



Date: July 29, 2008

To: Chief Administrative Officers

EXTRAMURAL FUND MANAGEMENT
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www.research.ucla.edu/efm

Re: Accessing the New FSR Due Report on the Office of Research Administration
New Online Resource Center Portal

On July 29, 2008, Vice Chancellor Roberto Peccei announced the launch of the Office of Research Administration (ORA) Online Resource Center, a new web-based portal for UCLA's research community. The Online Resource Center is intended to provide faculty, administrators and staff with a single point of access to both existing and new research-related information and resources, and to enhance overall communication between campus and central administration. In addition to other features, the portal contains a new "Financial Status Report (FSR) Due" report under the "Post-Award" tab.

FSR Due Report

The report will assist with the current Fund Backlog Initiative and will help to promote timely reporting in the future. While the information has been available in InfoEd and the Online Financial System Reports (OFSR), the new format readily reflects reporting status and the data may be downloaded into Excel.

The attached document, "FSR Status Tracking Guidelines," shows the new statuses that are now being used by EFM in InfoEd, and are reflected in the FSR Due report. Departmental users will now have the ability to track the status of FSRs as they move through the EFM review and submission process. Users can also pro-actively monitor Upcoming Reports Due to begin preparing the necessary documentation, or search Completed Reports to see when they were submitted to the sponsor.

The address for the new portal is <http://portal.research.ucla.edu>. To view the status of a report:

- Click on the "Post Award" tab.
- Click on the FSR Due report.
- Select Overdue, Upcoming or Completed from the sub-menu.
- Search for your department and click on the counts for the desired time period.
- A list of reports and their details, including the current status, will appear.
- Click the "Current Status" or "Status History" columns (depending on whether you have selected Overdue, Upcoming or Completed) to see the status history detail.
- The Status History page will appear with a listing of the statuses, associated dates and comments, and the EFM contact person who entered them.

Accessing the Report

Authorization and access control to the report will be handled through a new value-based function code, **RAFMRINQ – Research Administration Financial Management Reports Inquiry**, in the Distributed Access Computing Security System (DACSS). DSAs will be able to grant access to reports for organizational levels and codes within their DSA purview. You, as the Chief Administrative Officer, will need to determine who, within your unit, should be granted this inquiry function.

Once you have identified the individuals, please inform your Departmental Security Administrator (DSA). For employees without an OASIS logon ID, the DSA will submit a Service Access Request (SAR) to Administrative Information Systems (AIS), (<http://www.ais.ucla.edu/access/DSA/index.htm>). Once the logon ID has been created, the employee will be invited to Murphy Hall for a brief informational session, where the logon ID will be activated. Your DSA may then grant access to the DACSS functions in accordance with your directions.

If there are any questions, please contact Lynne Yorita at extension 46110 x224 or yorita@iad.ucla.edu; or me at extension 42838 or ebalabis@research.ucla.edu.

Sincerely,

Evelyn Balabis
Director
Extramural Fund Management

Attachment