

## 7.1 - Managing funding

The "Funding" form allows you to manage all the funding used by your office for international activities. For each funding, the various tabs in this form give you access to all the data relating to the funding: entries, grants, statuses, expense types, etc.

Various selection forms accessed from the main menu can be used to process the data entered in this form.

To open the "Funding" form, click "Funding" in the main menu and then "Funding data".

### 1- "Funding" form

Revenue		Expenses		
16.10.09	Agency	22.000,00 EUR	Payment internship	1.050,00 EUR
<b>Total</b>		<b>22.000,00 EUR</b>	<b>Total</b>	<b>1.050,00 EUR</b>
			<b>Available</b>	<b>20.950,00 EUR</b>

Fig. 1: "Funding" form

#### Upper part of form

The upper part of the form contains a selection bar with drop-down lists. These lists allow you to filter the fundings by various criteria:

- Academic year
- Funding

The essential data relating to the selected funding (name, time unit, currency and conversion rate if applicable) is displayed below these drop-down lists.

#### Tabs

Various tabs give access to data relating to the selected funding in the form of lists or forms. These tabs are described in detail in part 3 of this section.

### 2- Adding, editing or deleting a funding

To add a funding, click the Add button on the right of the funding selection bar.

To edit basic funding data, click the Edit basic data button in the "Tools" tab.

These two buttons open a window in which you can add or edit a funding.

**Fig. 2: Window for adding/editing a funding**

For each funding you can specify the following basic data (fields marked with an asterisk are mandatory):

- Funding type (\*)
- Academic year: if the academic year at the institution does not correspond to the calendar year, this field can be used to indicate whether the funding is based on the academic year (ticked) or the calendar year (unticked)
- Year (\*)
- Time unit (\*) (options: fixed, month, week, day)
- Currency (\*)
- Conversion rate (\*) (relative to the default currency used in the program)
- Types of use (options: outgoing students, incoming students, outgoing staff, incoming staff, expenses)

The funding types are defined in the moveon reference tables. The configuration of the funding types is described in detail in section 4.2. Once the funding type has been selected, certain fields in the window are completed automatically on the basis of the data entered in the funding types configuration (academic year, time unit, currency).

To delete a funding click the Delete button in the "Tools" tab.

### 3- Tabs in the "Funding" form

#### "Summary" tab

This tab contains general information and comments on the selected funding, with a summary of the associated resources and expenses.

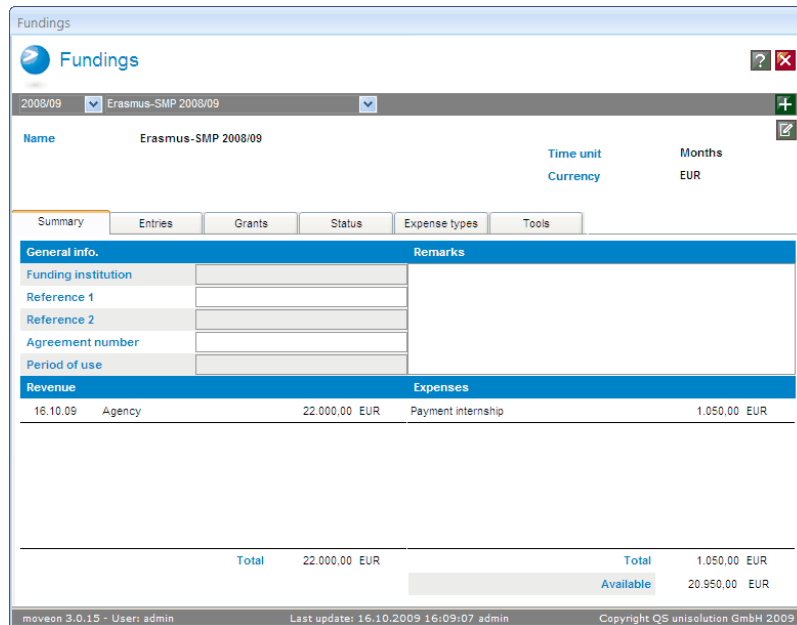


Fig. 3: "Funding" form, "Summary" tab

The general information and the comments can be edited by clicking the Edit button in the upper part of the "Funding" form.

The resources are listed individually in the lower left-hand frame. They are sorted in decreasing date order.

Expenses are grouped by expense type in the lower right-hand frame.

### "Entries" tab

This tab contains the list of entries (resources and expenses) associated with the selected funding.

