

Forecast Wireframes

MIT RAFT

Last updated: 12/4/2012



Reporting and Forecasting Tool

MY RAFT

PIs

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- + NAME OF A COLLECTION/WORKSET (12)
- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- + NAME OF A COLLECTION/WORKSET (12)
- + NAME OF A COLLECTION/WORKSET (10)

[Hide all system messages](#)

- Please note the system will be off line from 2 am to 4 am tomorrow (Tuesday) for maintenance. Watch out for new charts and graphs after this brief outage.
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- Please note the system will be off line from 2 am to 4 am tomorrow (Tuesday) for maintenance. Watch out for new charts and graphs after this brief outage.

[REPORT](#)

[FORECAST](#)

Alerts

Cost Objects

Needs attention

The following items require attention.

- 6071234 Photonic Bandgap Structures**
\$600K of \$1.44M remaining
Dec 2010 – Sept 2013
 Darcy, John (PI) [View forecasts \(3\)](#)
- 6071235 Some Other Project Name**
\$523k of \$1.2M
Jun 2007 – May 2013
 Bennett, Elizabeth (PI) [View forecasts \(3\)](#)
- 6071235 Some Other Project Name**
\$523k of \$1.2M
Jun 2007 – May 2013
 Bingley, John (PI) [View forecasts \(3\)](#)

People

Needs attention

The following people require attention.

- Bennett, Elizabeth (PI)
90% on 3 cost objects
Dec 2010 – Sept 2013
- Bingley, John (PI)
120% on 3 cost objects
Jun 2007 – May 2013
- Darcy, John (PI)
100% on 3 cost objects
Jun 2007 – May 2013

Home Dashboard

NOTES

System Notifications

Only appear on the home page. They will appear for xx days or until a user closes them. No more than 5 should appear at a time. Users can click the Hide all system messages link. That should hide the messages for this session. If they are closed, they stay closed forever.

Calls to Action

The Forecast and Report buttons will pop open dialog boxes that prompt users to go to existing forecasts and reports, respectively or to create new ones. See the modules descriptions at the back.

Alerts

We will list projects and cost objects that need attention separate from PIs that need attention. Should this include people too?

The final list of alerts is TBD. We need to show some explanation with the alert perhaps next to the flag, so the drop-down includes the alert category and the flag includes the alert message.

FOR COLLECTIONS & COST OBJECTS

We will show the name, number of cost objects in a collection, the number of a cost object, what's been spent and what's remaining, start and end dates, a link to the PI, and a link to the forecasts associated with each—this will go to the compare forecasts page.

FOR PIs

Show name, percent allocation, number of cost objects, and start and end dates. The alerts will work similarly here. We will have alert categories in the drop-down and the flag will include a description.

The flag is on or off. It does not require multiple states. If something has an alert attached to it, it gets a flag.

The columns can grow independently. No need for internal scroll bars.

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- + NAME OF A COLLECTION/WORKSET (12)
- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- Waves and Beams (3)
- + 6081234 Project Name here
- + 6081235 Project Name here
- + 6081236 Project Name here
- + NAME OF A COLLECTION/WORKSET (10)

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HOME

WAVES AND BEAMS (3)

Cost Objects & People Forecasts Reports Authorizations Comments

Cost Objects & People

PY 1 Start date – End date Budget (default budget)

Cost Objects

The following cost objects are part of this workset. Actuals are current through [today – 1].
Select a cost object to view or create new forecasts.

Cost Object	Start date	End date	Authorized total	Actuals	Actuals + Planned ▼	Available
6081234 Name of CO	1/1/2012	11/1/2012	\$1,902,000	\$1,520,000	\$1,720,000	\$100,000
6081235 Name of CO	1/1/2012	11/1/2013	\$240,000	\$40,000	\$100,000	(\$100,000)
6081236 Name of CO	1/1/2012	11/1/2014	\$260,000	\$60,000	\$100,000	(\$100,000)

People

The following people are part of this workset.

People	Title	Appointment end date ▼
— Bennett, Elizabeth (PI)	Principal Investigator	11/1/2013
	Principal Investigator	11/1/2014
Cowling, Cathy	Research Assistant	11/1/2013
+ Lemke, Mike		
Fine, Jared	Research Assistant	11/1/2013
Weissman, Zeth	Research Assistant	11/1/2014

Workset: COs & People

NOTES

The Cost Object columns should be

- CO/Account number
- Authorized total (same as total budget through current year)
- Actuals plus planned (Cumulative) means actual expenses + commitments (all that are entered) + forecast (preferred forecast or 0)
- Actuals (current through yesterday)
- Available = Budget minus Cumulative
- Start-end dates (show the real end date if we have it, rather than the SAP date)

This table displays all current data which means beginning of project for the first project to today (or end of last month).

We are going to need hovers on column headers defining what's included in each set of numbers.

