

# PI View: Overview Main

**RAFT** For PIs  
REPORTING AND FORECASTING TOOL
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Overview

Cost Object Details

Forecast Expenses

Forecast People 3

MESSAGE: From: John Financial Advisor 05/03/14

### PI View Overview

BUDGET  
COEUS Awards

Actuals are current through yesterday.  
 Right-click column header to customize column display.

Cost Object ID	Cost Object Name	Period Effect. Date	Period Exp. date	Final Exp date	COEUS Award Budget	Actuals	COEUS Award Budget -Actuals	Commitments	Forecast	Award End Balance	Final Expiration Balance
<a href="#">6081234</a>	Cell Research	01/01/2013	12/31/2015	12/31/2018	\$1,000,000	\$10,000	\$1,000,000	\$81,000	\$0	\$919,000	\$919,000
<a href="#">6081235</a>	Cell Division Carter Fund	01/01/2015	05/30/2016	05/30/2016	\$240,000	\$10,000	\$230,000	\$2,000	\$0	\$8,000	\$8,000
<a href="#">6081236</a>	Cell Replication Carter Fund	09/01/2015	01/01/2018	12/31/2019	\$260,000	\$10,000	\$250,000	\$30,000	\$0	-\$110,000	-\$110,000
<a href="#">6081238</a>	Cell Migration in Newborns	06/01/2014	09/01/2016	09/01/2017	\$240,000	\$10,000	\$230,000	\$30,000	\$0	\$40,000	\$40,000
<a href="#">6081246</a>	NIH A	01/01/2013	07/31/2018	07/31/2018	\$2,000,000	\$10,000	\$1,999,000	\$12,000	\$0	\$1,000,000	\$1,000,000
<a href="#">6081270*</a>	NIH B*	09/01/2012	10/31/2015	12/31/2017	\$35,000	\$10,000	\$34,000	\$24,000	\$0	\$11,000	\$11,000

\*Expires during time frame

- 1 Alert badge with number on tab or as red circle shows that there is an issue (under allocation, negative totals, etc.) that needs to be addressed
- 2 ON HOVER:
 

Award End Balance is the projected balance on the expiration date of the award.

 Tooltips: clear explanation of terms on chart headers
- 3 Cost Object IDs link to Cost Object Details
- 4 Message display: notes from FA

Cost Object ID	Cost Object Name	Eff Date	Exp date	COEUS Award Budget	Actuals
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65% opacity/tint of Sand (BEAE66)

**Maroon 5A1D17**

**Dark Green 615A36**

**90% black 272727**

**Yellow F3E7B3**

**Sand BEAE66**

BUDGET  
COEUS Awards

Top tint  
70% Yellow F3E7B3

Bottom tint  
100% Yellow F3E7B3

Text is Dark Green  
615A36

**Yellow F3E7B3**

**Dark Green 615A36**

Cost Object ID	Cost Object Name	Eff Date	Exp date	COEUS Award Budget	Actuals
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On hover and click  
100% opacity/tint of Sand (BEAE66)

PI View: Overview Main 1

DATE: 03/12/2014

Jessica Silver

● updated with notes: June 10

# PI View: Cost Object Details

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Overview
Cost Object Details
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### Cost Object Details

Actuals are current through yesterday. Right-click column header to customize column display.

COST OBJECT	DATE RANGE	BUDGET	GL HIERARCHY	WITH CHILDREN?
C6081235	05/01/14-12/31/17	COEUS Award Budget	MIT Standard Version	<input checked="" type="checkbox"/> YES

GL Category	Budget	Actuals	Commitments	Forecast	Balance
Expenses	\$1,000,000	\$10,000	\$81,000	\$0	\$919,000
▼ Direct Expenses	\$240,000	\$10,000	\$2,000	\$0	\$8,000
▼ Salaries & Benefits	\$260,000	\$10,000	\$30,000	\$0	-\$110,000
• Salaries & Wages	\$240,000	\$10,000	\$30,000	\$0	\$40,000
• Employee Benefits	\$2,000,000	\$10,000	\$12,000	\$0	\$1,000,000
Expenses	\$1,000,000	\$10,000	\$81,000	\$0	\$919,000
▼ Direct Expenses	\$240,000	\$10,000	\$2,000	\$0	\$8,000
▼ Salaries & Benefits	\$260,000	\$10,000	\$30,000	\$0	-\$110,000
• Salaries & Wages	\$240,000	\$10,000	\$30,000	\$0	\$40,000
• Employee Benefits	\$2,000,000	\$10,000	\$12,000	\$0	\$1,000,000
BALANCES	Consolidated Institute: -1,368	Institute: -1,368	SAP Current: -1,368	with Expense Commitments: -1,368	Auth Total: 50,000

