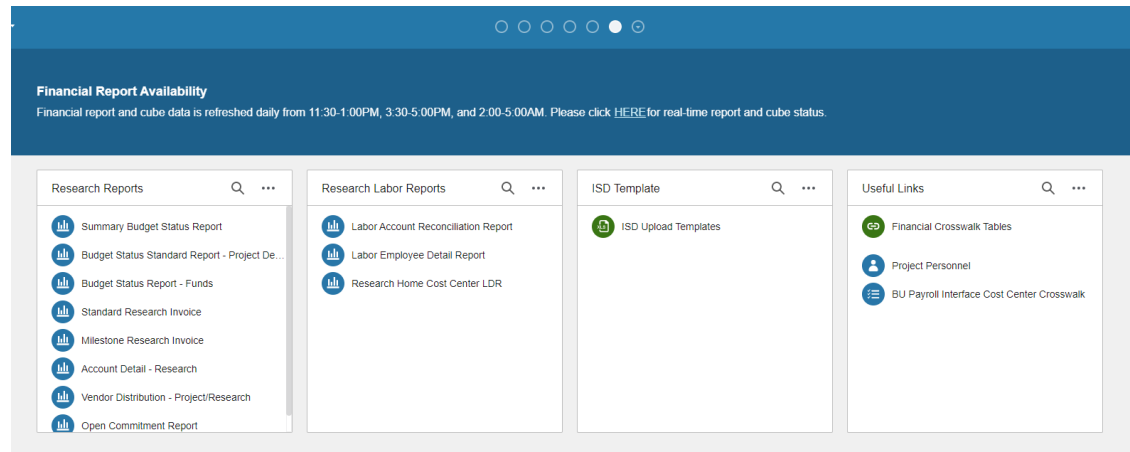


Contents

- Introduction to Research Homepages
 - Access to Infor and reporting
 - Adding the homepage
 - Report Availability
 - Troubleshooting
- Research Homepage Reports
 - Report Navigation
 - Budget Status Report – Project Detail
 - Standard Research Invoice
 - Milestone Research Invoice
 - Account Detail
 - Vendor Distribution
 - Open Commitment Report
 - Labor Account Reconciliation
 - Labor Employee Detail Report
 - Research Home Cost Center
- Useful Links
 - Crosswalks
 - Project Personnel



Goals of Training

- Understand how access works and who can help with new users or modifying existing user access
- Know who to contact when you have a reporting issue
- Learn how to run and read reports in Infor for sponsored programs

Introduction to Research Homepages

Access to Infor and Reporting

- Financial Information Systems (FIS) team manages access to Infor
 - New users must have a BMC network login and profile in Workday
- FIS has a [form](#) for new user access and modifications to existing users' access
 - You **should** request access to Research Homepage
 - You **do not** need to request access to specific projects on this form

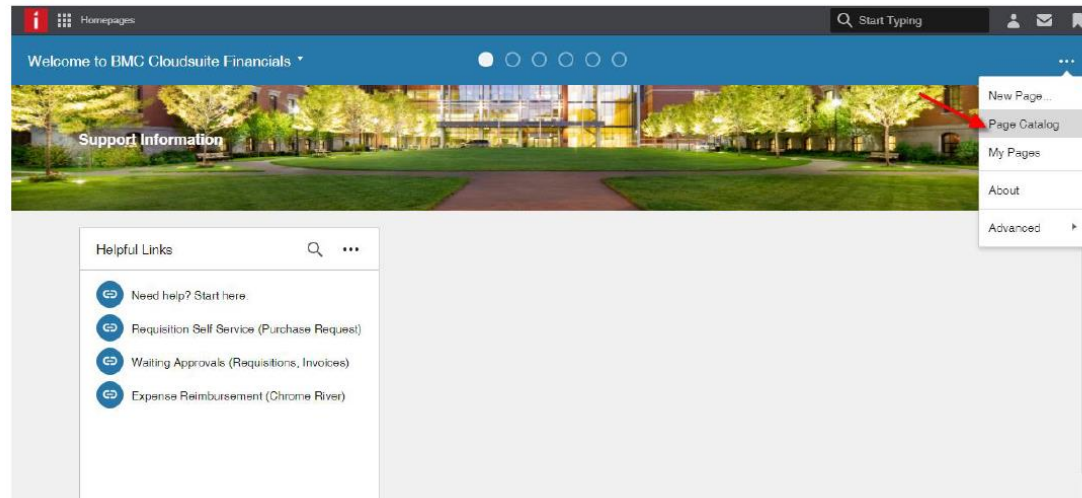
Once you have access to the Research homepage...

Complete RIS [form](#) for updating access to specific projects

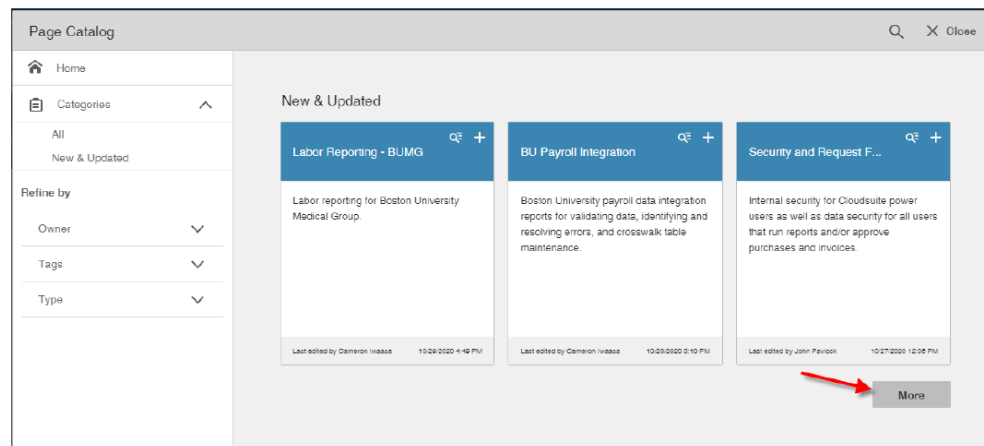
Adding Research Home Page to Infor Screen