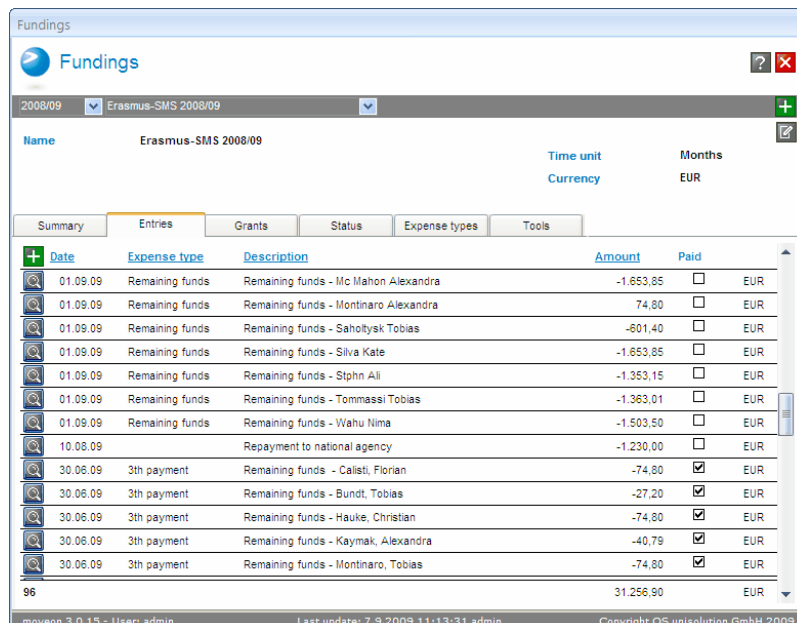


Fig. 4: "Funding" form, "Entries" tab

Entries are sorted in decreasing date order.

Details of how to add, edit and delete entries can be found in part 7 of this section.

## "Grants" tab

This tab contains the list of grants associated with the selected funding.

Name	Institution	Begin	End	Status	Dur.	Planned	Paid	Balance	
Begmn, Frank	Universidad de Salamanca	25.10.2008	24.9.2009	SC	11	1,300.00	1,310.00	10.00 EUR	
Bell, Hillary	University of Glasgow	1.10.2008	25.2.2009	S	2,25	292.50	292.50	0.00 EUR	
Bessing, Angélique	Universita degli studi di Firen	1.10.2008	31.7.2009	F	2	260.00	260.00	0.00 EUR	
Bolk, Teresa	Technische Universität Graz	1.10.2008	31.7.2009	S	10	1,300.00	1,300.00	0.00 EUR	
Brossard, Marion	Technische Universität Eindl	1.10.2008	31.7.2009	LS	6	0.00	780.00	780.00 EUR	
Bundt, Tobias	Technische Universität Eindl	1.10.2008	28.1.2009	S+	4	1,200.00	520.00	-680.00 EUR	
Bye, Steffen	Technische Universität Wien	1.10.2008		S	5,25	1,430.00	1,430.00	0.00 EUR	
Calisti, Florian	Universidad de Deusto	1.10.2008		S+	11	3,300.00	-3,030.40	-6,330.40 EUR	
Cendre, Céila	Technische Universität Delft	1.10.2008		S	10	1,300.00	0.00	-1,300.00 EUR	
Condi, Cécile	University College of Wales	1.10.2008		S	5	650.00	650.00	0.00 EUR	
Creusot, Patrice	Technische Universität Delft	1.10.2008	31.7.2009	S	5	650.00	650.00	0.00 EUR	
Depoission, Patrice	Universita degli studi di Firen	1.10.2008	9.2.2009	S	3	390.00	390.00	0.00 EUR	
						169,5	24,422,50	15,472,10	-8,950,40 EUR

Fig. 5: "Funding" form, "Grants" tab

A drop-down list located in the upper part of the tab can be used to filter the grants by the person type.

For each grant the list shows the institution and the dates of the mobility, the total amount of the entries associated with this grant and the balance relative to the planned amount.

Details of how to add, edit and delete grants can be found in part 6 of this section.

## "Statuses" tab

This tab contains the list of grant statuses defined for the selected funding.