# PI View: Forecast People by Month

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### People/Appointments

BUDGET  
 COEUS Awards

VIEW BY  
 Months

TIME  
 SUM 2013 | FALL 2014-SPR 2013 | **SUM 2014-FALL 2015** | SPR 2015-SUM 2015

Add an Appointment  
Add TBH Add Person Save

Name	Appointment Exp.	Appt. Exp. Date	Date	Total	6081234* Cell Research	6081235 Cell Division	6081236 Replication	6081238 Cell Migration	6081246 NIH A	6081270 NIH B
Bathilda Bagshot <small>Research Assistant</small> <small>\$23.50/hr.</small>		11/30/2016	Sep 2015	100%	60%	—	10%	20%	10%	—
			Oct 2015	100%	60%	—	10%	20%	10%	—
			Nov 2015	100%	60%	—	10%	20%	10%	—
			Dec 2015	100%	60%	—	10%	20%	10%	—
			Jan 2016	90%	60%	—	10%	20%	10%	—
			Feb 2016	90%	60%	—	10%	20%	10%	—
			Mar 2016	90%	60%	—	10%	20%	10%	—
			Apr 2016	90%	60%	—	10%	20%	10%	—
May 2016	90%	60%	—	10%	20%	10%	—			
Amelia Bones <small>Research Assistant</small> <small>\$1000.00/mo.</small>		9/30/2016	Sep 2015	100%	80%	—	10%	—	10%	—
			Oct 2015	100%	80%	—	10%	—	10%	—
			Nov 2015	100%	80%	—	10%	—	10%	—
			Dec 2015	100%	80%	—	10%	—	10%	—
			Jan 2015	100%	80%	—	10%	—	10%	—
			Feb 2015	100%	80%	—	10%	—	10%	—
			Mar 2015	100%	80%	—	10%	—	10%	—
			Apr 2015	100%	80%	—	10%	—	10%	—
May 2015	100%	80%	—	10%	—	10%	—			
Amos Diggory <small>Research Assistant</small> <small>\$3500.60/mo.</small>		12/31/2015	Sep 2015	100%	60%	—	10%	10%	—	20%
			Oct 2015	100%	60%	—	10%	10%	—	20%
			Nov 2015	100%	60%	—	10%	10%	—	20%
			Dec 2015	100%	60%	—	10%	10%	—	20%
			Jan 2016	100%	60%	—	10%	10%	—	20%
			Feb 2016	100%	60%	—	10%	10%	—	20%
			Mar 2016	100%	60%	—	10%	10%	—	20%
			Apr 2016	80%	60%	—	10%	10%	—	20%
May 2016	80%	60%	—	10%	10%	—	20%			
Arabella Figg <small>Research Assistant</small> <small>\$17.50/hr.</small>		10/31/2015 <small>* appt has ended</small>	Sep 15	100%	60%	—	—	40%	—	—
			Oct 15	100%	60%	—	—	40%	—	—
			Nov 15	N/A	**	—	—	*	—	—
<b>Monthly Total Costs</b>				<b>by Month</b>						
				Sep 2015	\$18,500	\$0	\$6,000	\$8,000	\$3,000	\$1,000
				Oct 2015	\$18,500	\$0	\$6,000	\$8,000	\$3,000	\$1,000
				Nov 2015	\$15,815	\$0	\$6,010	\$4,000	\$3,400	\$1,000
				Dec 2015	\$15,515	\$0	\$6,010	\$4,000	\$3,400	\$1,000
				Jan 2016	\$15,500	\$0	\$6,010	\$4,000	\$3,400	\$1,000
				Feb 2016	\$15,500	\$0	\$6,000	\$4,000	\$3,400	\$1,000
				Mar 2016	\$15,515	\$0	\$6,017	\$2,000	\$3,400	\$1,000
				Apr 2016	\$7,000	\$3,000	\$6,010	\$2,000	\$3,400	\$0
				May 2016	\$7,000	\$3,000	\$6,010	\$2,000	\$3,400	\$0
<b>Calculated Balances on Cost Object End Date</b>				<b>End Date</b>	\$4,000	\$10,000	\$13,000	\$20,000	\$500	\$3,500

1 Alert badge with number on tab or as red circle shows that there is an issue (under allocation, negative totals, etc.) that needs to be addressed  
 ON HOVER: of single alert: Details

Suspense Projected  
 APR: 2016

2 ON HOVER:  
 C 6081238: Sponsor: NIH  
 Exploratory Research in XYZ.  
 Duration: JAN 2014 -DEC 2017

Hover detailed info for cost objects

3 Conditional Navigation appears for non-PI.

4 Add Tuition Appt. is a conditional button when applicable. Add Tuition Appt.

20%	Normal
10%	As entering text: color
20%	On hover: frame highlight
10%	Past date (noneditable)
*	Expired appt or CO (noneditable)
—	Total is 0
90%	Red indicates negative total or underallocation