To add research reports to your Infor Homepages:

1. Navigate to the Page Catalogue

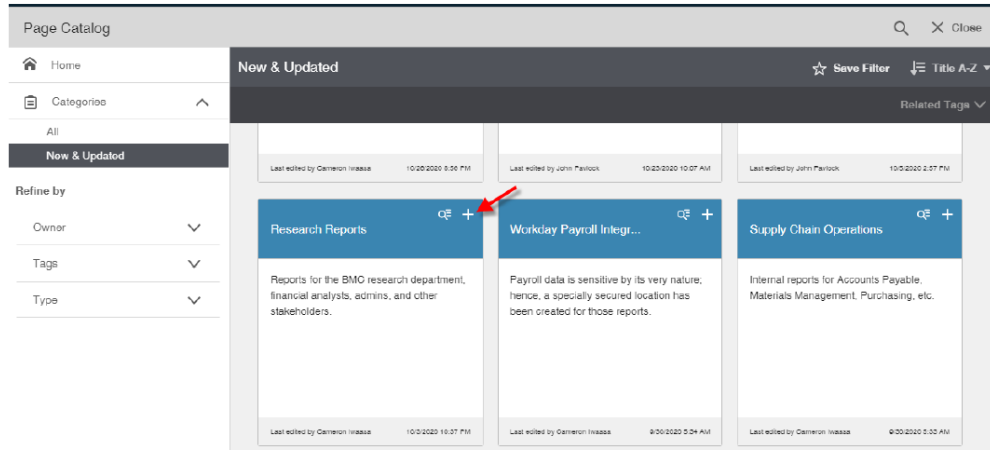


2. Select 'More' to see all page options

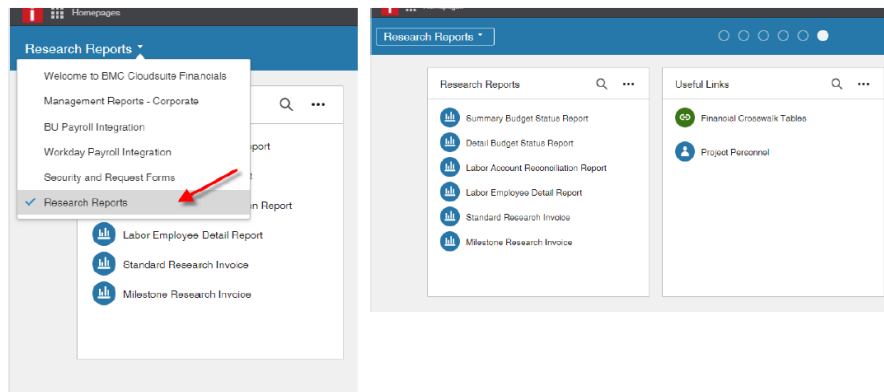


Adding Research Home Page to Infor Screen

3. Locate Research Reports and click the '+' to add it to your homepages. You can close the window after adding Research Reports



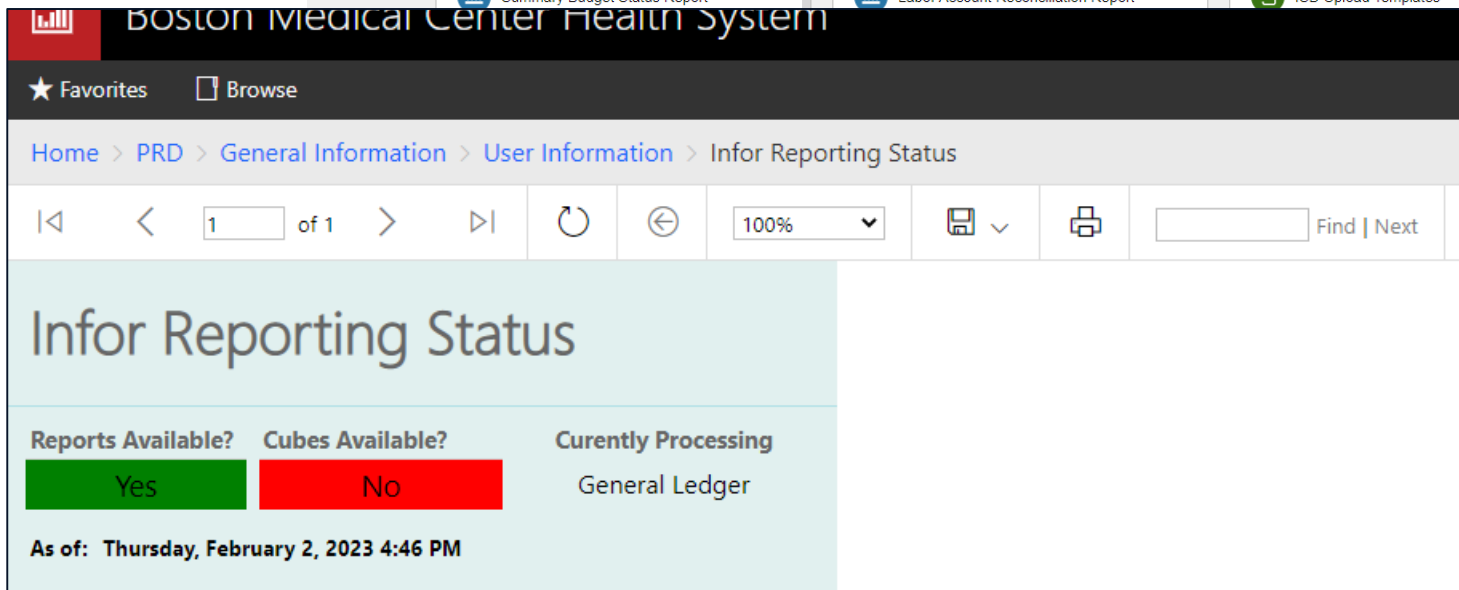
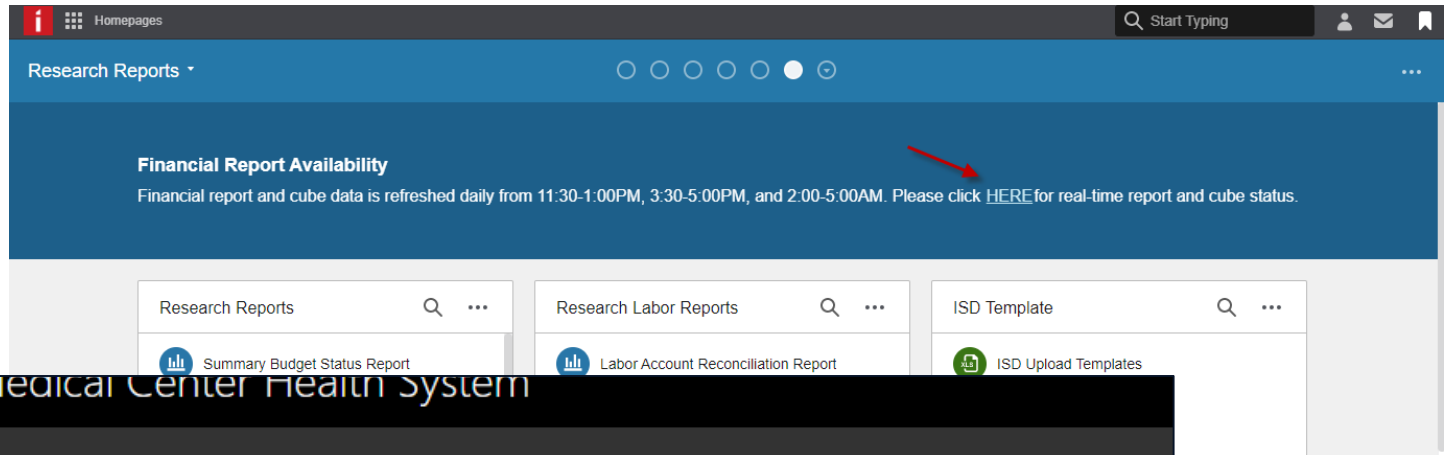
4. The research reports will appear as one of your homepages. You can navigate to them via the drop-down menu



