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1. Introduction

*FAST MyResearch* is a dashboard specifically designed for researchers. The objective of *MyResearch* is to simplify the task of researchers by providing them with an effective tool to manage their funds. *MyResearch* allows easy viewing of the balances of all funds to which the researcher has online access. In addition, by using *MyResearch*, researchers can view multiple documents and relevant fund-specific financial reports.

2. Fund Types

A *research fund* is a fund specifically assigned for the fulfillment of a research project with an external or internal funding source, depending on the grantor. The number assigned to a *research fund* is always 6 digits long.

A *trust fund* is assigned to activities other than research. The number assigned to a trust fund is always 5 digits long. A *trust fund with agreement* starts with a 5 and a *trust fund* without agreement starts with an 8.

3. Access

Access to funds to which a researcher currently has online access will be given automatically. Access to new *research funds* in *MyResearch* is automatically given to the principal investigator twice a month, on the 15th and last day of every month.

The "*Request for access to the Financial System for researchers and assistants*" form must be completed and signed by the principal investigator to obtain access to *trust funds* to which the principal investigator does not currently have online access.

The "*Request for access to the Financial System for researchers and assistants*" form must be completed and signed by a co-investigator or an assistant to gain access to *research funds* and *trust funds*. The principal investigator’s signature is required.

Here is the link to the form: [http://www.uottawa.ca/erp/docs/AccessFormFINRES2012.pdf](http://www.uottawa.ca/erp/docs/AccessFormFINRES2012.pdf)
4. FAST MyResearch

4.1 Hyperlink to access FAST MyResearch

You will find below the instructions to access the financial system.

Please follow the steps below to access the system:

1. Type in the Web address or click the link: http://www.uottawa.ca/erp/en/system_access.html.

2. Choose the ‘FAST’ option.

3. Your user name is your employee number without the numbers 1 and 0, which precede your employee number, preceded by a capital E. (e.g.: E101010).

4. Your system password is the same as the one you use for your InfoWeb account. However, you must use all capital letters. If you have never logged into InfoWeb or never changed your InfoWeb password, your password consists of your birth year (the last 2 digits only), your birth month, your birth day and the last two digits of your employee number (YYMMDDDEE).

5. To speed up the login process, we suggest that once you get to the login screen, you add this page to your “FAVORITES” and / or create a shortcut that takes you directly to FAST from your Desktop. See Appendix 8 for more details.

If you have any questions or experience problems accessing FAST, please contact Computing Assistance at http://www.ccs.uottawa.ca/cybersos/ or by phone at extension 6555.

You can access the FAST system off campus. For access, please refer to Appendix 1 of this guide.
In **FAST**, enter your user name and password.

Click the **Sign In** button.

N.B. : Financial information is updated daily overnight.
The **MyResearch** screen is displayed.

Click any text element below to access information on your grant, contract or project. Example: Click a text element in the **Fund** column or click a title in the **Title** column.

Click any amount in the **Balance** column to go directly to the **Finance Reporting** application to view your transaction details and thus the date of the last transaction applied to your fund. Please refer to Appendix 5 of this guide.

The **Fund** field shows a research fund if it is 6 digits long and a trust fund if it is 5 digits long. (The example above shows only 3 digits, the last 3 digits having been deleted for confidentiality purposes.)

The **Title** field shows the long title.

The **Agency** field shows the granting agency.

The **End Date** field shows the end date of the project.

The **Principal Inv.** field shows the last name and first name of the principal investigator. (In the example above, that field is blank for confidentiality purposes.)
The **Authority** field shows **Principal Investigator** if you are the principal investigator or **Query** if you are a “co-investigator”, or an assistant for this fund.

The **Balance** field shows the balance available in this fund (Budget–expense –commitments). By clicking one of the amounts in the Balance column, you will access your fund’s financial data.

Please refer to Appendix 4 of this guide to read the balance of a research fund or a trust fund with agreement and to Appendix 7 to read the balance of a trust fund without agreement. In addition, account and document type are explained in Appendix 2 and 3 respectively.

The amount in the **Balance** column is **red** when your fund is in deficit and **green** when it is not in deficit.

The **CLOSED** status appears in the **Balance** column when the fund is closed in the system. However, you can click any of the fields below to access your fund information.
4.2 Printing the dashboard

The summary report lets you print on a single page the information you see in MyResearch.

Follow these steps to print the summary report:

1. Click the Research/Trust/Endowment application.

2. Click MyResearch.

3. Click Summary.

4. Click the Execute Report button.

NB: Please ignore the Filter Options, Advanced Options and Saved Reports tabs. Some of these tabs will only be available in the next phase.
5. The **MyResearch Summary** screen is displayed.

