indirect cost to be distributed.

**Account:** 11 digits
Enter the account number for the indirect cost distribution.

**Account Description:** 30 characters
Displays the description of the account number for the distribution code selected.

**Total:** 5 digits
Displays total percentage of distribution.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Federal Domestic Assistance Table

The codes to be used for Federal Domestic Assistance are shown on Screen 804. CFDA (Catalog of Federal Domestic Assistance) codes are used in preparation of Schedule D-5 of the TAMUS Annual Financial Report.

The letter codes in parentheses indicate that these CFDA codes can only be used by certain projects.

**By agreement, this table is maintained by TAMRF.**

Security on this screen for all System members has been set to "**inquiry only**."
For updates/corrections/additions contact:
SRS/Texas A&M Research Foundation at srscfda@tamus.edu.

**Screen 804 – Federal Domestic Assistance (CFDA) Table**

```
  804 Federal Domestic Assistance (CFDA) Table                    02/16/09 10:26
                                                                   FY 2009 CC 02
  Screen: ___  CFDA Code: _______
                                                                      NSF
    CFDA                                                             Default
 F  Code   Description                                              Category
 _ 02.000_ INVALID - 07/31/07 - DO NOT USE_____________________ USDA____
 _ 08.000_ INVALID - 07/31/07 - DO NOT USE_____________________ OTHER___
 _ 10.000_ DEPARTMENT OF AGRICULTURE___________________________ USDA____
 _ 10.001_ AGRICULTURAL RESEARCH_BASIC AND APPLIED RESEARCH____________
 _ 10.025_ PLANT AND ANIMAL DISEASE, PEST CONTROL, AND ANIMAL CARE____
 _ 10.028_ WILDLIFE SERVICES___________________________________________
 _ 10.051_ COMMODITY LOANS AND LOAN DEFICIENCY PAYMENTS_________________
 _ 10.052_ INVALID - 05/31/01 - DO NOT USE_____________________________
 _ 10.053_ DAIRY INDEMNITY PROGRAM_____________________________________
 _ 10.054_ EMERGENCY CONSERVATION PROGRAM______________________________
 _ 10.055_ DIRECT AND COUNTER-CYCLICAL PAYMENTS PROGRAM_________________
 _ 10.058_ INVALID - 05/31/01 - DO NOT USE_____________________________
 _ 10.059_ INVALID - 05/31/01 - DO NOT USE_____________________________
 _ 10.062_ INVALID - 07/31/07 - DO NOT USE_____________________________
                    ***  PRESS ENTER FOR MORE ENTRIES  ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next                   Dload
```

## Basic Steps

- Type the ***CFDA Code*** number you wish to be displayed at the top of the list, or press <ENTER> to scroll through the list of available codes.
- Enter the desired function in the ***F*** field: Add (A), Update (U), or Delete (D).
- Add, modify or delete a code and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **CFDA Code:** 6 digits
Enter the Catalog of Federal Domestic Assistance (CFDA) Code under which the project is classified, or scroll through the list by pressing <ENTER> to find the code desired.

## ***Screen Information***

**Func:** 1 character
Type the desired function for the selected CFDA Code: Add (A), Update (U), or Delete (D). Press <ENTER> to process function.

**CFDA Code:** 6 digits
Enter or modify the Catalog of Federal Domestic Assistance Code under which the project is classified.

**Description:** 60 characters
Include a description of the CFDA Code.

**NSF Default Category:** Help 8 characters
Indicates the agency code for split-out on the NSF report.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

**PF9** **Download**
**Dload** Used to download information using Entire Connection.

# Coordinating Board Code Table

Information regarding the Coordinating Board Code is found on Screen 815. Coordinating Board Codes are used in preparation of the TAMUS reports to the Texas Higher Education Coordinating Board (THECOB).

**Screen 815 – Coordinating Board Code Table**

```
815 Coordinating Board Code Table                                  02/16/09 10:27
                                                                    FY 2009 CC 02
Screen: ___ Table Type: THECOBFIELD____


 Func   Code                        Description
  _      2A1    ENG - AERONAUTICAL & ASTRONOMICAL_____________________________
  _      2A2    ENG - CHEMICAL________________________________________________
  _      2A3    ENG - CIVIL___________________________________________________
  _      2A4    ENG - ELECTRICAL______________________________________________
  _      2A5    ENG - MECHANICAL______________________________________________
  _      2A6    ENG - METALLURGICAL & MATERIALS_______________________________
  _      2A7    ENG - OTHER___________________________________________________
  _      2A8    ENG - BIOENGINEERING/BIOMEDICAL_______________________________
  _      2B1    PHYS - ASTRONOMY______________________________________________
  _      2B2    PHYS - CHEMISTRY______________________________________________
  _      2B3    PHYS - PHYSICS________________________________________________
  _      2B4    PHYS - OTHER__________________________________________________
  _      2C1    ENV - ATMOSPHERIC_____________________________________________
  _      2C2    ENV - EARTH SCIENCES__________________________________________
                  ***  PRESS ENTER FOR MORE ENTRIES  ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- In the ***Table Type*** field, type "THECOB" and append one of the following valid values: ACT, FIELD, AREA, WORK, or PROC. (Example: THECOBACT)
- Type the desired function code in the ***Func*** field: Add (A), Update (U), or Delete (D), to add, modify or delete items from this table and press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Action Line*

◆ **Table Type:** 15 characters
Enter one of the valid table type values appended to "THECOB:" ACT, FIELD, AREA, WORK, or PROC. (Example: "THECOBACT")

### *Screen Information*

**Func:** 1 character
Enter the desired function code: Add (A), Update (U), or Delete (D) and press <ENTER>.

**Code:** PF2 Help 3 digits/characters
Enter or modify an existing code.

**Description:** 60 characters
Provide a description of the Coordinating Board Code.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Letter of Credit Table

Letters of Credit are defined on Screen 816. This screen is used primarily by the TAMU Research Foundation, but is available for anyone who might find it useful.

**This table should be maintained by only one or two people at each campus. FAMIS personnel do not have update access to this screen.**

**Screen 816 – Letter of Credit Table**

```
816 Letter of Credit Table                                    02/16/09 10:27
                                                               FY 2009 CC 99
Screen: ___

       Credit
Func    Type                        Description
  _     AID___     AGENCY FOR INTERNATIONAL DEVELOPMENT_____________________
  _     CBA___     CASH BALANCE ACCOUNTS - FULLY FUNDED_____________________
  _     CSW___     CENTER FOR THE STUDY OF WSTRN. HEM. TRADE________________
  _     DED___     DEPARTMENT OF EDUCATION__________________________________
  _     DOI___     U.S.DEPARTMENT OF THE INTERIOR___________________________
  _     DOI-PV     U.S.DEPARTMENT OF THE INTERIOR___________________________
  _     DOIMMS     U.S.DEPARTMENT OF THE INTERIOR, MINERAL MANAGEMENT SERVICE__
  _     DOJ___     U.S. DEPARTMENT OF JUSTICE_______________________________
  _     DOL___     U.S. DEPARTMENT OF LABOR_________________________________
  _     DOS___     U.S. DEPARTMENT OF STATE_________________________________
  _     ECD___     DEPARTMENT OF ENERGY - CHICAGO___________________________
  _     ECDC__     DEPARTMENT OF ENERGY - COLORADO__________________________
  _     EID___     DEPARTMENT OF ENERGY - IDAHO_____________________________
  _     EPA___     ENVIRONMENTAL PROTECTION AGENCY__________________________
                    ***  Press enter for more entries  ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

There are three reports available using the letter of credit information: FBAR140 (Letter of Credit Report), FBAR141 (Estimated Cash Report), and FBAR335 (Unbilled Receivables for Sponsored Research). The SBAR302 (Download of Project Information) is also available for downloading.

## Basic Steps

- To modify or delete a letter of credit type listed on this table by typing the desired function code in the ***Func*** field: Update (U) or Delete (D).
- To add a type of credit to the existing table type "**A**" (Add) in the ***Func*** field and include the FAMIS Letter of Credit type code in the ***Credit Type*** field.
- Press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Screen Information*

**Func:** 1 character
Indicate the desired function code: Add (A), Update (U), or Delete (D).

**Credit Type:** 6 characters
Enter the FAMIS credit type or add additional types.

**Description:** 60 characters
Include the description of the FAMIS assigned credit type.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Award Estimates by Department Table

Screen 807 is used to track the estimated and actual dollars awarded by a department. This screen displays the information reported by month for the fiscal year selected.