Report Availability

There are two midday refreshes that will cause delays or make reports unavailable

- **11:30-1:00**
- **3:30-5:00**



Troubleshooting Reporting Issues

For **financial data discrepancies** please contact your Research Finance Analyst or Clinical Trial Financial Analyst to investigate

For **technical issues, unexpected changes in access, or if you receive an error screen** when running reports, please open a [ServiceNow](#) FIS ticket for support

Research Homepage Reports

Report Navigation

The screenshot shows a report navigation toolbar and header. The toolbar includes navigation arrows (labeled 2), a page number input box (labeled 3) showing '6 of 7', a refresh button, a back button, a zoom dropdown (100%), a save button (labeled 4), and a print button. A search box (labeled 1) is located to the right of the toolbar, with 'Find | Next' labels. The report header displays 'Boston Medical Center HEALTH SYSTEM' and 'Research Account For 12/1/2022 Thru'. Below the header is a table with columns: Post Date, Fiscal Pd, Sys, Jrnl #, Line #, Event, Project, and PName. The table contains two rows of data for Frederick Ruberg. To the right of the table, a dropdown menu is open, showing options: Word, Excel, Excel (No Header), and a partially visible 'with nuclear imag' option.

Post Date	Fiscal Pd	Sys	Jrnl #	Line #	Event	Project	PName
12/31/2022	202303	PS	1949	771	IB	4300381004	Frederick Ruberg
12/31/2022	202303	PS	1949	772	IB	4300381004	Frederick Ruberg

1. Search For Text - Search within the report by entering the search text in the box to the left of the “Find | Next” label above the report header and clicking Find. Subsequent instances of the search text may be found by clicking on the Next label.
2. Page Ahead/Back - You can use the arrows on the left-hand side to move forward or back a single page and go to the beginning or end of the report.
3. Go to Page - Type in the page number in the box to go directly to that page.
4. Report Copy/Export Data - To keep a copy of the report you can either save or print the report. When saving the report, you can use many popular formats including Excel, PowerPoint, PDF, XML, web archive and image (TIFF). Excel (No Header) will export the file without merged columns

Budget Status Report (BSR) – Project Detail

The screenshot displays a web application interface for Research Reports. At the top, there is a navigation bar with a search icon and the text "Start Typing". Below this, a blue header bar contains the text "Research Reports" and a series of circular indicators. The main content area features a blue banner with the title "Financial Report Availability" and a message stating: "Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status." Below the banner, there are three panels. The first panel, titled "Research Reports", contains a list of reports with the "Budget Status Standard Report - Project De..." highlighted in yellow. The second panel, titled "Research Labor Reports", contains a list of labor-related reports. The third panel, titled "ISD Template", contains a single item "ISD Upload Templates".

Homepages

Search Start Typing

Research Reports

Financial Report Availability
Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.

Research Reports

- Summary Budget Status Report
- Budget Status Standard Report - Project De...**
- Budget Status Report - Funds
- Standard Research Invoice
- Milestone Research Invoice
- Account Detail - Research
- Vendor Distribution - Project/Research
- Open Commitment Report

Research Labor Reports

- Labor Account Reconciliation Report
- Labor Employee Detail Report
- Research Home Cost Center LDR

ISD Template

- ISD Upload Templates

Budget Status Report (BSR) – Project Detail

Purpose: shows specific periods or annual expenses, total project-to-date expended amounts, and open encumbrances compared to budget amounts to determine the status and amount of the budget balance. The reports are typically run following Month End Close.

Boston Medical Center Health System

★ Favorites Browse

Home > PRD > Research Budget Status Standard Report - Project Detail

DateBegin DateEnd Project <Select a Value> View Report



1 2 3 4







<Select a Value>
4100000001-Oxygen Study, METRC: The Major Extremity Trauma Research Con
4100001001-PrEPception: Expanding Assisted Reproduction Options for Ser
4100002001-STREAM Study: Streamlining Trauma Research Evaluation

1. Begin Date – No default, enter or select the beginning date of the transactions to be viewed.
2. End Date – No default, enter or select the ending date of the transactions to be viewed.
3. Project [Number-Description] – The dropdown allows the selection of a single Project.
4. View Report: Click the View Report Button to run the report.

