

XSEDE Finance Portal

To Initially Gain Access to the XSEDE Finance Portal

- Please go to <http://www.xsede.org>
- Click SIGN IN (in the upper-right hand corner)
- Click Create Account (under the SIGN IN button)
- Complete the form and click SUBMIT
- Once you have your registration set up, if you are not already logged in, please log in by clicking in the upper-right hand corner on <http://www.xsede.org>
- Verify your account via email
- Set up username and password
- Click on STAFF HOME and follow the instructions for NOT being a member:
 - Visit [Membership Management](#)
 - View the list of available communities below by clicking on 'Available Communities'
 - On the right of the 'Staff' is a 'Request Membership' link, please fill out the comment field with your role in XSEDE and submit that form to complete your membership request. A staff member will reply as soon as possible adding you to the staff community

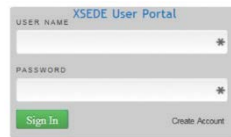
If you have any questions, please contact xsede-admin@ncsa.illinois.edu



XSEDE Finance Portal

Logging Into the XSEDE Finance Portal

1. Log into xsede.org
2. Choose the “Go to” drop down menu
3. Select “XSEDE Finances”

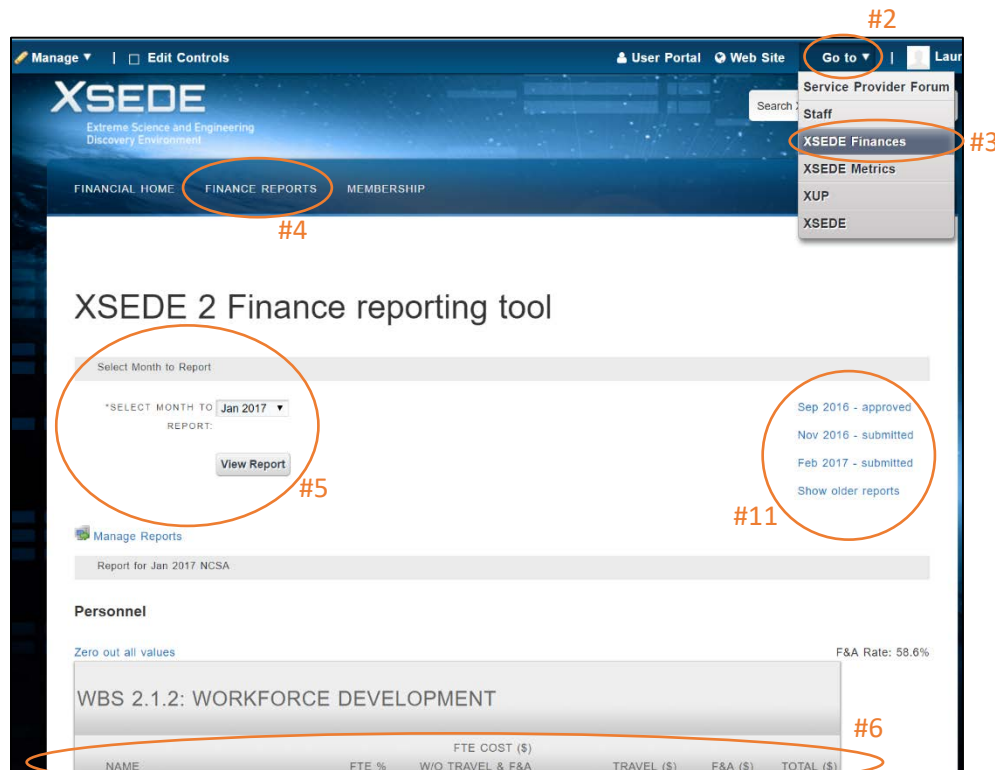


XSEDE User Portal

USER NAME

PASSWORD

Sign In Create Account



The screenshot shows the XSEDE Finance Portal interface. Annotations include:

- #2: The "Go to" dropdown menu in the top right corner.
- #3: The "XSEDE Finances" option in the dropdown menu.
- #4: The "FINANCE REPORTS" link in the top navigation bar.
- #5: The "View Report" button in the "Select Month to Report" section.
- #6: The "WBS 2.1.2: WORKFORCE DEVELOPMENT" section in the report.
- #11: The "Show older reports" link in the report list.