**Screen 807 – Award Estimates By Department Table**

```
807 Award Estimates By Department Table                          02/16/09 10:34
                                                                  FY 2008 CC 02
Screen: ___  Dept: CHEM
      Fiscal Year: 2008
                 ------- Estimate -------          -------- Actual --------
                 Count          Amount             Count          Amount
                 ------------------------          ------------------------
September          ___     _______________           _1      _____112579.98
October            ___     _______________           ___     _______________
November           ___     _______________           ___     _______________
December           ___     _______________           ___     _______________
January            ___     _______________           ___     _______________
February           _9_     _13222245.00__            11_     __15432900.00
March              ___     _______________           ___     _______________
April              ___     _______________           ___     _______________
May                ___     _______________           ___     _______________
June               ___     _______________           ___     _______________
July               ___     _______________           ___     _______________
August             ___     _______________           ___     _______________

** YTD Total        0                0.00             0                0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Hmenu Help  EHelp       Next
```

## Basic Steps

- Enter a department code in the ***Dept*** field, or press ***PF2*** or type a question mark (?) in this field and select a code from the pop-up window. Type an "X" in the ***Select*** field next to the desired code to pass it back to the ***Dept*** field on Screen 807. To exit the pop-up window without making a selection, press ***PF4***.

## Tracking Award Estimates

### Research Information Tracking by Department

Some of The Texas A&M System members are using the Research Information Tracking by Department feature in FAMIS as a tool for their reporting needs. There are currently two types of tracking in place: one is "Awards by Department," and the other is "Proposals by Department". These two processes are similar in that they allow you to enter estimated counts and dollars, run FAMIS programs to "lock" and display the "actual" counts and dollars for comparison.

**It is necessary to run the FAMIS programs one month at a time and then to lock down the data. This is the only way that the year-to-date (YTD) figures will tie on the hard copy reports that are generated from this process.**

**Chart of Research Information by Department:**

| Process | Awards | Proposals |
|---|---|---|
| Enter estimates | Screen 807 | Screen 808 |
| Request reports for a month<br>Each month must be reviewed and locked down separately. | SBMR400 | SBMR440 |
| Review reports before lock-down<br>There is no unlock feature. | | |
| Request lock-down programs<br>This prevents changing reported data. | SBMU401 | SBMU421 |

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Dept:** ? Help 5 digits
Enter the department code to which the awards are made.

## *Screen Information*

**Fiscal Year:** 4 digits
Displays the current fiscal year. Change the year to display a different year's information.

***Estimate***

**Count:** 3 digits
Enter the estimated count for the month.

**Amount:** 14 digits
Indicate the estimated dollar amount of the award for the month.

***Actual***

**Count:** 3 digits
Provide the actual count for the month.

**Amount:** 14 digits
Enter actual dollar amount of award for month.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Proposal Estimates By Department Table

Use Screen 808 to track the estimated and actual proposal dollars for a department. This screen displays the amount reported by month for the designated fiscal year.

**Screen 808 – Proposal Estimate By Department Table**

```
808 Proposal Estimate By Department Table                    02/16/09 10:39
                                                              FY 2009 CC 99
Screen: ___  Dept: 41816
      Fiscal Year: 2009
                 ------- Estimate -------          -------- Actual --------
                 Count         Amount              Count         Amount
                 ------------------------          ------------------------
September          ___     _______________           ___     _______________
October            ___     _______________           ___     _______________
November           ___     _______________           ___     _______________
December           ___     _______________           ___     _______________
January            ___     _______________           ___     _______________
February           ___     _______________           ___     _______________
March              ___     _______________           ___     _______________
April              ___     _______________           ___     _______________
May                ___     _______________           ___     _______________
June               ___     _______________           ___     _______________
July               ___     _______________           ___     _______________
August             ___     _______________           ___     _______________

** YTD Total        0                0.00             0                0.00
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
     Hmenu Help  EHelp       Next                                   Next
```

## Basic Steps

- Type a department code in the ***Dept*** field and press <ENTER>.
- Enter data in the fields available and press <ENTER> to record the information.

## Tracking Proposal Estimates

### Research Information Tracking by Department

Some A&M System members are using the Research Information Tracking by Department feature in FAMIS as a tool for their reporting needs. There are currently two types of tracking in place: one is “Awards by Department,” and the other is “Proposals by Department”. These two processes are similar in that they allow you to enter estimated counts and dollars, run FAMIS programs to “lock” and display the “actual” counts and dollars for comparison.

**It is necessary to run the FAMIS programs one month at a time and then to lock down the data. This is the only way that the year-to-date (YTD) figures will tie on the hard copy reports that are generated from this process.**

**Chart of Research Information by Department:**

| Process | Awards | Proposals |
|---|---|---|
| Enter estimates | Screen 807 | Screen 808 |
| Request reports for a month<br>Each month must be reviewed and locked down separately. | SBMR400 | SBMR440 |
| Review reports before lock-down<br>There is no unlock feature. | | |
| Request lock-down programs<br>This prevents changing reported data. | SBMU401 | SBMU421 |

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Dept:** ? Help 5 digits
Enter the department code to which the proposals are associated.

## *Screen Information*

**Fiscal Year:** 4 digits
Shows the current fiscal year for displaying the proposal estimates. Change date to view a specific year.

***Estimate***

**Count:** 3 digits
Enter the estimated count of the proposal for the month.

**Amount:** 14 digits
Indicate the estimated dollar amount of the proposal for the month.

***Actual***

**Count:** 3 digits
Include the actual count of the proposal for the month.

**Amount:** 14 digits
Indicates the actual dollar amount of the proposal for the month.

**YTD Total:** 3 digits/14 digits
Displays the year-to-date totals of the columns.

## *Additional Functions*

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF5** **Next**
**Next** Goes to the next screen that follows according to information shown on Screen 821.

# Keyword Table Maintenance

FAMIS allows you to maintain a tax code table and the messages concerning these codes. (This functionality is currently not used.)

This screen is maintained and updated by FAMIS Services.
**The information is campus specific.**

**Screen 809 – Keyword Table Maintenance**

```
809 Keyword Table Maintenance                                   02/16/09 10:41
                                                                 FY 2009 CC 99
Screen: ___ Keyword: EUROPE_________ Description Search: N (Y/N)
              Table: R (P=Part Defined, R=Rodman's Thesaurus)

  Func   Code               Description
  _      0101000________    AFRICA_____________________________________
  _      0101001________    AFRICA, CENTRAL____________________________
  _      0101002________    AFRICA, EASTERN____________________________
  _      0101003________    AFRICA, NORTHERN___________________________
  _      0101004________    AFRICA, SOUTHERN___________________________
  _      0101005________    AFRICA, WESTERN____________________________
  _      0101006________    AFRICA, SUB-SAHARA_________________________
  _      0102000________    ANTARCTICA_________________________________
  _      0103000________    ASIA_______________________________________
  _      0103001________    ARABIAN PENINSULA__________________________
  _      0103002________    ASIA, CENTRAL______________________________
  _      0103003________    ASIA, EAST (FAR EAST)______________________
  _      0103004________    MIDDLE EAST________________________________
  _      0103005________    ASIA, NORTHERN_____________________________
                   ***  Press ENTER for More Entries  ***
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Enter a keyword for either the tax code number or the description in the ***Keyword*** field. If the keyword is the description, type "Y" in the ***Description Search*** field.
- In the ***Table*** field, indicate if the table for the keyword is Part Defined (P) or Rodman's Thesaurus (R) and press <ENTER>.
- Enter the desired function code in the ***Func*** field: Add (A), Delete (D), or Update (U).
- Include an additional code or modify an existing code and description then press <ENTER>.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

***Action Line***

**Keyword:** 15 digits/characters
Enter a keyword to add, modify or delete.

**Description Search:** 1 character
Type "Y" to search by description.

**Table:** 1 character
Identify whether you are maintaining a Part Defined table or Rodman's Thesaurus.

## ***Screen Information***

| | |
|---|---|
| **F:** | 1 character<br>Indicate the desired function code: Add (A), Delete (D), or Update (U). |
| **Code:** | 15 digits<br>Enter a numeric code to identify the tax code. |
| **Description:** | 50 characters<br>Include the description of the keyword. |

## ***Additional Functions***

| | |
|---|---|
| **PF KEYS** | See the Appendix for explanation of the standard PF keys. |
| **PF5**<br>**Next** | **Next**<br>Goes to the next screen that follows according to information shown on Screen 821. |

# Person Information

Use Screen 850 to add a new researcher to FAMIS. This screen also allows you to modify a researcher's personal data.

**Screen 850 – Person Information**

```
  850 Person Information                                          02/16/09 10:47
                                                                          CC 99
  Screen: ___  Person: 7uuuuuuu8            Inactive: _   Delete: _ (Y/N)

Person's Name: (Last) ABRAMS_________ (First) ALAN______  (MI) A (Suffix) _____
                                                                 (Prefix) _____
      SSN: 2ss-ss-sss0          Title Code: 7360 RESEARCH ASSOCIATE
    Phone: 979-845-0000 ____    Date Hired: 08/27/2003      Gender: M
      FAX: ____________         Adloc Part: 08 Acct: 132000 Suffix: _
BPP phone: 979-845-0000