Budget Status Report (BSR) – Project Detail

Home > PRD > Research > Budget Status Standard Report - Project Detail

DateBegin  DateEnd  Project

1 of 1     100%   Find | Next

Boston Medical Center
HEALTH SYSTEM

Budget Status Report
Project Detail
From 12/1/2022 to 12/31/2022

Project: 4300024011
Source Funding: CITY-FED_PASS
Status: RO-AC
Pay Type: CostReimbursement
PI: Eileen O'Brien
Fringe Rate: 34.3%

Originating Sponsor: DHHS-Administration on A
Direct Sponsor: CITY OF BOSTON
RFA: Parikh, Hiral
Admin: Kip Langelo
Project Period: 10/1/2020 - 9/30/2022
Project Budget: 0.00%

Account Desc Full	Post Date	Reference	Budget	Posted Exp	Exp to Date	Encumbrance	Balance
Total Direct Cost			\$28,000.00	\$2,462.27	\$39,743.82	\$0.00	(\$11,743.82)
Total Costs			\$28,000.00	\$2,462.27	\$39,743.82	\$0.00	(\$11,743.82)

Run by BMC\MIPORREC 2/3/2023 9:46:47 AM Page 1 of 1

1. The General Ledger detail account description
2. Post Date – Date the transaction was posted to the GL
3. Posted Exp – Total expenses for the period selected
4. Budget – The total budget amount for the Department/Section/Program/Project.
5. Exp to Date – All expenses for the selected project
6. Encumbrance – The total budget amount currently set aside through the encumbrance process for the Department/Section/Program/Project. It is used to identify budget amounts that have been committed but not spent yet. It is used to calculate the uncommitted amount of budget remaining.
7. Balance – The budget amount that is left to spend on the project. This is calculated by taking the total budget amount and subtracting the total expense amount posted to date and the current encumbrance balance for the Section/Program/Project(s) selected.

Budget Status Report (BSR) – Project Detail

[Home](#) > [PRD](#) > [Research](#) > Budget Status Standard Report - Project Detail

DateBegin	<input type="text"/> 12/1/2022		DateEnd	<input type="text"/> 12/31/2022		Project	<input type="text"/> 4300024011-Title IIIB - Elders Living at Home
-----------	--------------------------------	--	---------	---------------------------------	--	---------	--

<<	<	1 of 1	>	>>	↺	↻	⏪	100%	📁	🖨️	<input type="text"/>	Find Next
----	---	--------	---	----	---	---	---	------	---	----	----------------------	-------------

Boston Medical Center HEALTHCARE	<h2>Budget Status Report</h2> <h3>Project Detail</h3> <p>From 12/1/2022 to 12/31/2022</p>	Project: 4300024011 Source Funding: CITY-FED_PASS Status: RO-AC Pay Type: CostReimbursement PI: Eileen O'Brien Fringe Rate: 34.3%	Originating Sponsor: DHHS-Administration on Aging Direct Sponsor: CITY OF BOSTON RFA: Parikh, Hiral Admin: Kip Langello Project Period: 10/1/2020 - 9/30/2022 Project Burden Rate: 0.00%
--	---	--	---

Account Desc Full

Total Direct Cost

Total Costs

Run by BMC\MIPORREC

2/3/2023 9:46:47 AM

DateBegin12/1/2022

DateEnd12/31/2022

Project4300024011-Title IIIB - Elders Living at Home

Navigation icons: Previous, First, 1 of 1, Next, Last, Refresh, Back, Zoom (100%), Save, Print, Find | Next

Boston Medical Center
HEALTH SYSTEM

Budget Status Report
Project Detail

From 12/1/2022 to 12/31/2022

Project: 4300024011

Source Funding: CITY-FED_PASS

Status: RO-AC

Pay Type: CostReimbursement

PI: Eileen O'Brien

Fringe Rate: 34.3%

Originating Sponsor: DHHS-Administration on Aging

Direct Sponsor: CITY OF BOSTON

RFA: Parikh, Hiral

Admin: Kip Langelo

Project Period: 10/1/2020 - 9/30/2022

Project Burden Rate: 0.00%

Account Desc Full	Post Date	Reference	Budget	Posted Exp	Exp to Date	Encumbrance	Balance
<input type="checkbox"/> Total Direct Cost			\$30,000.00	\$3,463.37	\$3,713.93	\$0.00	(\$4,173.93)
<input type="checkbox"/> Salaries and Wages							
<input type="checkbox"/> Fringe Benefits							
Total Costs							
Run by BMC\MIPORREC	2/3/2023						

Boston Medical Center

HEALTH SYSTEM

Budget Status Report

Project Detail

From 6/1/2021 to 6/30/2021

Project: 4300024011

Source Funding: CITY-FED_PASS

Status: RO-AC

Pay Type: CostReimbursement

PI: Eileen O'Brien

Fringe Rate: 32.5%

Originating Sponsor

Direct Sponsor

RFA

Admin

Project Period

Project Burden Rate

Boston Medical Center
HEALTH SYSTEM

Budget Status Report

Project Detail

From 6/1/2021 to 6/30/2021

Project: 4300024011
 Source Funding: CITY-FED_PASS
 Status: RO-AC
 Pay Type: CostReimbursement
 PI: Eileen O'Brien
 Fringe Rate: 32.5%

Originating Sponsor: DHHS-Administration on Aging
 Direct Sponsor: CITY OF BOSTON
 RFA: Pezzone, Kristin
 Admin: Kip Langello
 Project Period: 10/1/2020 - 9/30/2022
 Project Burden Rate

Account Desc Full	Post Date	Reference	Budget	Posted Exp	Exp to Date	Encumbrance	Balance
<input checked="" type="checkbox"/> Total Direct Cost			\$40,000.00	\$1,507.53	\$2,261.30	\$0.00	\$37,738.70
<input checked="" type="checkbox"/> Salaries and Wages							
<input checked="" type="checkbox"/> 510010-Salaries-Base						\$0.00	
<input checked="" type="checkbox"/> 510080-Salaries-Earned Time						\$0.00	
Employee Name	6/1/2021	Holiday PTO					
<input checked="" type="checkbox"/> Fringe Benefits							
<input checked="" type="checkbox"/> 520130-Fringe Expense						\$0.00	
MONTHLY FRINGE-FRINGE 32.5	06/30/2021						
MONTHLY FRINGE-FRINGE 32.5	06/30/2021						
Total Costs			\$40,000.00	\$1,507.53	\$2,261.30	\$0.00	\$37,738.70

Click on the Reference Link to go to the Labor Employee Detail Report.