You can change the number of transactions displayed per page to display 500 transactions by default instead of 15 in the **MyResearch** screen. Please refer to Section 6 and follow the steps.

The summary report can be printed in PDF or Excel format.

Click the appropriate button which is located in the lower right.

Click the **Home** button which is located at the top left to return to the **MyResearch** screen and then get back to the main screen.
4.3 Information page of a specific fund

By clicking one of the fields of the MyResearch screen, as mentioned on page 6, the Fund Information Page is displayed for a specific fund.

In the Available Documents section, you can click a document in blue in the File Name column to view the document. Most financial reports and other relevant financial documents will be available to MyResearch.

You can click View Financial Details, which is located in the upper right, to view the Finance Reporting application according to the Current Year option for this fund.

To return to the MyResearch screen, click the Home button located at the top left.

N.B.: The grey icons located at the top right are not available.
The **Filter Options** icon lets you select another fund to access the **Fund Information Page** without returning to the **MyResearch** screen.

The **Page Notes** icon only lets you receive information from the system administrator and thus does not allow information to be entered.
5. Language selection

You can select your preferred language by clicking the button 🌐 that is located at the top right.

The Profile Info screen is displayed.

Follow the steps to change the language choice.

Click Edit.
Click the dropdown list next to the Language field to select your choice.

Click Save.
6. Changing the display of the number of transactions per page

You can change the number of transactions displayed per page to display 500 transactions by default instead of 15 by clicking the button located at the top right.

The Profile Information screen is displayed.

Here are the steps to change the number of transactions displayed per page.

Click Edit.
Click the dropdown list next to the Records Per Page field to select your choice.

Select 500.
Click **Save**.
7. Changing the resolution

The user can change the screen resolution to 1024 x 768 if he wants to fill the MyResearch screen.

Here are the steps to change the resolution.

Open your Internet browser and click the **start** button located in the lower left.

Click the **Control Panel** button.
Double click **Display**.
Click the **Settings** tab.
Drag the cursor to the line that indicates the screen resolution **1024 by 768 pixels** and click the **Apply** button.
Click the **OK** button.
APPENDIX 1. The VPN Client – to access the system off-campus

You can access the FAST application off-campus but you must be in a secure area. You have to connect through the VPN Client. For more information on the VPN Client, go to the Web page http://www.ccs.uottawa.ca/. Click Download the VPN Client, located in the Download Software section.

From the list of software, select the one appropriate for your computer.

VPN Client

- VPN Client for Windows XP/Vista/7
- VPN Client for Mac OS 10.7
- VPN Client for Mac OS 10.4 or 10.6
- VPN Client for Mac OS 10.2 or 10.3
- VPN Client for Linux
- VPN Profile for iPhone and iPad
- Login credentials for VPN

For assistance, contact Computing Assistance at http://www.sic.uottawa.ca/cybersos/ or by phone at extension 6555.

N.B. Instructions for installing the VPN Client differ depending on the make of computer and internet browser used by the user. We are not able to include complete instructions in this guide given the complexity. The expertise of a computer specialist is required for the proper installation of the VPN Client on your computer.

You can also contact your faculty’s IT technical support team to help you install the VPN Client on your computer.
APPENDIX 2. Accounts

Current Accounts (Revenues and Expenses)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5XXXX</td>
<td>revenue accounts (current)</td>
</tr>
<tr>
<td>6XXXX</td>
<td>salaries and benefits accounts (current)</td>
</tr>
<tr>
<td>7XXXX</td>
<td>other expense accounts (current)</td>
</tr>
</tbody>
</table>

Depending on the Current Year option, the amounts associated with these Revenue and Expense accounts are in 3 columns: Month Actual, YTD Actual, and O/S Commitments.

- **Month Actual**: Expenses for the current period depending on the month selected
- **YTD Actual**: Cumulative expenses since May 1st of the current year
- **O/S Commitments**: Commitments

→ Click the YTD Actual title to view all transactions.

→ Click any blue amount to view all the posted transactions by account in the current year.

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**Budget accounts**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>50000</td>
<td>Budget account for Revenues,</td>
</tr>
<tr>
<td>70000, 70010, 70020, 70030, 70040 and 70090</td>
<td>Budget accounts for Expenses.</td>
</tr>
</tbody>
</table>

Under the option Current Year, the amounts associated with those budget accounts appear in the second column entitled Effective Budget.
APPENDIX 3. Documents

To help easily identify transactions in Finance Reporting, there are many document types.

Under budget accounts 50000, 70000, 70010, 70020, 70030, 70040 and 70090, documents starting with:

CVTB are balances carried forward as at April 30, 2008 (conversion entry),
RB and RS are budgets created in FAST Research.

Please ignore documents that begin with DRL, ENRL and MJ. These are documents generated by the financial system to carry over budgets.