Home  CC  Dept  S-Dept  Address: ________________________________  Mail Cd: _____
      02  AERO_  _____           ________________________________
      __  _____  _____           ________________________________
      __  _____  _____     City: ________________   State: __
                            Zip: _________       Country: ___
                                                          Routing Email Prefs
                                                                     *** EPA
  PI/Researcher: _      Email from BPP: Y                   Notify Freq: _   _
E-Mail: aaaa@neo.tamu.edu_____________________________________       Type: N   N
Printer Default: ____________________________________           Voided Apps: N   N
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp
```

If you type a person's name in the ***Person*** field, the following pop-up screen will appear to allow you to make a selection.

**Screen 850 – Person Information Pop-Up Window**

```
+-----------------------------------------------------------------------------+
|  S2201 Mark Person with an "X" to select                                    |
|   Screen: ___ Search: ABRAMS_____________ Type: N (N=Name, I=UIN)           |
|                                        Inactive: N                          |
|  S                Name              UIN       SSN   Alias CC Dept SDept In  |
|  _ ABRAMS, ALAN A   L            1uuuuuuu4 4sssssss0  N   05 CLUC           |
|  _ ABRAMS, LANNY l               8uuuuuuu4 5sssssss0  N                     |
|  _ ABRAMS, LYN L                 8uuuuuuu7 2sssssss3  N   21 DNSTU          |
|  _ ABRAMS, MAURY M               7uuuuuuu2 4sssssss5  N   02 HLKN           |
|  _ ABRAMS, MAVIA M               4uuuuuuu9 3sssssss5  N   02 INEN           |
|  _ ABRAMS, RAUL                  2uuuuuuu4 4sssssss4  N   05 NURS           |
|  _ ABRAMS, ROGER R               9uuuuuuu9 4sssssss6  N   02 CLAR           |
|  _ ABRAMS, TITO T                5uuuuuuu9 6sssssss3  N   02 FAID           |
|                                                                             |
|                                                                             |
|                                                                             |
|                                                                             |
|                                                                             |
|        ** END OF LIST - 8 PERSON(S) FOUND **                                |
|                      PF4=Exit                                               |
+-----------------------------------------------------------------------------+
```

## Basic Steps

- Enter the personal identification number (UIN) for the new researcher, or search and select a researcher from a pop-up list by typing an asterisk (*) in the ***Person*** field and pressing <ENTER>. This pop-up window will also be displayed when you type a researcher's name in this field.
- Enter "Y" in the ***Delete*** field to delete the specified researcher's personal information.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## *Action Line*

◆ **Person:** * Help 9 digits
Enter the researcher's personal identification number.

## *Screen Information*

**Inactive:** 1 character
Type "Y" to inactivate the personal identification number entered in the ***Person*** field.

**Delete:** 1 character
Type "Y" to delete the personal identification number entered in the ***Person*** field from the system.

**OSRS:** 1 character
"Y" identifies this is an SRS employee.

***Person's Name:***

**Last:** 15 characters
Type the last name of the researcher.

**First:** 10 characters
Include the first name of the researcher.

**MI:** 1 character
Enter the initial of the middle name of the researcher.

**Suffix:** 5 characters
Type the suffix of the researcher.

**Prefix:** 5 character
Include the prefix of the researcher.

**SSN:** 9 digits
Displays the researcher's Social Security Number. Only visible with proper security level.

**Title Code:** ? Help 4 digits
Provide the title code of the researcher.

**Phone:** 14 digits
Indicate the phone number and extension number where the researcher can be reached.

**Date Hired:** 8 digits
Include the date the researcher was hired.

**Gender:** ? Help 1 character
Enter the gender of the researcher: F (Female) or M (Male).

**FAX:** 10 digits
Provide the fax number where faxes can be sent to the researcher.

**Adloc Part:** ? Help 2 digits
Enter the campus code for payment of salary.

**Acct:** 6 digits
Identify the account number to be used for payment of salary.

**Suffix:** 1 character
Provide the suffix associated with the Adloc Part code.

**BPP Phone:** 10 digits
Displays the office phone number for the researcher.

**Home**

**CC:** ? Help 2 digits
Enter the researcher's campus code.

**Dept:** PF2 Help 5 characters
Type the department associated with the researcher; used to cross-reference with other TAMUS parts.

**S-Dept:** PF2 Help 5 characters
Provide a cross-reference for the researcher's sub department information with other TAMUS parts.

**Address:** 3 lines/30 characters
Include the researcher's mailing address.

**Mail Cd:** ? Help 5 character/digits
Indicate the mail stop code for the researcher's department.

**City:** 15 characters
Provide the home city of the researcher's address.

**State:** ? Help 2 characters
Enter the home state of the researcher's address.

**Zip:** 9 digits
Indicate the Zip code for the researcher's address.

**Country:** ? Help 3 characters
Identify the home country for the researcher's address.

**PI/Researcher:** 1 character
Type "Y" if the researcher is a Principal Investigator.

**E-Mail from BPP:** PF2 Help 1 character
Displays "Y" if current email address was obtained from the BPP employee file. It shows "N" if it is changed on Screen 850, Screen 001, or through Canopy.

**Email:** 50 characters
Enter the person's email address.

**Printer Default:** 30 characters
Identify the printer default information for reports and printouts.

### *Routing Email Prefs *** / EPA*

**Notify Freq:** **PF2 Help** 1 character
Displays the frequency for inbox email notification: daily, every document, or weekly.

**Type:** **PF2 Help** 1 character
Identifies the type of email documents sent to the researcher's inbox: approvals only:"N" for none (no email), "Y" for all (includes notifications).

**Voided Apps:** 1 character
Determines if email notification is sent for voided applications.
Y = Send email notification
N = Don't send email notification

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

# Department Table Maintenance

FAMIS provides a table of valid departments for each campus. These department codes are used extensively throughout FAMIS. Both FRS and FFX modules utilize this table.

Screen 860 is used to add a new department to FAMIS by authorized personnel. You can also modify information on existing departments and expire a department to make it inactive. Departments cannot be deleted. Other important information includes the following:

- **School/College** - This is the only screen where you can update this field. It will not be a protected field for anyone who has update access to the screen. The ***School/College*** field is also protected if you are trying to modify it on a sub-department. Remove it from the department and all its sub-departments by taking the college off of the department (FISA or FISC). The change will ripple to all of the sub-departments.
- **EPA Allow Flag** – This flag controls the creation on EPA documents and was added for Form 500 processing. Entering "Y" allows the department to create EPA documents, which will be routed through the department. If the flag is off ("N" or blank), you will still be able to view payroll data in CANOPY, provided you have the appropriate security clearance to do so.
- **Purchasing Trn Flag –** If not set to "Y" on this screen, FAMIS does not recognize that routing of purchasing documents exists for the department.
- **Exec Level –** This field is a code that can be used as a sort field by many of our reports to group all accounts that report to a specific level (such as a report of all accounts for a particular Vice President). The values are campus specific so each campus assigns their own values.

This screen is maintained and updated by each campus.
**The information is campus specific.**

**Screen 860 – Department Table Maintenance**