Budget Status Report (BSR) – Project Detail

Boston Medical Center HEALTH SYSTEM		Budget Status Report Project Detail From 5/1/2022 to 5/31/2022		Project: Source Funding: INDUSTRY Status: RO-AC Pay Type: Milestone PI: Fringe Rate: 32.5%		Originating Sponsor: N/A Direct Sponsor: RFA: YIN, MINHAO Admin: Project Period: 4/23/2020 - 4/22/2023 Project Burden Rate 30.00%	
Account Desc Full	Post Date	Reference	Invoiced	Posted Exp	Exp to Date	Encumbrance	Balance
+ Invoiced			\$348,648.55	\$0.00	\$0.00	\$0.00	
+ Total Direct Cost				\$17,776.95	\$113,747.82	\$0.00	
+ Total Indirect Cost				\$5,333.09	\$30,833.30	\$0.00	
+ Reporting Offsets				\$0.00	\$0.00	\$0.00	
Total Costs			\$348,648.55	\$23,110.04	\$144,581.12	\$0.00	\$204,067.43

"Invoiced"
Total amount invoiced to date for this project #.

"Posted Exp"
Total expenses for the period selected

"Exp to Date"
All Expenses for selected Project

"Balance"
Invoiced - Exp to Date
Matches the GL

Standard Research Invoice and Milestone Research Invoice

Research Reports ▾



Financial Report Availability

Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.

Research Reports



- Summary Budget Status Report
- Budget Status Standard Report - Project De...
- Budget Status Report - Funds
- Standard Research Invoice
- Milestone Research Invoice
- Account Detail - Research
- Vendor Distribution - Project/Research
- Open Commitment Report

Research Labor Reports



- Labor Account Reconciliation Report
- Labor Employee Detail Report
- Research Home Cost Center LDR

ISD Template



- ISD Upload Templates

Useful Links



- Financial Crosswalk Tables
- Project Personnel
- BU Payroll Interface Cost Center Crosswalk

Standard Research Invoice and Milestone Research Invoice

Purpose: Creates a formatted report from Infor bill slips that Financial Analysts send to sponsors. Department users can run the invoice to see what expenses or milestones were include on an invoice created by your Financial Analyst

Home > PRD > Research > Milestone Invoice

Text Choice	Research Finance ▼	Project	<Select a Value> ▼	View Report
Project Contract	▼	Enter Invoice	▼	

1. Text Choice:
 - Milestone Invoice: Research Finance or CTO
 - Standard Invoice: Standard or Uniform Guidance
2. Project: select project you wish to see invoices for
3. Project Contract: field will auto-populate
4. Enter Invoice: drop-down field of all invoices created for the selected project

Account Detail

Research Reports ▾

Financial Report Availability

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Research Reports

Research Labor Reports

ISD Template

Useful Links

Account Detail

Purpose: provides transaction detail with format intended to be exported to table in Excel for further analysis – a.k.a data dump

The screenshot shows a web form for 'Account Detail'. It contains several input fields and dropdown menus, each with a red circular callout number. Callout 1 points to the 'Begin Date' text input field. Callout 2 points to the 'PI' dropdown menu, which currently shows 'All PIs'. Callout 3 points to the 'Summary Project' dropdown menu, which shows '<Select a Value>'. Callout 4 points to the 'End Date' text input field. Callout 5 points to the 'DeptAdmin' dropdown menu, which shows '<Select a Value>'. Callout 6 points to the 'Project' text input field. Callout 7 points to the 'Status' dropdown menu, which shows 'Funds Active,Active,Open AR,Close'.

Begin/End date: Select the dates for the report, based on post date.

PI: Defaults to all PIs, but you can run the report by PI

Summary Project: Select BMC grants (all grants) or BMC Funds

Dept Admin: must be selected from drop down. Can choose one admin or all admins

Project Number: Select a project number from the dropdown. The report can be run for one project or multiple. *Please note, if a PI or admin is selected from the number 2 or 5 dropdowns, the project numbers will be narrowed down to projects only assigned to that PIs or admins.*

Status: Defaults to all statuses. You can run this for one status, multiple, or all.

Vendor Distribution – Project Research

Research Reports ▾



...

Financial Report Availability

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Research Reports



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ISD Template



- ISD Upload Templates

Useful Links





- Financial Crosswalk Tables
- Project Personnel
- BU Payroll Interface Cost Center Crosswalk

Vendor Distribution – Project Research

Purpose: to check the status of all payables on a project

Home > PRD > Research > Vendor_Distribution Research

Project	4100000001-Oxygen Study, METRC	▼	Start Date	<input type="text"/>		End Date	<input type="text"/>	
Account	<input type="text"/>	▼	Vendor Name	<input type="text"/>	▼	Invoice Status	Amended,Approved,Cancelled,Hist	▼
PO	<input type="text"/>		Invoice	<input type="text"/>				

Project: select one or multiple

Start/End Dates: select range for report

Account: field will populate with available selections based on dates and project selected. Select expense account, one or multiple. Defaults to all.

Vendor Name: field will populate with available selections based on dates and project selected. Select vendor, one or multiple. Defaults to all.

Invoice Statues: select status of payables on project, one or multiple. Defaults to all.

PO: Optional field to narrow results to specific PO

Invoice: Optional field to narrow results to a specific invoice

Open Commitment Report

Research Reports ▾



Financial Report Availability

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Research Reports



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Research Labor Reports



- Labor Account Reconciliation Report
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- Research Home Cost Center LDR

ISD Template



- ISD Upload Templates

Useful Links



- Financial Crosswalk Tables
- Project Personnel
- BU Payroll Interface Cost Center Crosswalk

Open Commitment Report

Purpose: to identify all POs and requisitions opened under a project, see invoices paid on the POs, and the PO balances.

