FAST MyResearch

Researcher’s Guide

Version 1.1

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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:
https://it.uottawa.ca/sites/it.uottawa.ca/files/access_form_researchers_2016.pdf
4. FAST MyResearch

4.1 Hyperlink to access FAST MyResearch

You will find instructions to access the financial system below:

1. Go to the Web page:
   https://fast.uottawa.ca/FASTPORTAL_PROD/Login.aspx

2. Your user name is your employee number without the first numbers 1 and 0, preceded by an E.
   (e.g.: E101010 or e101010).

3. Your system password is the same as the one you use for your uoAccess account.

If you have any questions or experience problems accessing FAST, please contact the IT Service Desk at
http://it.uottawa.ca/service-desk-request or by phone at extension 6555.

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

Click on the **Sign In** button.

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

Click on 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 on 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.
The amount in the **Balance** column is **red** when your fund is in deficit and **green** when it is not in deficit.
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 on the Research/Trust/Endowment application.

2. Click on MyResearch.

3. Click on My Summary.
4. The **MyResearch Summary** screen is displayed.

The summary report can be printed in PDF or Excel format. Click on the appropriate button which is located in the lower right.
Click on 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 on 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 on 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.

The Filter Options tab allows you to select another fund from Fund Information Page without returning to the MyResearch screen.
To return to the **MyResearch** screen, click the **Home** button located at the top left.
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 on Edit.
Click on the dropdown list next to the **Language** field to select your choice.

Click on **Save**.
APPENDIX 1. 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 must connect through the VPN Client. For more information on the VPN Client, go to the Web page https://it.uottawa.ca/software.

Click on Software and VPN Client, located in the Download Software section.

Select the option appropriate for your computer.

For assistance, please contact the IT Service Desk at http://it.uottawa.ca/service-desk-request or by phone at extension 6555.

N.B. Instructions for installing the VPN Client differ depending on the 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

<table>
<thead>
<tr>
<th>Current Accounts (Revenues and Expenses)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5XXXX</td>
</tr>
<tr>
<td>6XXXX</td>
</tr>
<tr>
<td>7XXXX</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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<table>
<thead>
<tr>
<th>Budget accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>50000</td>
</tr>
<tr>
<td>70000, 70010, 70020, 70030, 70040 and 70090</td>
</tr>
</tbody>
</table>

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

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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 and H 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.
APPENDIX 4. How to read the balance of a research fund and a trust fund

**Budget**

A budget must be created by Financial Services for each research fund and trust fund 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**

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

![Image of the Transaction Date column](image)

**N.B.:** Click a column heading to sort the transactions by order of this column. A drilldown analysis is available for all data in blue.

7. Click on the icon ![Excel download](image) to download and print the report in Excel or on the icon ![PDF download](image) to download and print the report in PDF format. The icons are located at the bottom right of the report.

8. Click on **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 on 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.
APPENDIX 7. Favorites

To add a link to your FAVORITES for 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 on the Favorites option.

3. Click on Add to Favorites, located below.

4. You can rename the link with the name of your choice. Then click on 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 on 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 8. 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/Défavor</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 - Incluant 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>
</tr>
<tr>
<td>Fund Type</td>
<td>Type de fonds</td>
</tr>
<tr>
<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 - Incluant 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>
</tr>
<tr>
<td>Subtotal</td>
<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>