```
  860 Department Table Maintenance                                07/09/09 09:53
                                                                          CC 02
  Screen: ___   Department: METR_  Sub Dept: _____
           Dept Name: ATMOSPHERIC SCIENCES_____________________
     Head/Director ID: 4uuuuuuu5                Alt APO ID: 6uuuuuuu9
                       WINSTON, WILMA                       REINER, RITA
  Head/Director Phone: 979-862-4444          Alt APO Phone: 979-862-3333
           Mail Code: C3150               Building Number: 00443
          Exec Level: AA                  Building Campus: 02
            Division: CD                             Room: ______
      School/College: GE                         Group Cd: _____
     Off Campus Flag: N                         Other Loc: ____________________
 Budget Sort Dept Nbr: _____            Approx. Inv. Count: _______
   Allow Flags:  FRS: Y  EPA: Y  DBR: Y  DCR: Y  SciQuest: _  FFX: Y  TDP: _
      Purch Trn Flag: Y                   FFX Cert. Month: 4_     Surplus: _
   Maestro: Org Unit: 8441______    Parent Dept: _____   Center/Institute: __
       Atmospheric Sciences             Mail to Dept Head: _
      Other Part Nbr: __        Dept Office: METOFFICE      General Comments: Y
     Other Part Dept: _____       Dept View: METOFFI CE           Hit <PF10>
 Other Part Sub Dept: _____     Exec Office:                    FFX Comments: Y
 Dept Expiration Date: _________  Exec View:                     Hit <PF11>
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp                    Audit       Dload GenCm FFXCm
```

**A department can't be deleted, it can only be "expired" by entering the expiration date in the *Dept Expiration Date* field.**

# Basic Steps

- Enter a department code in the ***Department*** field, and include a ***Sub Department***, if needed. You may also type an asterisk (*) in the ***Department*** field to view a list of available departments and subdepartments. If the department is not listed in the pop-up box, enter an "i" in the ***Type*** field to search by Department ID. This will allow you to find what you are searching for if it is an active department or subdepartment.
- Press <ENTER> to view the information.

# Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

## ***Action Line***

◆ **Department:** * Help 5 characters
Enter a valid department code.

**Sub Dept:** 5 characters
Enter the sub-department, if needed.

## ***Screen Information***

**Dept Name:** 50 characters
Enter the full name of the department.

◆ **Head/Director ID:** ? Help 9 digits
Provide the Social Security number. The name will be displayed when you press <ENTER>.

**Alt APO ID:** ? Help 9 digits
Enter the name and ID of the alternate APO (accountable property officer).

**Head/Director Phone:** 10 digits
Indicate the phone number of the head/director of the department.

**Alt APO Phone:** 10 digits
Provide the phone number of the alternate APO.

**Mail Code:** ? Help 1 character
Enter the mail code for the department.

**Building Number:** ? Help 5 digits
Identify the building that the department is located in.

**Exec Level:** ? Help 2 characters
Include the executive level of the department.

**Building Campus:** 2 digits
Identify the campus code for the building.

**Division:** ? Help 2 characters
Provide division code reflecting the structure of the campus.

**Room:** 6 digits
Include the room or the floor of the department.

**School/College:** ? Help 2 characters
Provide the level of organizational structure.

**College Dept:** 5 characters
Indicates the department that represents the college dean.

**Group Cd:** 5 characters
Used for grouping departments together for special purposes, perhaps security or reporting.

**Off Campus Flag:** 1 character
Identify whether or not the department is located off campus.

**Other Loc:** 20 characters
Provide information as to whether or not the department is located in more than one location.

**Budget Sort Dept Nbr:** ? Help 4 characters
Used for AL-RSCH budget sort number.

**Approx. Inv. Count:** 6 characters
Use for the entry of approximate inventory numbers.

***Allow Flags***

**FRS:** 1 character
Indicate whether this department is valid for accounting in FRS.

**EPA:** PF2 Help 1 character
Indicate whether or not ("Y" or "N") the department is allowed to create EPA documents.

**DBR:** 1 character
Indicate whether or not the department is allowed to create Departmental Budget Records.

**DCR** 1 character
Type "Y" if the department is allowed to initiate a Departmental Correction Request for an accounting event that has previously posted.

**SciQuest:** 1 character
Type "Y" to identify this department is using the SciQuest application.

**FFX:** 1 character
Indicate whether this department is valid for asset control in FFX.

**TDP:** 1 character
Signify whether or not the department is allowed to initiate Departmental Property Transfers.

**Purch Trn Flag:** 1 character
Identify whether this department has been fully trained and is ready to use the Purchasing system.

**FFX Cert Month:** 2 digits
Indicate the month for inventory certification for this department.

***Maestro***

**Org Unit:** 10 digits
Identify the number of the organization unit. (as determined by TEES). This is used to group departments together for reporting.

**Parent Dept:** **? Help** 5 characters
Enter a valid FAMIS department. This allows FAMIS to identify the departmental hierarchy along with the current standard hierarchy levels (executive, department, division, college, etc.) **By default the department is the parent department for a department with a subdepartment and is not modifiable.**

**Center/Institute:** **? Help** 2 characters
Used to determine if a department is a Center or Institute and to group departments together for reporting.

| | | |
|---|---|---|
| Blank | = | Regular department |
| CA | = | Center – Board Approved |
| CG | = | Center – Grandfathered |
| CN | = | Center – Not Board Approved |
| IA | = | Institute – Board Approved |
| IG | = | Institute – Grandfathered |
| IN | = | Institute – Not Board Approved |

**Surplus:** 1 character
Identify if this is a designated Surplus department.

**Other Part Nbr:** 2 digits
Include another campus code that owns part of the department inventory.

**Mail to Dept Head:** 1 character
Identify if the department head or director wants to receive a statement.

**Other Part Dept:** 5 characters
Enter the department on another campus code that owns part of the department inventory.

**Dept Office:** **PF2 Help** 10 characters
Shows the office for Routing & Approvals that governs this department.

**Other Part Sub Dept:** 5 characters
Enter the other FAMIS member's sub-department, if needed.

**Dept View:** PF2 Help 10 characters
Indicates the electronic view within the electronic office for Routing & Approvals that governs this department.

**Exec Office:** PF2 Help 10 characters
Shows the executive office for Routing & Approvals that governs this department.

**Dept Expiration Date:** 8 characters
Shows the date the department will expire. This date can be removed to reuse a Department Code.

**Exec View:** 10 characters
Shows the electronic view within the executive office for Routing & Approvals that governs this department.

**General Comments:** 1 character
Indicates whether or not ("Y" or "N") comments have been entered.

**FFX Comments:** 1 character
Indicates whether or not ("Y" or "N") comments have been entered.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanation of the standard PF keys.

**PF7 Audit** **Audit Information**
Displays the departmental table audit information.

**PF9 Dload** **Download**
Download information from this screen using Entire Connection.

**PF10 GenCm** **General Comments**
View general comments.

**PF11 FFXCm** **Fixed Assets Comments**
View Fixed Assets comments.

# Section IX
# System Control Record Maintenance

# Control Record Maintenance

Screen 821 controls the institution information of the FAMIS Sponsored Research module.

The rate used in calculating the indirect cost comes from FRS Screen 9. There are accounts tied to the project and **the rate can be different for each account**. You will need to check FRS Screen 9 for each account listed on SPR Screen 137 to see what rate has been used.

The information in the ***TAMUS Indirect Base*** and ***TAMUS Indirect Rate*** fields is used by SBMR281 (Cost Sharing Transaction Generator) to include the unrecovered exclusion table information as part of the process when generating cost sharing transactions. Some System Members use these fields and some do not.

**Screen 821 – Control Record Maintenance**

```
  821 Control Record Maintenance                                  02/16/09 10:57
                                                                   FY 2009 CC 99
  Screen: ___

          Campus Name: TEXAS A&M RESEARCH FOUNDATION___________

 TAMUS Indirect Base: ________    TAMUS Indirect Rate: ______

   Sponsor Campus Cd: 99        User Assign Proposal Format: NNNNNNN
Researcher Campus Cd: **               Last Sponsor  Number: 2947___
                                       Last Project  Number: 4_________
                                       Last Proposal Number: _____
                                  Last YR Last Proposal Number: _____
Proposal Screens:
    011   012   013   014   015   016   017   019   021   022
    ___   ___   ___   ___   ___   ___   ___   ___   ___   ___

Project Screens:
    110   111   112   113   114   116   118   119   121   122
    129   ___   ___   ___   ___   ___   ___   ___   ___   ___

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

## Basic Steps

- Add a campus name or make modifications to the ***Campus Name*** field.
- Enter information in the available fields and press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Screen Information*

**Campus Name:** 40 characters
Enter or modify the name of the campus or agency.

**TAMUS Indirect Base:** 8 digits
Indicate the indirect cost base as set by the individual A&M member.

**TAMUS Indirect Rate:** 6 digits
Include the cost rate as set by TAMUS. This is used by the SBMR281.

**Sponsor Campus Cd:** 2 digits
Include the campus code for the sponsor table.
The sponsor table is shared by TAMUS members.

**Sponsor Campus Cd:** 2 digits
Include the campus code for the sponsor table.
The sponsor table is shared by TAMUS members.

**Researcher Campus Cd:** 2 digits
Enter the campus code for the researcher.

**User Assign Proposal Format:** 7 digits
Enter the first two digits (usually fiscal year) and FAMIS generates the rest of the number.

**Last Sponsor Number:** 7 digits
Indicates the number of the last sponsor created.

**Last Project Number:** 10 digits
Identifies the last project number automatically assigned by FAMIS system.

**Last Proposal Number:** 5 digits
Displays the number of the last proposal created.

**Last YR Last Proposal Number:** 5 digits
Provides the number of the last proposal for the previous year.

**Proposal Screens:** 3 digits
Enter the screen sequence to be used when a new proposal is added to FAMIS.

**Project Screens:** 3 digits
Include the screen sequence to be used when a new project is added to FAMIS.

## ***Additional Functions***

**PF KEYS:** See the Appendix for explanation of the standard PF keys.

**PF5 Next** **Next**
Goes to the next screen that follows according to information shown on Screen 821.

# Campus Code Change

FAMIS allows you to work in different campuses and various fiscal years, provided you have the appropriate security clearance to do so. To change either the campus and/or the current year use Screen 882.

**Screen 882 –Campus Code Change**

```
882 Campus Code Change                                          02/16/09 10:58
                                                                 FY 2009 CC 02
Screen: ___

                        Active Campus: 02

                   Active Fiscal Year: 2009

                    Valid for Inquiry: ****
                    Valid for Updates: ****

              Active Processing Month: 2_  February
                 Month of Fiscal Year: 6 ↑

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Hmenu Help  EHelp       Next
```

**If you do not have the proper security to change the Active Processing Month, the field will be "display only."**

## Basic Steps

- Enter the desired campus code, fiscal year, and/or processing month in the fields available.
- Press <ENTER> to record the information.

