

## Creating a new Part-of Account in GMAS

This document covers how Central users can create a part-of account as part of the segment revision process in GMAS.

### Setting Up Part-Of Accounts in a GMAS Segment Revision

- On the segment homepage, click **Make Revision**. Navigate to the **Accounts** component and select **Edit**. There are three scenarios that could exist:

Scenario A - The account to be created will already have a shell with the appropriate attributes:

01	Main 1	Y1-3	Main	275	23440	110405	260137	0001	28624	Active
01	SEAS Part-of		Part	325	28630	110405	----	----	45390	Under Development

Scenario B - The account to be created will already have a shell, but will not have the appropriate attributes:

01	Main 1	Y1-3	Main	275	23440	110405	260137	0001	28624	Active
01	OEB Part-of		Part	275 X	23440	110405	----	----X	28624	Under Development

Scenario C - The account to be created will not exist yet:

01	Main 1	Y1-3	Main	275	23440	110405	260137	0001	28624	Active
01	MGH	Y1-2	SubA	275	23440	110405	260137	0002	28624	Active

- To create a new part-of account,

Scenario A - Select the Part-of account shell with the correct attributes.

Scenario B - Select the Part-of account shell with the incorrect attributes

Scenario C - Select "Add account" or "Add multiple accounts"\*:

<b>Add account</b>		<b>Add multiple accounts</b>		<b>Edit account group descriptions</b>							
Grp	Description	Year	Type	Auth. tub	Auth. org	Fund	Activity	Sub activity	Auth. root	Status	At Risk
01	Main 1	Y21-24	Main	370	32000	135986	346475	0005	51685	Active	

\*If you are adding multiple accounts:

- Identify how many accounts will need to be created.

- b. Enter the first subactivity value of the part-of accounts (they will automatically be created in numerical order, but they can be changed when editing each string):

Activity 260137 - A02, U.S. Army Med Rsch Acqu, Dev of Affinity Reagents for Multi

Enter the subactivity value of the first account being created 0005

(GMAS will automatically create values for the additional accounts which can be changed on the next screen.)

- c. After entering all of the information, whatever number was identified in step a will be the number of shells you will individually edit.

- 3. Enter the account information for the part-of account you are adding:

**Account information**

\*Type: Part-of ← The account type should be "Part-of."

\*Description: FCOR-Schacter-Part-of ← As decided by the GCS or department, or descriptive of the type of funds (i.e., "Participant Support Costs")

Status: Under development

Year: Y1 ← The Year descriptor should match the main account.

Start date (mm-dd-yyyy): 08-15-2012

End date (mm-dd-yyyy): 05-31-2017

Funds allocated (\$,00): 0.00

Restricted funds:  Yes  No ← Restrictions on accounts are only an identifier. Selecting "yes" here only notifies the account owner that there may be limitations for what can be charged to this account (i.e. stipends.)

\* Account group: 01 - Account Group 1 **Create new account group** ← Account group should match the main.

Research country: United States

Campus location: On Campus ← Campus location should match the main.

- 4. Enter the indirect cost information.

Edit rates to add the part-of department's rate to the account. The Effective date should match the Start date for the account.

**Indirect costs**

Indirect costs basis: Modified Total Direct Costs ← Select the correct basis for the part-of account.

Indirect costs rates	Effective date (mm-dd-yyyy)	Rate (%)	GL effective date (mm-dd-yyyy)
<b>Edit rates</b>	08-15-2012	69.00	

Research location: **Edit locations**

\*\*HU ID#

\*\*Sequence ID#

Affiliate exchange account no.

- Modified Total Direct Costs: only object codes identified as being overhead-bearing will take overhead at the specified rate on this account.
- Total Direct Costs: All object codes will take overhead at the specified rate on this account.

The research location only needs to be completed if the part-of department is within HMS.

- Enter the At-Risk Account information.

At-risk account information	
At-risk account?	<input type="radio"/> Yes <input checked="" type="radio"/> No
At-risk amount (\$ .00)	<input type="text"/>
At-risk start date (mm-dd-yyyy)	<input type="text"/>
At-risk end date (mm-dd-yyyy)	<input type="text"/>

If the funds for this account were not yet authorized, "yes" would be selected and the at-risk information would be entered. If the account was not at-risk, this section would be skipped.

- Enter the Chart-of-Accounts values.

Chart of accounts values	
Chart segment	Value and descriptor
Authorized tub	370
*Authorized org	<input type="text" value="32000 - FCOR*Psychology"/> <input checked="" type="checkbox"/> <b>Lookup</b>
Fund	135986 - Schacter, NIH/NIA, 5R01AG008441-24, Aug-12, May-17,
Activity	346475 - A02, NIH/NIA, Aging Memory, <input checked="" type="checkbox"/> <b>Select</b>
Subactivity	<input type="text" value="0006"/>
Authorized root	<input type="text" value="51685 - FCOR*Schacter, Daniel L 30377"/> <input checked="" type="checkbox"/> <b>Lookup</b>

Enter the ORG for the part-of department and perform a lookup. Once the ORG is confirmed, the tub will automatically change to the correct tub. (The ORG must reflect the department the part-of account is intended for.)

The activity will pre-populate with the main account's activity value. If the activity is different, click **Select** to assign an activity value that has already been established, or to create a new activity value.

The next available subactivity for the identified activity value will automatically generate. This can be manually changed.

The part-of department PI's root is what should be used in the part-of account (00000 cannot be used as a value.)

- Click **OK**, then **Done making changes to this section**. If applicable, you can continue allocating funds to the new part-of account.
- When you're finished, add the **Action memo comment** for "Setting up a Part-of account" and click **Save and continue later**. The GCS will then review and commit changes.

**NOTE:**

It is important for the part-of account information to reflect the part-of departments tub, org, and root value. The tub and org indicate which schools and departments the funds belong to and are managed by, and the root value not only identifies which PI the funds belong to, but it also drives effort reporting.

When part-of accounts are created, the administrative team will need to be updated to include the part-of account departments grant administrators. The grant administrators should be given the Observer role which will allow them to run appropriate CREW reports and view information in GMAS.