PI View: People by Months  
 DATE: 03/27/2014  
 Jessica Silver

● updated with notes: June 10

# PI View: Forecast Expenses

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### Expenses

BUDGET  
 COEUS Awards ▼

All Expenses
M & S
Travel
Eqipt.
SubAwards
Other
Revenue

Expense Category ▼	Expense Start Date	Expense End Date	6081234 <small>Cell Research</small>	6081235 <small>Cell Division</small>	6081236 <small>Replication</small>	6081238 <small>Cell Migration</small>	6081246 <small>NIH A</small>	6081270 <small>NIH B</small>
Travel		10/31/2015	—	—	\$5,000	—	—	—
Materials & Services	09/15/2015	11/01/2015	—	\$2,000	\$5,000	—	—	—
Equipment		12/05/2015	\$6,000	—	—	\$5,000	\$2,000	—
SubAwards		03/31/2016	—	—	—	—	\$25,000	—
Other		10/31/2015	—	—	\$5,000	—	—	—
Revenue		04/05/2016	—	—	—	—	-\$6,000	—

  

Totals on Cost Object End Date		6081234	6081235	6081236	6081238	6081246	6081270
	Actuals	\$74,000	\$240,000	\$255,000	\$230,000	\$1,000,000	\$200,000
	Forecasts	\$170,000	\$150,000	\$155,000	\$5,000	\$21,000	\$5,000
	Indirect Costs on Forecasts	\$14,000	\$5,000	\$5,000	\$1,500	\$6,000	\$1,000
	Total Costs	\$258,000	\$395,000	\$415,000	\$236,500	\$1,027,000	\$206,000
	Authorized Total	\$262,000	\$405,000	\$428,000	\$256,500	\$1,027,500	\$209,500

  

Calculated Balances on Cost Object End Date		\$4,000	\$10,000	\$13,000	\$20,000	\$500	\$3,500
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# PI View: Forecast Expenses

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### Expenses

BUDGET

COEUS Awards

Add Expense
Save

All Expenses
M & S
Travel
Equipt.
SubAwards
Other
Revenue

Expense Name	Expense Start Date	Expense End Date	Rolls Off?	Amoritize?	6081234 Cell Research	6081235 Cell Division	6081236 Replication	6081238 Cell Migration	6081246 NIH A	6081270 NIH B	
Research Trip Spring		10/31/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	\$5,000	-	-	-	-
General	09/15/2015	11/01/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	\$2,000	\$5,000	-	-	-	-
Research Trip Spring		10/31/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	\$5,000	-	-	-	-
China		09/31/2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	-	-	-	-	-
San Diego		12/05/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$6,000	-	-	-	-	-	-
RA Travel Conference	09/31/2015	11/31/2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	-	-	-	-	-
Conference UK		10/31/2015	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	-	\$5,000	-	-	-	-
General	01/15/2015	03/01/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	-	\$2,000	\$5,000	-	-	-	-
Research Trip Fall		10/31/2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	\$5,000	-	-	-	-
General		03/31/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	-	\$25,000	-	-
San Diego: Winter		01/05/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$6,000	-	-	\$17,500	-	-	-
RA Travel		04/05/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	-	-	\$5,000	-	-

Totals on Cost Object End Date	Actuals		\$74,000	\$240,000	\$255,000	\$230,000	\$1,000,000	\$200,000
	Forecasts		\$170,000	\$150,000	\$155,000	\$5,000	\$21,000	\$5,000
	Indirect Costs on Forecasts		\$14,000	\$5,000	\$5,000	\$1,500	\$6,000	\$1,000
	Total Costs		\$258,000	\$395,000	\$415,000	\$236,500	\$1,027,000	\$206,000
	Authorized Total		\$262,000	\$405,000	\$428,000	\$256,500	\$1,027,500	\$209,000

Calculated Balances on Cost Object End Date		\$4,000	\$10,000	\$13,000	\$20,000	\$500	\$3,500
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NOT SHOWN  
Working prototype has Entry Line on top.

PI View: Travel Expenses  
 DATE: 03/27/2014  
 Jessica Silver

# PI View: Forecast People by Month: Supporting Details

Add an Appointment

Add TBH

Appointment: TBH- Research Assistant

Active Dates: Begins / / Ends / /

Pay Rate: \$ /mo.

On campus? yes

Cancel Add

Add Person

Appointment: Enter Name

Active Dates: Begins / / Ends / /

Pay Rate: \$ /mo.

On campus? yes

Cancel Add

Add Tuition Appt.

Tuition Appointment: Enter Name

Active Dates: Begins / / Ends / /

Tuition Rate: \$ /mo.

Cancel Add

BUDGET: COEUS Awards

VIEW BY: Months

TIME: SUM 13 | FALL 14-SPR 14 | **SUM 14-FALL 15** | SPR 15-SUM 15

BUDGET: COEUS Awards

VIEW BY: Semesters

TIME: 2013 | 2014 | **2015** | 2016 | 2017 | 2018

BUDGET: COEUS Awards

VIEW BY: Years

TIME: **2013-2014** | 2013-2019 | 2013-2024

first item=arrows point right

TIME: 2013-2014 | **2013-2019** | 2013-2024

middle item=arrows point both directions

TIME: 2013-2014 | 2013-2019 | **2013-2024**

last item=arrows point left

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PI View: Supporting docs  
DATE: 03/16/2014  
Jessica Silver