## Field Descriptions (◆ = Required; Help = Field Help Available Using PF2, ? or *)

### *Screen Information*

**Active Campus:** 2 digits
Enter the campus code you are currently accessing.

**Active Fiscal Year:** 4 digits
Displays the current fiscal year that you are accessing. To change, type the desired year and press <ENTER>.

**Valid for Inquiry:** 4 characters
Identifies the data by years you may view as set in your security.

| | | |
|---|---|---|
| CCCC | = | Current year only |
| **** | = | all years |
| YYY | = | a specific year, such as "1996" allows viewing of only 1996 data |
| | | **Generally, this is not recommended.** |

**Valid for Updates:** 4 characters
Identifies the data by years you may update as set in your security.

| | | |
|---|---|---|
| CCCC | = | Current year only |
| **** | = | all years |
| YYY | = | a specific year, such as "1996" allows viewing of only 1996 data |

**Generally, this is not recommended.**

**Active Processing Month:** 2 digits
Allows you to change the processing month for transactions being entered on the FAMIS screens.

**If you do not have the proper security to change this date, the field will be "display only."**

**Month of Fiscal Year:** 2 digits
Displays the current month of the fiscal year.

## ***Additional Functions***

**PF KEYS** See the Appendix for explanations of the standard PF keys.

# Section X
# Appendix

# Instructions

Listed below are general instructions that will make your job easier as you use FAMIS to input or view document information. Please become familiar with the information in this reference as it can make your navigation in FAMIS more efficient.

## 3270 Emulation Keys

Special keys and key combinations must be used when working with FAMIS. These keys are known as 3270 emulation keys and may be defined differently by each 3270 terminal or PC emulation software that you are using. Contact your computer support person if you do not know how to identify the following keys on your computer.

### PF Keys

When a key is listed as **PFn**, "PF" represents Program Function. Many PCs use the function keys labeled **Fn** for these PF keys. Others have special combinations of keys to represent the PF keys, for example, on a Memorex emulation, a combination of the ALT key and the number 1 will represent the ***PF1*** key.

At the bottom of the FAMIS screens, there are PF keys listed that can assist in the use of the screen. For example, at the bottom of Screen 164 (Voucher Inquiry by PO Number) there is a ***PF11*** key with the word "Right" under it. This means that by pressing ***PF11***, the screen listing will scroll to the right for an additional panel of information.

### TAB and BACKTAB Keys

Use the **TAB** and **BACKTAB** keys on a 3270 terminal to move from field to field. This will position the cursor at the start of each field. Most PCs have a key labeled TAB, while the BACKTAB is a combination of the SHIFT/TAB keys.

Using the arrow keys, instead of the TAB keys, to move around the screen may lock the computer keyboard. Use the **RESET** key, then the **TAB** key, to position the cursor and unlock the keyboard.

### CLEAR Key

The **CLEAR** key on many PC keyboards is the **PAUSE** key. This key is often used to clear, or refresh, the screen before typing.

### RESET Key

After pressing <ENTER> to process data information, note the status bar at the bottom of the screen. When the system is processing information, the symbol "**X ( )**" or hour glass icon ( ⌛ ) will appear. You cannot enter additional information until the system is finished processing. If any other symbols appear, press your **RESET** key -- often the **ESCAPE** key on a PC.

**ERASE END OF FIELD Key**

To erase all the information in a field with one stroke, the **ERASE EOF** key on a 3270 keyboard is helpful. For example, a vendor name is held in context when moving from screen to screen. To change to a different vendor, use this key and the current vendor name on the Action Line will be removed. Now the new vendor name can be input. On most PCs, the correct key to use is the **END** key on the numeric keypad.

**HOME Key**

From anywhere on the screen, the most efficient way to take the cursor back to the ***Screen*** field on the Action Line is by pressing certain keys. For the 3270 terminals, the correct combination is the **ALT/RULE** keys. On most PCs, the **HOME** key on the numeric keypad will work.

# Protected Area

The ***Protected Area*** is the area of the screen that will not allow the user to enter information. Typing information in the protected area may freeze the screen. Use your ***reset*** key and then ***tab*** key to release your system when it freezes.

# Action Line/Context

The ***Action Line*** is usually the first line of information on each screen. The ***Screen*** field is used to navigate from screen to screen by entering the number of the screen desired. Fields such as screen, vendor, voucher number, account, etc. are often found on the Action Line.

Data that is entered on the Action Line will be carried in "context" from screen to screen until changed. For example, the GL account number 032365 is entered on the Action Line of the screen below. That account will be carried in "context" until the user keys a different account in the field.

The <**ENTER**> key must be pressed after entering ***Action Line*** data. If a user does not follow this step, all information entered on the screen may be lost and must be re-entered. After pressing <ENTER>, a message will be given at the top of the screen asking for modifications or providing further processing instructions.

```
F0002 Record has been successfully added
002 GL 6 Digit                                          08/01/11 09:17
                                                         FY 2011 CC 02
Screen: ___  Account: 032365 ____ NAVSO, INC

Account Title: NAVSO, INC._____________________    __              SRS: _
```

# Message Line

The line above the Action Line is used to display messages to the user. These messages may be error messages or processing messages, such as the one below.

```
F6537 Please enter a valid six digit GL account
 002 GL 6 Digit                                          01/20/92 11:26
```

# Scrolling Through Data

Pressing <**ENTER**> will scroll through information listed on a screen. On some screens, there are PF keys to use to scroll forward, backward, left and right. These PF keys are displayed at the bottom on the screens with that function.

# Help

HELP functions are available for many screen fields in FAMIS. Typing a question mark (?) in the blank beside the desired field and pressing <ENTER> will access a pop-up window with specified field information. Another way is to place your cursor in the desired field and press ***PF2***.

To get out of the HELP function, either select a value and press <ENTER> or press ***PF4***. The distinction on which key to use will normally be designated in the pop-up window (EX: ***PF4*** = Exit).

# Escaping from a Pop-Up Window

When in a pop-up window, pressing ***PF4*** will usually take you back to the original screen. There are a few screens when pressing <ENTER> will take you back to the original screen.

# Field Help Using the F2 Program Function Key

On selected fields, additional information can be displayed using the ***PF2*** key. This HELP information is accessed by moving the cursor to the field in question and pressing ***PF2***.

For example, place the cursor in the ***Year-end Process*** field and press ***PF2***. The first screen displayed explains the purpose of the field. Sometimes you will be shown the values immediately, without a definition or explanation.

**Screen 2 - GL 6 Digit**

```
   002 GL 6 Digit                                                  08/01/11 09:17
                                                                    FY 2011 CC 02
   Screen: ___  Account: 010100 ____ ED & GEN INCOME-TUITION

 Account Title: ED & GEN INCOME-TUITION_____________                    SRS: _
   Resp Person: 5uuuuuuu4 MASON, MOLLY M              Old Acct: NA_____________
 Year-end Process: F    Reclassify: _  Reporting Group: __  Aux Code: ___
   AFR Fund Group: ?_   Fund Group: FG  Sub Fund Group:      Sub-Sub: __
         Function: __

     Default Bank: 06000      Override: Y      SL Mapped Count: 22
  Alternate Banks: *****  _____  _____  _____  _____  Security: ______

                 Dept  S-Dept Exec Div Coll Mail Cd Stmt
     Primary:    REV__ _____   UN   AD       C6000    N
   Secondary:    VTEA_ _____   AA   CD  VM   C4457    N


 Fund Source: __ ____________________________________________      Account Letter: Y
  Long Title: EDUCATIONAL AND GENERAL INCOME - TUITION      Setup Dt: 08/26/1991
                ____________________________________________
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       Next
```

The first help screen describes the field.

```
Field: FS-MJR-FUND-SRC                  File: IAFRS-GENERAL-SUBSIDIARY-LEDGER

This attribute specifies the major funding source for this account.
i.e. General operation fund, loan funds. This attribute is also used
for roll-up reporting breakdowns by funding source in programs
FBMR046 and FBMR047.
```

Press <ENTER> to display the valid values for the field.

```
|              *** D I C T I O N A R Y - H E L P ***
|
|  VALUES                              MEANING
|  ------------------------------      ----------------------------
|  BLANK                               NOT SPECIFIED
|  01                                  EARNINGS ON ENDOWMENT
|  02                                  GIFTS OR DONATIONS
|  03                                  TRANSFER FROM ANOTHER ACCOUNT
|  04                                  INTEREST ON TIME DEPOSITS
|  05                                  STATE GENERAL REVENUE
|  06                                  AVAILABLE UNIVERSITY FUND
|  07                                  GRANT OR CONTRACT
|
|  Lookup Value / . Menu  ________________________________
|  Rule : IAFRS-FS-MJR-FUND-SRC              Default value is:
|  View : IAFRS-GENERAL-SUBSIDIARY-LEDGER
|  Field: FS-MJR-FUND-SRC
|
|  PF1=Menu PF4=Exit
```

# Question Mark (?) or Asterisk (*) Help

FAMIS has a Help feature on some screen fields that will display a field definition and/or values that may be entered.