NO COST EXTENSIONS (FORECASTS)

Can happen more or less automatically for the first year. OSP handles this. This changes the end date of the overall project. Users need to be able to forecast into the future beyond the end date of the project to handle this kind of spending. We need an indicator on a forecast that includes spending beyond the current project/total end date. Status = "Assumes NCE."

People Alerts/Flags

For people, the flag means over or under allocated using the actuals + planned for each cost object within the workset. Flag is either on or off. The options are All, Over..., Under... All doesn't get a flag state. We need tooltips on the flags to get the details.

People Appointments

For people with only 1 appointment, just show that 1. For people with multiples, we need an expand/collapse feature.

Workset Forecasts are out of scope for this release. The Reports, Authorizations, and Comments will work the same as at the CO level. See next pages for details.

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- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- Level 1 workset (2)
 - Level 2 workset (2)
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 - + 6081234 Project Name here
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 - + 6081236 Project Name here
 - 6081234 Photonic Bandgap Structures ☆
 - Forecast: Default forecast
 - Forecast: User generated forecast
 - Forecast: User generated forecast
 - + Other Level 3 workset (2)
 - + Other Level 2 workset (2)

- + NAME OF A COLLECTION/WORKSET (10)
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Darcy, John (PI)

Dec 2010-Sept 2013
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[Budget & People](#) |
 [Forecasts](#) |
 [Reports](#) |
 [Authorizations](#) |
 [Tables and Charts](#) |
 [Summary](#) |
 [Comments](#)

Budget & People

PY 1 Start date – End date |
 Budget (default budget) |
 Forecast (default forecast)

Cost Categories	Authorized total	Actuals	Actuals + Planned▼	Previous Month	Available
Direct Costs	\$19,020,000	\$19,020,000	\$19,020,000	\$19,020,000	\$100,000
+ Salary & Wages	\$240,000	\$40,000	\$100,000	\$140,000	\$100,000
Materials & Services	\$260,000	\$60,000	\$100,000	\$160,000	(\$100,000)
Publication Materials	\$220,000	\$20,000	\$100,000	\$120,000	\$100,000
Consultant Services	\$240,000	\$40,000	\$100,000	\$140,000	\$100,000
Computer Services	\$260,000	\$60,000	\$100,000	\$160,000	\$100,000
Subawards	\$240,000	\$40,000	\$100,000	\$140,000	\$100,000
Other	\$260,000	\$60,000	\$100,000	\$160,000	\$100,000
Total	\$240,000	\$40,000	\$100,000	\$140,000	(\$100,000)

People	Appointment	Start	End	%	Cost
Smith, John (PI) (!)	Principal Investigator	1/1/2012	11/1/2012	3	\$150,000
Beck, William	Research Assistant	1/1/2012	11/1/2012	40	\$100,000
Beck, William	Research Assistant	1/1/2013	11/1/2014	80	\$100,000
Berkowitz, Lee	Post Doc	1/1/2012	11/1/2012	40	\$100,000
Total					\$450,000

Cost Object: Budget & People

NOTES

People table
Cost is monthly salary times percentage.



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- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- Level 1 workset (2)
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Budget & People | **Forecasts** | Reports | Authorizations | Tables and Charts | Summary | Comments