Project	4100000001-Oxygen Study, METR	1	Account	210090 - Accounts Payable Invoice	2
Vendor Name	1000000-QUEST SOFTWARE INC,1	3	PO		4
All or Open				All POs	5

Project: Can select one project, multiple, or all projects. Defaults to all projects. *You can run the report for When a project number is selected, the account and vendor fields will default only on the accounts and vendors opened on that project number.*

Account: field will populate with available selections based on dates and project selected. Select expense account, one or multiple. Defaults to all. Subcontract accounts

- Under 25K – 570590
- Over 25K – 570580

Vendor: field will populate with available selections based on dates and project selected. Select vendor, one or multiple. Defaults to all.

PO: Optional field to narrow results to specific PO

All or Open: All POs will include closed POs and the Open POs option will not. Defaults to All.

Labor Account Reconciliation

Research Reports ▾



Financial Report Availability

Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.

Research Reports



- Summary Budget Status Report
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- Labor Employee Detail Report
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ISD Template



- ISD Upload Templates

Useful Links





- Financial Crosswalk Tables
- Project Personnel
- BU Payroll Interface Cost Center Crosswalk

Labor Account Reconciliation

Purpose: to identify all POs and requisitions opened under a project, see invoices paid on the POs, and the PO balances.

Home > PRD > Research > Research LDR

Report Type	<Select a Value> ▼	Account	All Accounts ▼
Begin Date	<input type="text"/> 	End Date	<input type="text"/> 
PI	All ▼	Admin	All ▼
Contract	All Contracts ▼		
		Project	All Projects ▼

Report Type: Options are account, employee, or detail. Account and Employee options provide report with data summarized by account or employee. Detail report type recommended.

Account: Select one or all. Recommended all.

Begin/End Date: Select the dates for the report, based on post date.

PI: Select one or all.

Admin: Select one or all.

Contract: Select all or one. If run by contract, report will return all projects under that contract.

Project: Select one or all.

Labor Employee Detail Report

Research Reports ▾



Financial Report Availability

Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.




Research Reports



-  Summary Budget Status Report
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Research Labor Reports



-  Labor Account Reconciliation Report
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-  Research Home Cost Center LDR




ISD Template



-  ISD Upload Templates

Useful Links



-  Financial Crosswalk Tables
-  Project Personnel
-  BU Payroll Interface Cost Center Crosswalk

Labor Employee Detail Report

Purpose: to provide payroll detail by employee for all salary charged to a sponsored project. Requires employee number.

Boston Medical Center Health System

★ Favorites Browse

Home > PRD > Research > Research Employee Detail

Begin Date **1** End Date **2** Account All Accounts **3** View Report **6**

Project All Projects **4** Employee Nbr **5**

Begin/End Date: Select the dates for the report, based on post date.

Project: Can select one project, multiple, or all projects. Defaults to all projects.

Account: field will populate with available selections based on dates and project selected. Select expense account, one or multiple.

Employee Nbr – No default. Required field. For BMC employee enter the Workday Employee Number, and for BU use BU Employee number.

Research Home Cost Center

Research Reports ▾



Financial Report Availability

Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.

Research Reports

Summary Budget Status Report

Budget Status Standard Report - Project De...

Budget Status Report - Funds

Standard Research Invoice

Milestone Research Invoice

Account Detail - Research

Vendor Distribution - Project/Research

Open Commitment Report

Research Labor Reports

Labor Account Reconciliation Report

Labor Employee Detail Report

Research Home Cost Center LDR

ISD Template

ISD Upload Templates

Useful Links

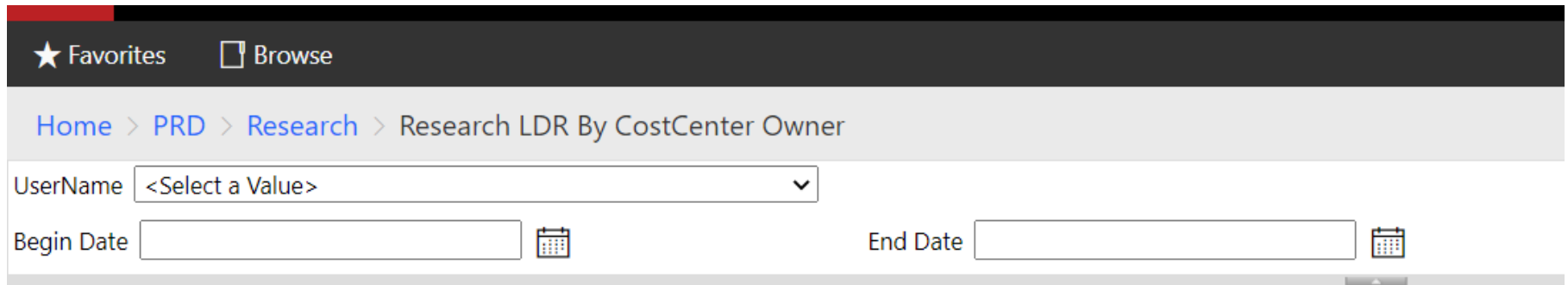
Financial Crosswalk Tables

Project Personnel

BU Payroll Interface Cost Center Crosswalk

Research Home Cost Center

Purpose: to provide payroll detail by employee for all salary charged to RHCCs. All salary must be removed from RHCCs.



The screenshot shows a web application interface for "Research LDR By CostCenter Owner". At the top, there is a dark navigation bar with a "Favorites" link (star icon) and a "Browse" link (document icon). Below this is a breadcrumb trail: "Home > PRD > Research > Research LDR By CostCenter Owner". The main form area contains three input fields: a "UserName" dropdown menu with the placeholder text "<Select a Value>", a "Begin Date" text box with a calendar icon to its right, and an "End Date" text box with a calendar icon to its right. The interface has a clean, professional look with a light gray background and blue accents.

UserName: Select a RHCC from list. Access to report on RHCC controlled by FIS and must be requested by your department AD.