To use the Help feature, type a question mark (?) or asterisk (*) in the field and press <ENTER>. If Help is available for the field, a pop-up window will appear displaying a definition and/or valid values. To make a selection, type an "X" next to a value and press <ENTER> to pass it back to the previous screen. This is called the "Passback" feature.

### Screen 204 - Vendor Purchasing Add/Create (Panel 1)

```
  204 Vendor Purchasing Add/Create                                  05/17/12 16:20
                                                                     FY 2012 CC 02
Screen: ___  Vendor: *__________ External VID:          Page: 1  <More>>>>
                                                     Hold:   Freeze:   Delete:
 Name: ____________________________________________________  PIN: ____________ ___
Send New Setup to TINS: _   Send Changes to TINS: _     Tax-ID: __________
*------- Purchasing Bid To -----------* *------ Accounts Payable Remit To ----*
Address: ________________________________ Address: ________________________________
         ________________________________          ________________________________
         ________________________________          ________________________________
         ________________________________          ________________________________
   City: ____________________ State: __    City: ____________________ State: __
    Zip: _____ ____   Country: __           Zip: _____ ____   Country: __
  Phone: ____________     Ext: ____       Phone: ____________     Ext: ____
    FAX: ____________                       FAX: ____________    Zone:
Contact: ____________________________     Contact: ____________________________
-------------------------------------------------------------------------------
Vendor Type: __   Ownership Cd: _      1099: _     W9 Date: __________
     Disadv: _     Ethnic Orig: ___  Gender: _  TAMUS Part: __
   Bus size: _  TAMUS Employee: _  Ck Limit: 0 Retain Mths: 0_
Established:             By:            Modified:             By:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Hmenu Help  EHelp       HUB   Stats NxVn  Notes Order Left  Right
```

### Pop-Up Window with available vendors to select

```
|  F0043 Mark Vendor with an 'X' to select                                  |
|   Screen: ___   Search: ____________________  Type: N (N,V)               |
|                         Include Frz/Del Vendors: N                        |
|                                                                           |
|          Vendor Name                Vendor ID   Alias Frz Del SHld HUB SQ |
| X ACCURA FOOD SERVICES              1vvvvvvvvv1   Y    N   N              |
| _ ADDIE ANSON                       1vvvvvvvvv0   N    N   N              |
| _ ADOSET TECHNOLOGIES COPORATION    1vvvvvvvvv0   N    N   N              |
| _ ADVENGE RENT-A-CAR                1vvvvvvvvv0   N    N   N              |
| _ ARETA LIFE & CASUALTY CO          1vvvvvvvvv0   N    N   N              |
| _ ARETA LIFE & CASUALTY CO          1vvvvvvvvv1   N    N   N              |
| _ ABG PUBLICATIONS                  1vvvvvvvvv1   N    N   N              |
| _ AGGIELAND STONE COMPANY           1vvvvvvvvv1   N    N   N              |
| _ AGGIELAND STONE COMPANY           1vvvvvvvvv2   N    N   N              |
| _ AGGIELAND STONE COMPANY           1vvvvvvvvv3   N    N   N              |
| _ AGGIELAND STONE COMPANY           1vvvvvvvvv4   N    N   N              |
| _ AGGIELAND STONE COMPANY           1vvvvvvvvv5   N    N   N              |
| _ AGGIELAND STONE COMPANY           1vvvvvvvvv6   N    N   N              |
|            ** More Vendors - Press <Enter> to View **                     |
|          PF4=Exit  PF9=Bid  PF10=Remit  PF11=Order  PF12=Main             |
```

After making a selection from the pop-up window of available vendors, you will be returned to the main screen and the information for the selected vendor will be displayed.

**Screen 204 – Vendor Purchasing Add/Create**

```
   204 Vendor Purchasing Add/Create                                 05/17/12 16:25
                      ANN'S CLEANING SERVICE                         FY 2012 CC 02
 Screen: ___   Vendor: 2vvvvvvvvv0 External VID: 00341253  Page: 1  <More>>>>
                                                        Hold: N Freeze: N Delete: N
  Name: ANN'S CLEANING SERVICE_____________________________  PIN: 2xxxxxxxxx7 ___
 Send New Setup to TINS: _   Send Changes to TINS: N     Tax-ID: 4xxxxxxx5
 *------- Purchasing Bid To -----------* *------ Accounts Payable Remit To ----*
 Address: 5777 PRATER WAY_______________ Address: 5777 PRATER WAY_______________
          ______________________________          ______________________________
          ______________________________          ______________________________
          ______________________________          ______________________________
    City: COLLEGE STATION_____ State: TX    City: COLLEGE STATION_____ State: TX
     Zip: 77845 ____   Country: __           Zip: 77845 ____   Country: __
   Phone: _____________     Ext: ____       Phone: _____________     Ext: ____
     FAX: _____________                       FAX: _____________    Zone:
 Contact: ___________________________      Contact: ___________________________
 ---------------------------------------------------------------------------------
 Vendor Type: BU   Ownership Cd: S      1099: _     W9 Date: 02/23/2012
      Disadv: _     Ethnic Orig: ___  Gender: _  TAMUS Part: __
    Bus size: _  TAMUS Employee: _  Ck Limit: 0 Retain Mths: 18
 Established: 02/18/2008  By: THBR02P    Modified: 02/24/2012  By: THBR02P
 Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
       Hmenu Help  EHelp       HUB   Stats NxVn  Notes Order Left  Right
```

# Sponsored Research Screens List


| | | PAGE |
|---|---|---|
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**130** **Cost Sharing Period Maintenance** ..... **VI-6**
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**132** **Cost Sharing Transaction Entry** ..... **VI-11**
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Provides a list of all projects pertaining to a specific sponsor.

**147** **Awards for a Researcher** ..... **V-16**
Provides a list of all awards pertaining to a specific researcher.

**148** **Awards for a Sponsor** ..... **V-18**
Provides a list of all awards pertaining to a specific sponsor.

**150** **Project Summary By Budget Pool** ..... **V-21**
Provides a project summary by budget pool.

**151** **Project Indirect Cost Assessed** ..... **V-24**
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**152** **Account Summary for a Project** ..... **V-26**
Displays summary information about a project for each account associated with the project.

**153** **Revenue for a Project** ..... **V-29**
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**154** **Accounts for a Project** ..... **V-31**
Displays all the accounts and account information pertaining to a specific project.

**155** **User Defined Category Maintenance** ..... **V-34**
Used to inquire and update the user-defined budget allocation pools.

**156** **Project Summary by Target Budget** ..... **V-36**
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**158** **SL/SA Summary for a Project by Budget Pool** ..... **V-40**
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**190** **Project Delete** ..... **IV-66**
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**191** **Award Delete** ..... **IV-68**
Used to delete an award from SPR.

**192** **Sponsor Delete** ..... **II-17**
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**801** **Indirect Cost Table** ..... **VIII-4**
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**802** **Indirect Distribution Table** ..... **VIII-6**
Used to define valid indirect cost distribution.

**804** **Federal Domestic Assistance (CFDA) Table** ..... **VIII-8**
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**807** **Award Estimates by Department Table** ..... **VIII-14**
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**808** **Proposal Estimate by Department Table** ..... **VIII-16**
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**809** **Keyword Table Maintenance** ..... **VIII-18**
Used to maintain keyword information.

**815** **Coordinating Board Code Table** ..... **VIII-10**
Lists the codes for the Coordinating Board Code.

**816** **Letter of Credit Table** ..... **VIII-12**
Defines valid letters of credit.

**821** **Control Record Maintenance** ..... **IX-3**
Used to control institution information of SPR system.

**850** **Person Information** ..... **VIII-20**
Used to enter a new researcher into FAMIS.

**860** **Department Table Maintenance** ..... **VIII-24**
Used to maintain departmental information.

**882** **Campus Code Change** ..... **IX-5**
Used to change the campus code to view records of another institution or year.

**M10** **SPR Project Proposal Transfer Menu** ..... **I-9, III-3**
Lists the available project/proposal transfer screens to use the SPR application functions.

**M11** **SPR Project Maintenance Menu** ..... **I-10**
Lists the available project maintenance screens to use the SPR application functions.

**M12** **SPR Project Inquiry Menu** ..... **I-10, V-3**
Lists the available project inquiry screens to use the SPR application functions.

**M13** **SPR Cost Sharing Menu** ..... **I-11, VI-3**
Lists the available cost sharing maintenance and inquiry screens to use the SPR application functions.