Finance Reports

4. For L2 and L3 reports, go to FINANCE REPORTS

Monthly Finance Submissions

5. Click the “Select Month To Report” drop-down menu and select the month that corresponds to the invoice for which you are submitting. Click the “View Report” button to open the reporting page:
 - a. The report will contain a separate section for each WBS category for which your institution receives funding. Each section will have a line to report direct costs for each person from your institution known to have funding from that WBS area. Please note that Indirect Costs/ F&A/ Overhead will be automatically calculated so please only enter direct costs.



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6. There are 3 fillable fields per person per WBS area:

FTE %	FTE COST (\$)			TOTAL (\$)
	W/O TRAVEL & F&A	TRAVEL (\$)	F&A (\$)	
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

- b. **FTE %:** please enter numbers only for the percent effort each person worked in each WBS category. For example, if Bob Smith worked 65% in WBS 2.1.2 enter only 65.
- c. **FTE Cost (\$) (w/o travel & F&A):** in this field, please enter the total cost (labor, benefits, any labor driven costs for your institution) for each person. For example, Bob Smith worked 65% on WBS 2.1.2 in July 2016. 100% of his effort for the month of July 2016 is \$6,500 (salary \$4385, benefits \$1973.25, labor driven communication costs \$141.75). In this field enter \$4225 for 65% of \$6500.
- d. **Travel (\$):** In this field enter the direct cost for travel for the month per person per WBS area. This amount should include registration fees if there are any

7. Also notice the subtotal per person as well as a subtotal for each WBS area

8. If you need to add a person who is not listed:

- e. At each WBS level you can add a person, then going forward the tool should save that name.



- f. Currently there is not a method to remove a name. If there is an error you wish to correct, please contact xsede-admin@ncsa.illinois.edu

9. Institutional funding non-FTE items can be entered at the bottom:

Institution					
CATEGORY	AMOUNT	F&A	TOTAL (\$)	WBS	COMMENTS
Non-FTE	<input type="text" value="1180.00"/>	<input type="text" value="691.48"/>	<input type="text" value="1,871.48"/>	<input type="text" value="2.6.2: External Relations"/>	<input type="text" value="Internet 2"/>
Equipment > \$5K	<input type="text" value="0"/>	<input type="text" value="N/A"/>	<input type="text" value="0"/>	<input type="text" value="Choose here"/>	
Participant support costs	<input type="text" value="1500.00"/>	<input type="text" value="N/A"/>	<input type="text" value="1500.00"/>	<input type="text" value="2.6.1: Project Office"/>	<input type="text" value="Stipends"/>

- g. Choose the category that matches the expense
 - i. non-FTE will assess F&A, equipment over \$5k and participant support categories will not assess F&A
- h. Load the direct cost amount in the first box, the F&A and Total will automatically calculate
- i. Select the WBS from the drop down that they expense matches, if you have multiple WBS items then select the '+' to add multiple lines within the same same category.
- j. Use the comments field so that managers of the account know what the expense is for, ie. License.

10. Check the grand total, toward the bottom, so that it matches your campus/statement or invoice for that month:

Grand Total	122,147.31
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- k. We need institutions to submit reports monthly, so reports won't always tie out to the invoice we are provided if an invoice covers multiple months.
 - l. Once this grand total is completed please select Submit values at bottom of page to submit it to NCSA for review and approval
 - m. The practice is once the invoice has been reviewed and approved by John Towns, the NCSA business office will then approve the invoice in the portal and submit the paper to campus for final payment. This process can take up to one month before payment is received.
 - n. If you make a mistake and want the monthly report returned to you, please email xsede-admin@ncsa.illinois.edu so that one we can return it to you
11. Reviewing previous reports:
- o. The most recent reports appear on the right side of the screen, toward the top. Click "Show older reports" to view additional submissions
 - p. If you notice an error that needs to be corrected, please email xsede-admin@ncsa.illinois.edu
12. Recall report:
- q. If you submitted a report and noticed that a change is needed, you may recall the item.
 - r. To recall a report, select the expense month and click view report. At the top left of the page will be a button to click to 'recall report for this month'.



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