Updates

3/11/2020 Search Feature section

General Information

Originally developed to help faculty manage their University financial resources, the FFIT provides balances and drill-down transaction details for all of a researcher’s individually owned active accounts and funds. The tool now also provides the same information for organizationally owned accounts and funds in a separate section (as appropriate). Current, projected, and forecasted balances are calculated using a combination of budget, revenue, expenditure and commitment information as appropriate for each account, including information from the Commitment Management System (CMS) if desired. This Quick Guide is intended to answer general questions about the tool; a Glossary of Terms is also available within the tool itself and on the Gateway to Financial Activities.

Access & Authority

Access to the tool is automatically granted to faculty researchers for all the individual’s respective accounts, regardless of where the activity occurs.

Access for administrators (e.g., local financial staff, department managers, chairs, deans, etc.) is granted using the Financial System > Shared Applications & Non-OBI Reporting > Salary View (Award) OR Salary View (Project-Task) privilege in Authority Manager.

To view a specific researcher’s inquiry results, an administrator must have been granted either:

- Salary View for at least one of the researcher’s respective org codes; or
- Salary View based on the specific researcher’s name.

To view a specific departmentally owned report, an administrator must have been granted Salary View for the related org code.

Individuals log in to the FFIT site (ffit.stanford.edu) with their personal SUNet ID and password.

Timing of Data

For all intents and purposes, FFIT contains “day-old” data. Notable exceptions include transactions which are fed to the Oracle Financials System on a less-than-daily basis (e.g., student aid transactions, which are fed from the GFS system either semi-monthly or monthly). Additionally, all transactions related to a new fiscal year are not available for the first three weeks in September until close of the prior fiscal year is complete.

Accounts Included
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The tool searches for all currently active accounts based on whether the researcher has been identified by local staff as the owner of either the project (P), the task (T), or the award (A) segment of any given account. Accounts are omitted if:

- the related project or task is marked as CLOSED and the account balance is zero; or
- the related sponsored award is marked as CLOSED/ON HOLD and Award Expenditures ≈ Receipts ≈ Budget (where ≈ is within $100); or
- the related non-sponsored award is marked as CLOSED and Available Balance = $0.00.

Account Names

Award names generally follow formats proscribed by either the Office of Sponsored Research or Fund Accounting; project and task names are generally at the discretion of individual departments. Contact your local financial administrator if you have questions about account names.

Selection Criteria

There are 3 primary choices a user can make when using this tool:

- **Display Accounts for**: selects the owner (or organization) whose accounts the user wants to view (and has authority to view).
- **Show Balances**: excludes or includes outstanding “hard commitment” or “CMS commitment” amounts to show either “current,” “projected” or “forecasted” balances, respectively.
- **Show Allocations**: includes or excludes accounts which have been allocated to others. Including allocations to others provides a full list of accounts for which the researcher (or organization) is somehow responsible (either directly or indirectly); excluding allocations shows only those accounts for which the researcher (or organization) is directly responsible. Note: When included, allocations to others are marked with an asterisk (*) and *italicized*.

Summary Page Report Sections

The Summary Page divides the relevant accounts into five sections:

1. **Government Grants & Contracts and Non-Government Grants**
   - For these accounts, units are expected to manage project expenditures against the project budget, in accordance with the timing and terms of the related sponsored agreement. The balance reflects the remaining unspent/uncommitted project budget and is calculated as:

   \[
   \text{PTD Budget/Expense Control} - \text{PTD Expenditures} - \text{Outstanding Commitments (either "hard" or "CMS")}
   \]

2. **Non-Government Contracts (e.g., Clinical Trials & Fixed Price Contracts)**
   - For accounts in this section, units may also be expected to manage and/or monitor collection of receipts, in addition to managing project expenditures against the project budget.
   - At the award level, cash receipts to-date are shown in comparison to the award budget.
   - At the account level, the balance reflects the remaining unspent/uncommitted budget and is calculated as in section 1:
3. Cost-Sharing and University Research
   • At the award level, available funding to-date is shown in comparison to the award budget. The total receipt and transfer amount is also drillable to explore individual funding transfers.
   • At the account level, the balance reflects the remaining unspent/uncommitted budget and is calculated as in sections 1 and 2:

   PTD Budget/Expense Control – PTD Expenditures – Outstanding Commitments (either “hard” or “CMS”)

4. Non-Sponsored Funds (e.g., Gifts & Designated Income)
   • For most lines in this section, units are expected to manage expenditures against actual receipts and balances carried forward (rather than budgets), ensuring their awards are not overspent and that the monies are spent in accordance with any donor requirements.
   • In most cases, budget information is not relevant, so balances reflect the remaining unspent receipts and are calculated as:

   FTD Beginning Balance, Receipts & Transfers – FTD Expenditures – Advances & Commitments (either “hard” or “CMS”)

   • Local administrators may enter budget information for non-sponsored awards (via iBudgets) in order to compare expenditures against current year budget (instead of available funding). In that case, award balances will reflect “unbudgeted funds” and are calculated as:

   FTD Beginning Balance, Receipts & Transfers – FTD Budget/Expense Control

   and account balances are calculated as:

   FTD Budget/Expense Control – FTD Expenditures – Outstanding Commitments (either “hard” or “CMS”)

5. Clearing Accounts
   □ In most cases, budget information is not relevant in this section, so balances will be calculated as:

   FTD Beginning Balance, Receipts & Transfers – FTD Expenditures – Advances & Commitments (either “hard” or “CMS”)

Drill-Down Features

Hyperlinks lead to additional screens that include mid-level summary information and most available transaction details. Award owners (or organizations) can see all details for a given award, including revenue and transfers, expenditures, and outstanding commitments; project and task owners can drill
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down to appropriate expenditure and commitment details. Breadcrumb trails at the top of each page indicate the path taken to the current screen.

Search Feature

You can now perform a PTA search in FFIT.
1. In the upper right hand window, click on Search

2. In the pop-up window, you can search for the Award and/or Project of the PTA you are researching

3. Depending on which access you have (Organizational or PI), you can then click on the Org or either Award/Project/Task Owner for details

Excel Downloads

Links to download the current page results to Excel are located in the bottom left of each screen.