**SO1** **SPR System Table Menu** ..... **I-11, VIII-3**
Lists the available system table screens to use the SPR application functions.

# Standard PF Keys

PF Keys are used in FAMIS to access additional information. Wherever possible the same assignment has been given to the same PF key, such as PF2 always being the key used for HELP. Occasionally this has not been possible and a different assignment has been made.

The following list is to help you identify the functionality behind the PF keys that you will see on the many screens in the purchasing modules of FAMIS.

Many screens have extended information windows assigned to various function keys that are designated at the bottom of each screen and pop-up window. Placing the cursor (using the cursor arrow keys) on a particular line and pressing the extended information function key will display the pop-up window information for the document or item on that line.

Typically, exiting a pop-up window is done by pressing ***PF4*** to return to the previous window or inquiry screen. If multiple windows have been opened pressing ***PF3*** will return you directly to the screen where you started.

From within many of the pop-up windows an additional set of extended function keys may appear to further inquire on the document or item.

## Extended Function Keys

**EHelp** **Not Used in FAMIS**

**Help** **On-Line Help**
On selected fields, additional information may be displayed. This information is accessed by moving the cursor to the field in question and pressing the ***PF2*** key for Help. The first screen accessed will describe the field; pressing <ENTER> will display any valid values available for the field (see below).

```
DESCRIPTION:  AN INSTITUTIONALLY DEFINED CODE THAT GROUPS CURRENT FUND
EXPENDITURES ACCORDING TO THE PURPOSE FOR WHICH COSTS WERE INCURRED.
```

```
+-----------------------------------------------------------------+
|                                                                 |
|              *** D I C T I O N A R Y - H E L P ***              |
|                                                                 |
|  VALUES                            MEANING                      |
|  --------------------------------  ---------------------------- |
|  AS                                ACADEMIC SUPPORT             |
|  AX                                AUXILIARY                    |
|  BLANK                             NOT SPECIFIED                |
|  IN                                INSTRUCTION                  |
|  IS                                INSTITUTIONAL SUPPORT        |
|  PL                                OPERATION & MAINT OF PLANT   |
|  PS                                PUBLIC SERVICE               |
|  RR                                MAJOR REPAIRS & REHABILITATIO |
|                                                                 |
|  Lookup Value / . Menu  ________________________________        |
|  Rule : IAFRS-FG-FS-PURP                 Default value is:      |
|  View : IAFRS-GENERAL-SUBSIDIARY-LEDGER                         |
|  Field: FG-FS-PURP                                              |
```

| | |
|---|---|
| **HMenu** | **Not Used in FAMIS.** |
| **Left** | **Scroll Screen Left**<br>Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the **left**. |
| **Print** | **Print Account Information**<br>Used to print account information from FAMIS using Entire Connection. See the FAMIS Entire Connection for Windows User's Manual for greater detail. |
| **Right** | **Scroll Screen Right**<br>Some windows are made up of several adjacent panels. These will be designated by the word **Panel: ##** appearing in the window. Pressing this key scrolls the panel to the **right**. |

# Glossary

## A

**ABR**

See Automatic Budget Reallocation.

**ABR Pool Table**
A user-defined table assigning rules for budget pools and the subcode ranges participating in each pool.

**Account**
A functional unit, identified by an account ID that serves a particular accounting purpose where one person has primary responsibility for it. Accounts include balance sheets (GL) and revenue/expenditure accounts (SL). A building (in the Plant Funds area) is an example of a General Ledger account and the President's Office is an example of a Subsidiary Ledger account.

**Account Control**
The last four digits in the ten-digit account number for a General Ledger account. The account control designates a specific asset, liability, fund balance, fund addition, fund deduction or summary control.

**Account ID**
A 6-digit identification number for an account.

**Account Number**
A 10-position ID within the master file of the Financial Records System. The first 6 positions identify the specific account while the last four positions identify the account control for a balance sheet account (GL) and the object code for a revenue or expenditure account (SL).

**Accounts Payable**
An application of the Financial Records System (FRS). AP processes vendor payments and keeps track of financial activity involving vendors.

**Action/Context Line**
The screen line (usually fourth from the top) or lines where the screen to be accessed and the key of the data to be addressed are input and displayed.

**Alias**
A commonly used name for a vendor, other than the formal customer name (primary name) that prints on the check. The Purchasing System also offers a commodity alias name and permits you to define any number of alias names, once a vendor has been created.

**AP**
See Accounts Payable.

**Attributes**
Descriptive data associated with a record. Examples are school, department, function, name and responsible person. Attributes support a variety of sophisticated reporting techniques.

**Automatic Budget Reallocation (ABR)**
When transactions are entered, a process by which the system automatically transfers budget dollars from predefined budget pools to specific object codes.

## B

**Bank Transfer**

A movement of cash from one bank account to another. This allows expenditures at specific object codes to share in a single pool of money.

**Batch/Session**
A collection of related transactions input to the system with a header record and control totals, usually prepared by one person or subsystem feed.

**Batch Interface**
A type of interface where one system generates transactions to be batched for input into another system.

**BBA**
See Budget Balance Available.

**Beginning Balance**
Balances posted during implementation.

**Budget**
A plan of revenue and expenditures for an accounting period expressed in monetary terms.

**Budget Balance Available (BBA)**
That portion of budget funds that is unspent and unencumbered.

**Budget Fiscal Year**
Budgets are prepared in one fiscal year for the next fiscal year. The default is always the next fiscal year when using any Budget Preparation screen.

**Budget Pattern**
Used to group individual object codes (or ranges), into budget categories to establish new fiscal year budget. Tracks current and past year account activity in order to develop the new fiscal year budget.

**Budget Pool**
A budget summarized at significant levels of revenue or expense. A single pool of money defined for use by specific object codes.

**Budget Version**
Various versions of a budget can be created and names for comparative purposes.

**Buying Account**
Account which is allowed to "purchase" from a specific selling account via an interdepartmental transfer.

## C

**Capital**
Assets, cash, means, property, resource.

**Cash**
Coins, currency, checks, and anything else a bank will accept for immediate deposit.

**Cash Disbursement**
A non-vouchered payment for goods received, services rendered, reduction of debt or purchase of other assets.

**Cash Receipt**
Cash received from cash sales, collections on accounts receivable and sale of other assets.

**Chart of Accounts**
A listing, at the 6-digit level, of all account numbers within FAMIS. Sometimes the COA defines the accounts at the 10-digit level as well.

**Check Override**
The capability to bypass, on an individual-voucher basis, controls that were previously set for all vouchers.

**Claim-On-Cash**
The share of ownership that an account has in the institution's money.

**Clearing Account**
A temporary summary account (such as a payroll account) which is periodically set to zero.

**COA**
See Chart of Accounts.

**Compound Journal Entry**
A two-sided transaction that posts debits and credits.

**Context**
The information that identifies the record being displayed or to be displayed by the system.

**Copy**
The process that creates a new pattern from an existing version (specified on the Action Line) or ABR (specified in the resulting pop-up screen).

**Credit Memo**
The reduction of a payable previously paid or still open. A credit memo may result from overpayment, overbilling, or the return of goods.

**Currency Code**
A code that identifies a record in the Tax Currency Table. This record provides the factor to calculate foreign currency conversion costs or gains and the liability account used. The code is translated through a table into a conversion rate.

**Cycle**
Two or more programs that are run in a specific sequence.

# D

**Data**
Data are representations, such as characters, to which meaning might be assigned. They provide information and can be used to control or influence a process. This term is not synonymous with information. Information is data to which meaning has been assigned.

**Database**
The collected information that is accessible to the computer for processing.

**Data Control**
The tracking of input, processing and output, and the comparing of actual results to expected results in order to verify accuracy.

**Data Element HELP**
An on-line feature that assists the user by providing immediate information about any particular field on a screen.

**Data Entry**
A means for adding information into the system.

**Default**
The value that the system will assign if no other value is entered.

**Default Mandatory**
Flag indicating whether the transfer is mandatory. If no value is entered in the detail lines for this field, the transfer will be flagged with the default value after pressing <ENTER>.

**Delete Flag**
A data element whose condition signifies that a document will be permanently removed from the database during the next archive cycle.

**Demand Voucher**
Voucher to be paid during the next Check Cycle.

**Diagnostic Message HELP**
An on-line feature that assists the user with data entry by providing an explanation of a message and the appropriate action to take.

**Diagnostics**
The messages that describe the results of processing. These messages may indicate an error and provide information about a process by noting what action to take to correct the error.

**Digit 3 of TC**
The third digit of the Transaction Code (Entry Code) which specifies the type of transaction.

**Disbursement**
Record money paid out by the institution from GL, SL and SA or bank account. Can reverse an encumbrance. A payment for goods received, services rendered, reduction of debt or purchase of other assets that does not go through the AP/voucher system.