Under Current accounts (Revenue & Expense):
AR Accounts Receivable
CVT Conversion Entry
DA Deposit
F Payroll
I Supplier Invoice
J Journal Entry
RS Invoices - Research

Fund Types

Research funds are 6 digits long and trust funds (not research) are 5 digits long. Trust funds with agreement start with a 5 and trust funds without agreement start with an 8.

The procedure to read the balance of a fund in Finance Reporting varies depending on the Fund Type. Please refer to Appendix 4 of this guide to read the balance of a research fund and a trust fund with agreement and to Appendix 7 to read the balance of a trust fund without agreement.
APPENDIX 4. How to read the balance of a research fund and a trust fund with agreement

Budget

A budget must be created by Financial Services for each research fund and trust fund with agreement in order for the funds to be available. An update is necessary for the budget to be applied to the fund in the Finance Reporting application. This transaction to create a budget in a fund is updated once a day from Banner (financial system) to the FAST Finance Reporting application. The update is done overnight.

The funds are controlled at the budget level and not at the revenue account (actual) level in Banner. The Revenue budget is posted to the 50000 account while the budget Expense is posted to one of the following accounts: 70000, 70010, 70020, 70030, 70040 and 70090.

View the balance of a research fund and a trust fund with agreement

You must always use the Current Year option to view a balance.

The Current Year option lets you view the budget balance (Budget–Expenses–Commitments). You must look at the Effective Budget, YTD Actual and O/S Commitments columns.

Attention! The Current Year includes all the posted revenue and expense transactions, including the salary and benefits expenses from May 1 to April 30, the University’s fiscal year.
To read the balance of a Research Fund you must look at the intersections of the Total Expenses line and the $ YTD Variance column.

N.B. To get the transaction details and the date of the last transaction posted to your fund, please refer to Appendix 5.
APPENDIX 5. Transaction details and date of the last transaction posted to your fund

Here are the steps to follow to get the transaction details as well as the date of the last transaction posted to your fund.

1. Click an amount in the Balance column of the MyResearch screen.
2. By default, the Finance Reporting application is displayed according to the Current Year option and the current month is displayed in the Period field for the selected fund.
3. Click the YTD Actual column heading.
4. All the posted income and expense transactions, including salaries and benefits from May 1 until the date selected, are displayed.

N.B.: The Current Year option includes all transactions recorded from May 1 to April 30, according to the University’s fiscal year.

Select a previous period by clicking From at the top left of the dropdown list to look up the transactions for a period before May 1 of the current fiscal year.

5. Click Show All Records at the bottom left to display all transactions.
6. Click the **Tran Date** column heading to sort transactions by date and obtain the date of the last transaction posted to your fund.

7. Click the icon 📈 to download and print the report in Excel or on the icon 📑 to download and print the report in PDF format. The icons are located at the bottom right of the report.

8. Click **Home**, located at the top left, to return to the **MyResearch** screen.

**N.B.:** It is possible that some transactions are **Pending**. These transactions are not included in the **Finance Reporting** application. Therefore, these transactions are not included in your fund balance. **Pending** means that the transaction is either not completed or is pending approval. Once completed and approved, a system update is necessary to record the transaction in the **Finance Reporting** application. The update is performed daily, overnight.
APPENDIX 6. Project To Date

The **Project To Date** option can be used only for funds that started after May 1, 2008.

The **Project To Date** option must not be used for funds that started before May 1, 2008, as information regarding budgets and YTD expenses is wrong. This is due to the financial system conversion.

To recognize funds created before May 1, 2008 with the **Project To Date** option, perform the following steps:

1) The **Project to Date** option must be selected.

2) Click the amount at the intersection of the 50000 line and the **Total Budget** column.

3) If a document starting with **CVTB** appears in the **Document** column, this fund was created before May 1, 2008.
The balance for research funds according to the **Project To Date** option is read at the intersection of the **Total All Expenses** line and the **Budget Balance** column.

**Total Budget:** Includes every budget created since the beginning of the fund.

**Month Actual:** Includes all monthly revenue and expense transactions.

**YTD Actual:** Includes all revenue and expense transactions for the fiscal year to date.

**Project Actual:** Includes all revenue and expense transactions from the beginning of the fund to the selected date.

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**Researcher's Guide**
APPENDIX 7. How to read the balance of a trust fund without agreement

Contrary to the research funds and trust funds with agreement, trust funds without agreement do not need a budget.

Trust funds without agreement are 5 digits long and start with an 8.

Funds are available as soon as revenue is posted to a trust fund without agreement.

View the balance for a trust fund without agreement

You must always use the Current Year option to view a balance.