Type	Code	Name	Duration	Amount	%paid	Number	Duration	Total
student	S	Standard rate	2 << 12	130xD	0.00%	17	135,5	15,632,50 EUR
student	LS	Label students	3 << 12	0xD	0.00%	1	6	780,00 EUR
student	SC	Scandinavia	3 << 12	200+100xD	0.00%	1	11	1,310,00 EUR
student	S+	Maximum rate	4 << 36	300xD	0.00%	2	15	-2,510,40 EUR
student	Sc+	scan	5 << 10	215,78xD	0.00%	0	0	0,00 EUR
student	F	forfait 2 mois	2 << 2	260+0xD	0.00%	1	2	260,00 EUR
						22	169,5	15,472,10 EUR

Fig. 6: "Funding" form, "Statuses" tab

For each status the list shows the number of grants associated with this status and the durations and total amounts of these grants.

Details of how to add, edit and delete grant statuses can be found in part 5 of this section.

### "Expense types" tab

This tab contains the list of expense types defined for the selected funding.

Type	Name	Planned	Paid	Balance	
Outgoing students	1st payment	0,00	3.769,35	-3.769,35	EUR
Outgoing students	2nd payment khhghj	0,00	2.022,20	-2.022,20	EUR
Outgoing students	3th payment	0,00	-3.122,01	3.122,01	EUR
Outgoing students	4th payment	0,00	0,00	0,00	EUR
Outgoing students	redistrib	0,00	-2.172,57	2.172,57	EUR
Outgoing students	Remaining funds	0,00	14.065,13	-14.065,13	EUR
Outgoing students	Repayment	0,00	900,00	-900,00	EUR
		0,00	15.462,10	-15.462,10	EUR

Fig. 7: "Funding" form, "Expense types" tab

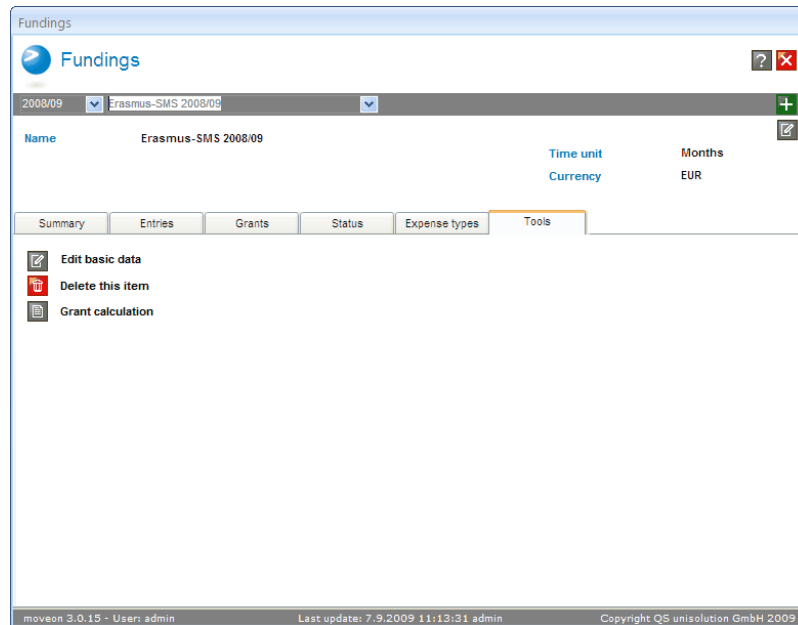
For each expense type the list shows the total amount of the entries associated with this expense type and the balance relative to the planned amount for this expense type.

Details of how to add, edit and delete expense types can be found in part 4 of this section.

### "Tools" tab

The "Tools" tab contains various buttons which allow you to:

- Edit the basic data (see above)
- Delete the item (see above)
- Calculate grants (see section 7.3)

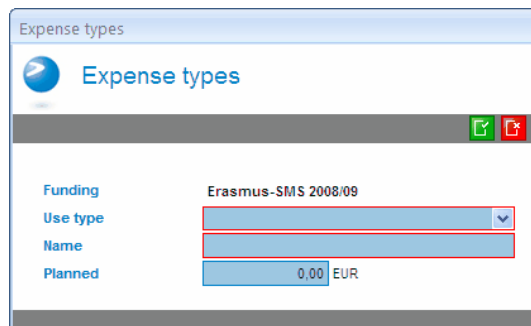


**Fig. 8: "Funding" form, "Tools" tab**

#### 4- Adding and editing expense types

Expense types can be added, edited and deleted from the "Expense types" tab in the "Funding" form.

To add an expense type, click the Add button in this tab. To edit or delete an expense type, click the Details button in this tab. These two buttons open a window in which you can add or edit expense types.