Begin/End Date: Select the dates for the report, based on post date.

Useful Links

Financial Crosswalks

Research Reports ▾



Financial Report Availability

Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.

Research Reports



- Summary Budget Status Report
- Budget Status Standard Report - Project De...
- Budget Status Report - Funds
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- Milestone Research Invoice
- Account Detail - Research
- Vendor Distribution - Project/Research
- Open Commitment Report

Research Labor Reports



- Labor Account Reconciliation Report
- Labor Employee Detail Report
- Research Home Cost Center LDR

ISD Template



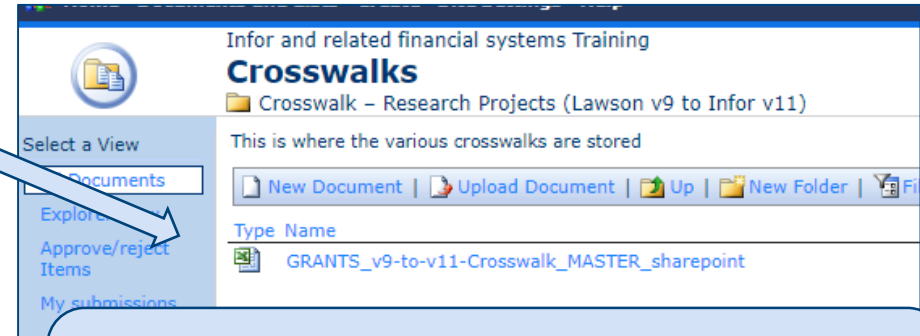
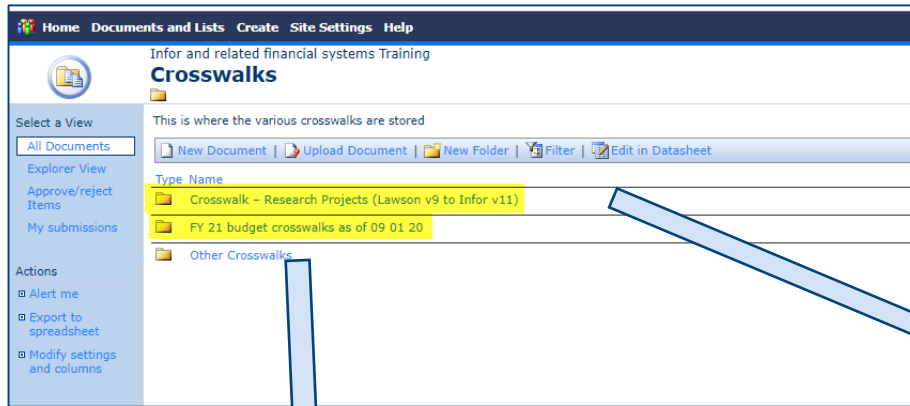
- ISD Upload Templates

Useful Links



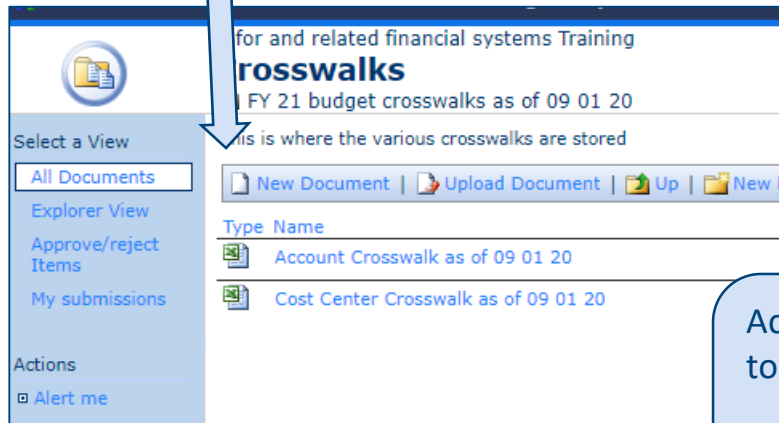
- Financial Crosswalk Tables
- Project Personnel
- BU Payroll Interface Cost Center Crosswalk

Financial Crosswalks



Project Crosswalk: maps V9 Lawson grant AUs, Activities to V11 projects and InfoEd record number

NOT FOR NEW Projects, just converted projects



Account Crosswalk: maps V9 Lawson chart of accounts to V11 for all companies

Cost Center Crosswalk: maps V9 Lawson cost centers to V11 for all companies

BU Payroll Interface Cost Center Crosswalk

Research Reports ▾



Financial Report Availability

Financial report and cube data is refreshed daily from 11:30-1:00PM, 3:30-5:00PM, and 2:00-5:00AM. Please click [HERE](#) for real-time report and cube status.




Research Reports



-  Summary Budget Status Report
-  Budget Status Standard Report - Project De...
-  Budget Status Report - Funds
-  Standard Research Invoice
-  Milestone Research Invoice
-  Account Detail - Research
-  Vendor Distribution - Project/Research
-  Open Commitment Report


Research Labor Reports



-  Labor Account Reconciliation Report
-  Labor Employee Detail Report
-  Research Home Cost Center LDR




ISD Template



-  ISD Upload Templates

Useful Links



-  Financial Crosswalk Tables
-  Project Personnel
-  BU Payroll Interface Cost Center Crosswalk

BU Payroll Interface Cost Center Crosswalk

Purpose: to provide current mapping of BU IO numbers to BMC projects and cost centers

Home > PRD > BU Payroll Integration > BU Payroll Interface Cost Center Crosswalk

Billing Entity	<input type="text"/>	▼	BUID (blank for all)	<input type="text"/>	Order (blank for all)	<input type="text"/>
Cost Center (blank for all)	<input type="text"/>		Project (blank for all)	<input type="text"/>	Include Inactive Rules	No ▼
					Rule UID	0

Billing Entity: Select 110 RSCH

- *Leave all other fields as they are*
- *You will need to open a ticket with FIS to get access to reporting on 110 RSCH for this report*

Project Personnel

Research Reports ▾



...