The Current Year option allows you to view the actual balance for the trust funds without agreement. To do so, you must look at the YTD Actual and O/S Commitments columns.
Screen view of **Current Year** option for a trust fund without agreement

Example: 26,192.95 – 1,983.34 = 24,209.61

The balance is 24,209.61

*You must read the balance of a trust Fund without agreement from the Closing Fund Balance – All Orgn Codes Included line minus any commitments on the Total EXPENSES line, if applicable.*
APPENDIX 8. Online access to Monthly Report FTR540

You can view and print your monthly reports FTR540 from the WebFOCUS application.

**Attention:**
Only Internet Explorer and Mozilla Firefox are supported when accessing the WebFOCUS application. Users of Apple (Mac) products must use the Mozilla Firefox browser. The SAFARI browser is not compatible with the WebFOCUS application.

Click the WebFOCUS Finance application.

Select Researchers.

Click **Download the User Guide** to view and print the User Guide.

APPENDIX 9. Favorites

To add a link to yourFavoritesfor Internet Explorer browser users and create a shortcut, follow these steps:

1. Select the FAST link. (Follow steps 1 and 2 on page 4 of the guide.)
2. Click the Favorites option.
3. Click Add to Favorites, located below.
4. You can rename the link with the name of your choice. Then click Add.
5. Open your directory by clicking **Favorites**. Position the cursor on the **FAST** link without clicking and right-click with your mouse to open the window. Click **Copy**.

6. On your **Desktop**, right-click with your mouse to open the window below.

7. Paste the link to your **Desktop** by clicking **Paste Shortcut**.
## APPENDIX 10. Lexicon

<table>
<thead>
<tr>
<th>English</th>
<th>French</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ YTD Variance ($ Year To Date Variance)</td>
<td>$ Écart à ce jour</td>
</tr>
<tr>
<td>Acct (Account)</td>
<td>Cpte (Compte)</td>
</tr>
<tr>
<td>Actv (Activity)</td>
<td>Actv (Activité)</td>
</tr>
<tr>
<td>Amount</td>
<td>Montant</td>
</tr>
<tr>
<td>Banner PO # (Banner Purchase Order)</td>
<td># Bon de commande de Banner</td>
</tr>
<tr>
<td>Budget Fav/Unfav</td>
<td>Budget Fav/Défav</td>
</tr>
<tr>
<td>Chart</td>
<td>Plan</td>
</tr>
<tr>
<td>Cheque #</td>
<td># Chèque</td>
</tr>
<tr>
<td>Click here to download to Excel</td>
<td>Cliquez ici pour télécharger en format Excel</td>
</tr>
<tr>
<td>Click here to return to the Menu</td>
<td>Cliquez ici pour revenir au menu</td>
</tr>
<tr>
<td>Closing Fund Balance - All Orgn Codes Included</td>
<td>Solde de fermeture d’un fonds - Inclusant tous les Orgs</td>
</tr>
<tr>
<td>Current Year</td>
<td>Année en cours</td>
</tr>
<tr>
<td>Doc. #</td>
<td># Doc.</td>
</tr>
<tr>
<td>Effective Budget</td>
<td>Budget effectif</td>
</tr>
<tr>
<td>Fund</td>
<td>Fonds</td>
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<td>Fund Type</td>
<td>Type de fonds</td>
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<td>Initial Budget</td>
<td>Budget initial</td>
</tr>
<tr>
<td>Invoice / Ref. #</td>
<td>Facture / # Ref.</td>
</tr>
<tr>
<td>Locn (Location)</td>
<td>Lieu</td>
</tr>
<tr>
<td>Month Actual</td>
<td>Réel du mois</td>
</tr>
<tr>
<td>O/S Commitments (Outstanding Commitments)</td>
<td>Engagements</td>
</tr>
<tr>
<td>Opening Fund Balance - All Orgn Codes Included</td>
<td>Solde d’ouverture d’un fonds - Inclusant tous les Orgs</td>
</tr>
<tr>
<td>Orgn (Organization)</td>
<td>Org (Organisation)</td>
</tr>
<tr>
<td>Period</td>
<td>Période</td>
</tr>
<tr>
<td>Prog (Program)</td>
<td>Prog. (Programme)</td>
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<tr>
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<td>Total partiel</td>
</tr>
<tr>
<td>Title</td>
<td>Titre</td>
</tr>
<tr>
<td>Total Revenues Less Expenses</td>
<td>Total revenus moins dépenses</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>Total des dépenses</td>
</tr>
<tr>
<td>Total Revenues</td>
<td>Total des revenus</td>
</tr>
<tr>
<td>UserID</td>
<td>Code d’utilisateur</td>
</tr>
<tr>
<td>YTD Actual (Year To Date Actual)</td>
<td>Réel à ce jour</td>
</tr>
</tbody>
</table>