**Fig. 9: Add/edit expense types window**

For each expense type you can specify the following elements (fields marked with an asterisk are mandatory):

- Use type (\*) (under the use types defined for the funding)
- Name (\*)
- Planned amount

#### 5- Adding and editing grant statuses

Grant statuses can be added, edited and deleted from the "Statuses" tab in the "Funding" form.

To add a status, click the Add button in this tab. To edit or delete a status, click the Details button in this tab. These two buttons open a window in which you can add or edit statuses.

**Fig. 10: Add/edit statuses window**

For each status you can specify the following data (fields marked with an asterisk are mandatory):

- Use type (\*) (under the use types defined for the funding)
- Code (\*)
- Name (\*)
- Fixed amount of grant (\*)
- Minimum authorised amount of grant by time unit (\*)
- Maximum authorised amount of grant by time unit (\*)
- Minimum authorised duration of grant (\*)
- Maximum authorised duration of grant (\*)
- %paid (\*)

## 6- Adding and editing grants

Grants can only be added in the "Grants" tab of the "Mobilities" form (see section 6.2).

Grants can be edited and deleted from the "Grants" tabs in the "Funding" form or the "Mobilities" form. To edit or delete a grant, click the Details button in these tabs. This button opens the "Grants" form.

**Fig. 11: "Grants" form**

For each grant you can specify the following elements (fields marked with an asterisk are mandatory):

- Status (\*)
- Duration (\*)
- Planned amount

The "Entries" frame in the lower part of this form contains a list of entries associated with this grant.

Details of how to add, edit and delete entries associated with a grant can be found in part 7 of this section.

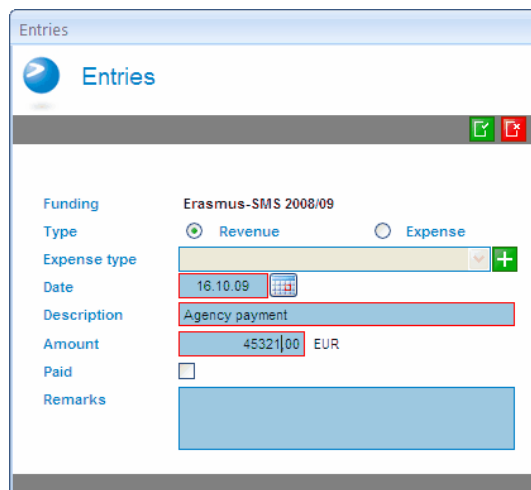
## 7- Adding and editing entries

Entries not associated with a grant (e.g. resources, general expenses) can be added from the "Entries" tab of the "Funding" form by clicking the Add button.

Entries associated with a grant (e.g. payments) can be added from the "Grants" form by clicking the Add button in the "Entries" frame. The "Grants" form can be accessed from the "Grants" tabs in the "Funding" or "Mobilities" forms by clicking the Details button for the appropriate grant.

In both cases the Add button opens a window in which you can add or edit entries.

Entries can be edited or deleted from the "Entries" tab in the "Funding" form, even if the entries are associated with grants, or from the "Grants" form (only if the entries are associated with a grant). In both cases clicking the Details button in these tabs opens a window in which you can add or edit entries.



The screenshot shows a window titled "Entries" with a blue header and a globe icon. Below the header is a dark bar with a green checkmark and a red plus sign. The main content area is a form with the following fields:

- Funding:** Erasmus-SMS 2008/09
- Type:** Revenue (selected with a radio button), Expense (unselected)
- Expense type:** A dropdown menu with a green plus sign to its right.
- Date:** 16.10.09, with a calendar icon to its right.
- Description:** Agency payment
- Amount:** 4532|00 EUR
- Paid:** An unchecked checkbox.
- Remarks:** A large empty text area.

**Fig. 12: Add/edit entries window**

For each entry you can specify the following elements (fields marked with an asterisk are mandatory):

- Type (\*) (resource or expense)
- Expense type (expenses only; under the expense types defined for the funding)
- Date (\*)
- Name (\*)
- Amount (\*)
- Paid
- Comments

The grant calculation form allows you to automatically add multiple entries associated with grants (see section 7.3).

## 8- Processing funding data

A number of different selection forms are available for processing the data relating to funding (correspondence, lists, statistics, interfaces):

- Selection of funding
- Selection of grants
- Selection of entries

These forms can be accessed from the main menu in the "Funding" menu.

The way in which selection forms work is described in detail in section 8.1.