**Discount Account**
The account credited for discounts taken by the system when a check is written.

**Discount Table**
A table containing user-defined values representing discount terms for vendors.

**Dollar Data**
A record of the dollar amount and the type of financial transactions posted to an account.

**Dollar Limit**
A code used in Accounts Payable to specify a check amount. If the amount of a vendor's check is greater than this value, the check will not be generated.

**Drop Flag**
A data element whose condition signifies that a document is to be removed from the database immediately.

## E

**Encumbrance**
An obligation incurred in the form of a purchase order or contract. Also referred to as an open commitment.

**Endowment**
Funds received by an institution from a donor who specifies the condition that the principal not be spent.

**Endowment Income**
The income generated by investing the principal of an Endowment Fund.

**Entry Code**
The initial three-digit code on a transaction that denotes the transaction type. This code, which is mandatory for all FRS transactions, is predefined by the system. It is also known as the Transaction Code.

**Expended**
Depleted, used up.

**Expense**
Cost, disbursement, payments.

# F

**FA**
See Financial Accounting.

**Feed**
Transactions from other systems that are transferred to the FRS.

**Field**
That part of a control record, transaction or established for displaying or entering information.

**File**
A storage area established within a computer system or database for organizing similar kinds if data.

**Financial Accounting (FA)**
A Financial Records System application that balances the General and Subsidiary ledgers while providing a complete audit trail of all transactions.

**Financial Records System (FRS)**
A system that supports the financial record-keeping and reporting of a college or university.

**Flag**
A data element used to set controls or conditions on a process or program.

**Freeze Flag**
A data element whose condition signifies that new transactions cannot be posted. This includes no feeds or invoice postings for this document.

**FRS**
See Financial Records System.

**FTE**
Full-time Equivalents. Used by the B/P/P System.

**Function**
Purpose.

**Fund**
An accounting entity (a 6-digit GL account) with a self-balancing set of 10-digit accounts for recording assets, liabilities, a fund balance and changes in the balance.

**Fund Balance**
The equity of a fund (the difference between assets and liabilities).

**Fund Group**
A related collection of funds (6-digit GL accounts). Examples include Current Unrestricted, Current Restricted, Loan, Endowment, Annuity and Life Income, Plant, and Agency.

**Fund Group ID**
A one-digit identification number representing the fund group with which an account is associated.

**Fund Transfer**
A movement of dollars from one fund balance to another.

## G

**General Ledger (GL)**
A balance sheet account for the institution. All GL account numbers begin with "0" (zero).

**GL**
See General Ledger.

**GL/SL Relationships**
User-defined structures relating Subsidiary Ledger (SL) revenue/expense accounts to General Ledger (GL) fund accounts.

**Global Subcode Edit (GSE)**
A system edit that checks each new 10-digit account against a table that specifies valid combinations of 6-digit accounts and subcodes.

**GSE**
See Global Subcode Edit.

## H

**Header**
That portion of a Purchasing document containing basic information such as the document's number, the date and amount.

**HEAF**
Indicates a Higher Education Assistance Fund code number.

**HELP**
An online feature which accesses PREDICT in order to supply descriptions, valid values and suggested actions.

## I

**IDT**
Interdepartmental Transfer.

**Indirect Updating**
The automatic posting of real dollar activity to a GL Balance Sheet account as a result of a direct transaction.

**Inquiry Screen**
A screen which only displays information and cannot be used for entering data.

**Interface**
A communication link between data processing systems or parts of systems that permits sharing of information.

**Interfund Borrowing**
The transfer of an asset or liability from one fund to another.

## J

**JCL**
See Job Control Language.

**Job Control Language (JCL)**
A problem-oriented language, used in IBM that expresses the statements of a processing job. It is also used to identify the job or describe its requirements, usually to an operating system.

**Journal Entry**
A non-cash transfer of dollars between two or more accounts.

## L

**Ledger**

A collection of account records for an organization. FRS contains two ledgers: the GL (balance sheet) and the SL (revenue and expense). See also General Ledger and Subsidiary Ledger.

**Liability Account**
In AP, a GL account that is credited for the liability when a voucher is processed. Any GL account that accepts a transaction creating a liability.

**Liquidate**
Reduce encumbrance through payment; pay off debt.

## M

**Map Code**

A five-digit attribute code in an SL account indicating the GL Fund ID to which it relates.

**Mandatory**
Flag indicating whether the transfer is mandatory. If no value is entered in the detail line(s) for this field, the transfer will be flagged with the default value after pressing <ENTER>.

**Memo Bank Account**
An account that represents the balances of demand deposits for operating accounts.

**Menu**
A screen containing a list of available processes, screens or other menus.

## N

**Name Rotation**

A feature that allows users to print a vendor name in one format on checks and then rotate it to another format for sorting on reports.

## O

**Object Code**

A four-digit number identifying specific items of revenue/expense or attribute records.

**Open Commitment**
An encumbrance.

## P

**Parameter**

A variable that is assigned a constant value for a specific purpose or process. It provides the user with defined choices for report selection, processing or output requirements.

**Purpose**
The function.

## R

**Receipts**

Cash received from cash assets, collections on account receivable and sale of other assets. The purpose is to record money received by the institution to the GL, SL and SA or bank accounts.

**Recommendation**
The budget projection version that is submitted to the Budget Office for approval.

**Regular Order**
A type or purchase order that denotes a typical order.

**Remit-To Address**
The address to which the check for goods and/or services rendered will be sent.

**Requisition**
A type of document that internally requests goods and/or services to be acquired. It must be authorized before being converted to a purchase order.

**Retention Months**
A data element defined when creating a vendor. This indicates the number of months a vendor is to be maintained on file after all outstanding items have been paid or reconciled.

**Revenue**
Income or receipts.

**Run Parameter**
A parameter from a control record or a program control transaction (as opposed to a file maintenance transaction).

# S

**Save**
The process that creates a budget version.

**6-Digit Account**
For GL: An entity that consists of a self-balancing set of 10-digit accounts.
For SL: An entity of revenues and/or expenses

**Screen HELP**
An on-line feature that assists the user with data entry by providing information on the purpose and operation of a particular screen.

**Secondary Vendor**
The vendor record holding the multiple addresses that are used periodically, as opposed to the primary address.

**Secured Submitted Version**
Submitted budget version that has been locked. It can be flagged to indicate it is an "official" version.

**Selling Account**
Account which is allowed to "sell" to specified buying accounts via interdepartmental transfers.

**Session**
A control mechanism to track real-time posting of a group of financial transactions is order to provide an audit trail.

**SL**
See Subsidiary Ledger.

**Split Encumbrance**
An encumbrance which applies to several accounts.

**Standing Order**
A type of purchase order used for reoccurring services like those provided by the telephone and electric companies.

**Subcode**
Four digits appended to the account ID to identify attributes and dollar records within an account.

**Submit**
The process that attached a budget version to a budget account as a budget of an account.

**Submitted Version**
Version of the budget submitted for approval as the official budget of an account.

**Subsidiary Ledger**
Revenue and expenditure accounts for the institution. All SL account numbers begin with a ledger number of 1 through 9.

**Suspense Account**
A GL clearing account reflecting real dollar activity directed to the Suspense File.

# T

**1099 Vendor**
A vendor (usually a consultant or professional service hired by an institution) whose payments must be reported to the IRS on Form 1099.

**1099 Voucher**
A voucher that must be reported to the IRS on Form 1099.

**10-Digit Account**
The six-digit account ID combined with the four-digit subcode, i.e. an account control or object code.

**Tax Code**
A code that identifies a record in the PO Tax Table (for the Purchasing System) and in the Tax Currency Table (for Accounts Payable). The code must be the same for both tables. This record contains the tax percentage and the tax liability account to be used.

**Tax ID**
A Social Security Number or Federal Employer Identification Number that is available for 1099 report preparation.

**Taxes**
An additional charge on the acquisition of goods that is imposed by the taxing authority and should be paid with the invoice.

**Temporary Vendor**
A vendor from whom only one purchase or service is required. No further transactions, for this vendor, are expected.

**Transaction Code**
A three-digit code that uniquely identifies a transaction type and determines editing criteria and dollar fields to be updated.

# U

**Update Screen**

A screen that allows a user to enter data for updating the files.

# V

**Valid Value**

A value of a data element that has been defined for input.

**Value-Based**
A mechanism used to restrict operator access to information by comparing operator security authorization with the value stored in the field.

**Vendor**
A provider of goods and/or services.

**Vendor Addresses**
See Order-From Addresses and Remit-To Addresses.

**Vendor Automatic**
A feature that automatically assigns a specific Number Assignment to the vendor on the Action/Context Line.

**Vendor Commodity**
A good or service purchased from a specific vendor.

**Vendor File**
A record of all attributes, dollar data, and control information for all vendors.

**Version**
Account Budgets created by departments. These can later be submitted as the budget recommendation for the account. Once a version is locked, it will be called a "secure version" and can never again be changed.

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