Financial Report Availability

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Research Reports



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Research Labor Reports



- Labor Account Reconciliation Report
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ISD Template



- ISD Upload Templates

Useful Links



- Financial Crosswalk Tables
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Project Personnel

Purpose: to provide current security profiles for all projects (includes sponsored programs, funds, capital projects, etc.)

★ Favorites Browse

Home > PRD > General Information > User Information > Project Personnel Report

Include Inactive Projects No Include Inactive Employees No

Include Non-Synchronized Projects No Project Status *** - All Project Status Types

1 of 2 100% Find | Next

Boston Medical Center
HEALTH SYSTEM

Project Personnel
2/3/2023 8:42:53 AM

This report combines Research Department Admins, Research Principal Investigators,

Report will auto-run once it's opened. Report parameters can be used to filter the report. Easiest to use when exported to Excel.

Include Active Projects: Defaults to No, but can be run to include inactive projects

Include Inactive Employees: Defaults to No, but can be run to include inactive employees

Include Non-Synchronized Projects: Defaults to No, do not change

Project Status: can be run for one or all status types. All recommended

How did we do?

Thank you for your time!

Did we achieve the learning goals?

- Understand how access works and who can help with new users or modifying existing user access
- Know who to contact when you have a reporting issue
- Learn how to run and read reports in Infor for sponsored programs

How can we improve this training?

Are there other trainings you would like to see?

Please send to Kaye.Mottola@bmc.org

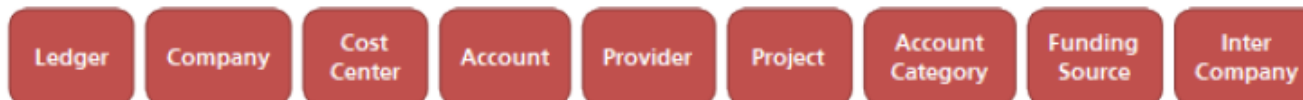
Appendix

V9 to V11 Accounting Strings

The Finance Enterprise Group (FEG) defines the new accounting string you'll use in Infor CloudSuite Financials (CSF).



The above blocks represent the accounting string used in Lawson v9. As you will see, although some of the names may be the same or similar, the order and function of some of the blocks in the string are different in Infor CSF.



These blocks represent all the accounting string segments used by BMCHS in Infor CSF Financials. You will notice there are similarities, and differences with Lawson V9. Also, please note that:

- Not all of these segments are required; some transactions require more segments than others.
- All segments will not display all of the time.
- Even if required, some segments will not need to be entered because they'll default.

We'll explain the function of each of these segments and show examples in this course.

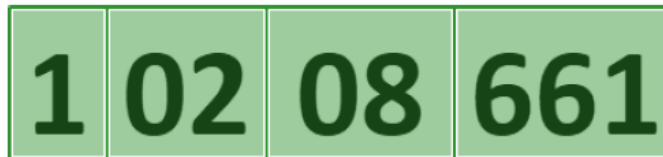
Cost Center

- A **Cost Center** represents an organizational element for a company. For example, a division, department, region, or location.
- Cost Centers are defined in a parent-child hierarchy within a Cost Center structure.
- A company can have multiple Cost Center structures.
- One Cost Center structure must be designated as an *enterprise structure*. The enterprise structure is the default Cost Center structure on the reporting basis.

Note: Cost Centers are similar to the Accounting Units in Lawson V9.

BMC Cost Center Numbering Logic

Below is an example of a BMC cost center number in Infor CSF v11. The number is eight digits in length and is represented by groups or blocks.



- 1st digit in Cost Center number represents the **Company**.
In this example, this number is related to BMC (Co1).
- The 2nd & 3rd digits in the second block represents the **Zone**.
In this example, "02" relates to the zone for "BMC".
 - 01 – BMCHS
 - 02 – BMC
 - 03 – BACO
 - 04 – BMCICS
 - 06 – BUAP
 - 07 – Captive
 - 08 – NAB
- The 4th & 5th digits in the third block represents the **Cost Center or Department grouping** where applicable. In this example, "08" relates to the BMC group for "Hospital Operations".

Account

The 4th and last required Finance Structure block is **Account**.

A chart of accounts (**COA**) is a list of accounts you use to organize your accounting records. It is made up of balance sheet accounts (assets, liabilities, and equity) and income statement accounts (income and expenses). The balance sheet and income statement accounts are made up of both summary and posting accounts.

Posting accounts roll up into summary accounts to provide totals. There is one enterprise chart for BMCHS named "CORPORATE", but there are several other charts for each company used for various reporting needs.

The chart of accounts is used to post journal entries and to summarize global ledger information for reports and inquiries. The account numbers and descriptions you define are reflected in your balance sheets, income statements, and other reports and inquiries.

The Account number is an **6 digit** code. The first digit of the account number identifies the type of account.

Starts with:

- **1** – Asset
- **2** – Liabilities and Net Assets
- **3** – Revenue and Contra Revenue
- **4** – Medical Costs
- **5** – Operating Expense
- **6** – Non-ops income/expense and other changes
- **7** – NA

Infor Statuses and Abbreviations

FD-AC Funds Active: Active Fund accounts managed by accounting (accounts starting in 5)

RO-AC Active: Active awards for Research Operations

RO-AR Open AR: A closeout status. This account is reconciled to close but we are waiting for invoice payment(s) from the sponsor

RO-CO Close Out: The project has ended and the RFA is working on the final invoice/financial report and reconciling expenses on the account.

RO-IN Inactive: The project has ended and the account is closed.

RO-PD Pending Award: An active status at the start of the award period where we are waiting to receive the agreement.

RO-RE Inactive Reconciliation: A closeout status. This account has ended and it is reconciled to close. All invoices have been paid and the RFA is working on the closeout packet for account inactivation.

Links

- [FIS Infor User Access-Modification Form](#)
- [Research and Funds Projects Access Request Form](#)
- [Self-Guided Invoice Approval Training](#)
- Requisition Trainings:
 - [Requisition Basics](#)
 - [Introduction and Overview](#)
 - [RSS Receiving](#)
 - [Requisition Approval](#)
- [BMC Bi-Weekly Pay Schedule](#)