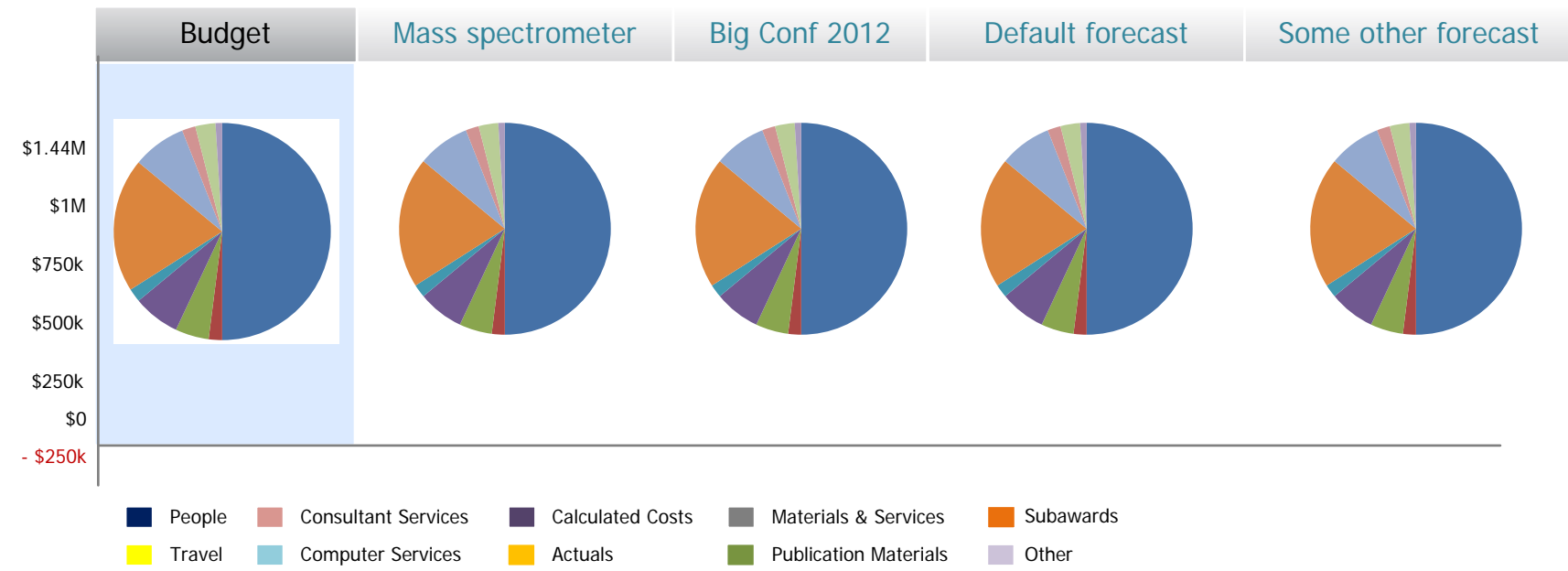
Forecasts

Name:

Description:

Add new forecast

	Forecast name	Description	Last modified	
✓	Default forecast	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor	09/27/2012 at 11:40 am mberger	✕
✓	Big conf 2012	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor	09/27/2012 at 11:40 am mberger	✕
✓	Mass spectrometer	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor	09/27/2012 at 11:40 am mberger	✕
✓	Some other forecast	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor	09/27/2012 at 11:40 am mberger	✕



Cost Object: Forecasts

NOTES

All COs have a default forecast to start. The list will never be empty unless the user explicitly deletes all of the forecasts.

New forecasts can be created here. They are all based on the base budget. New ones are added by giving them a name and description. The users then selects the forecast from the table to navigate to it for editing.

Forecasts are automatically added to the compare table below (assuming there are really only about 3-6 active ones at any given time). Note, this page will likely scroll horizontally (unless the bars are really narrow).

Users should get the warning dialog if they delete forecasts.

The compare table allows them to see the roll up of GLs here with the ability to drill to the workbook view with details. The workbook view should look and behave the same as it does now.

How many bars will there be on the chart? Plan for 10 colors.



Reporting and Forecasting Tool

Cost Object: Reports

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- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- Level 1 workset (2)
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 [Forecasts](#)
 [Reports](#)
 [Authorizations](#)
 [Tables and Charts](#)
 [Summary](#)
 [Comments](#)

Reports

New reports can be created in Cognos and viewed here in RAFT.

[Go to Cognos to create a new report.](#)

Report Name	Category	Excel	CSV	PDF
Report A	Category ABC			
Report B	Category 123			
Report C	Category ABC			
Report D	Category 123			

NOTES

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- + WAVES AND BEAMS (3)
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 - + 6081234 Project Name here
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- + NAME OF A COLLECTION/WORKSET (10)

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 [Forecasts](#)
 [Reports](#)
 [Authorizations](#)
 [Tables and Charts](#)
 [Summary](#)
 [Comments](#)

Authorizations

Search for people

Person	Permissions						
Apple, Amy	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Forecast expense	<input checked="" type="checkbox"/> View expense	<input checked="" type="checkbox"/> Forecast people	<input checked="" type="checkbox"/> View people	<input checked="" type="checkbox"/> Comment	✕
Banana, Bob	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Forecast expense	<input type="checkbox"/> View expense	<input type="checkbox"/> Forecast people	<input type="checkbox"/> View people	<input type="checkbox"/> Comment	✕
Carrot, Carol	<input type="checkbox"/> All	<input type="checkbox"/> Forecast expense	<input checked="" type="checkbox"/> View expense	<input checked="" type="checkbox"/> Forecast people	<input checked="" type="checkbox"/> View people	<input checked="" type="checkbox"/> Comment	✕
Donut, Donnie	<input type="checkbox"/> All	<input type="checkbox"/> Forecast expense	<input type="checkbox"/> View expense	<input type="checkbox"/> Forecast people	<input type="checkbox"/> View people	<input type="checkbox"/> Comment	✕

Cost Object: Authorizations

NOTES

The person search will use the type ahead search feature with autocomplete after 3 characters. The user must select a person and then explicitly click Add.

All should work as a toggle. When it's selected, the other checkboxes should be disabled.

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Cost Object: Summary

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- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- Waves and Beams (3)
 - + 6081234 Project Name here
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 - Default forecast
 - User generated forecast
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- + NAME OF A COLLECTION/WORKSET (10)

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 [Forecasts](#)
 [Reports](#)
 [Authorizations](#)
 [Tables and Charts](#)
 Summary
 [Comments](#)

Summary

Overview	
Supervisor	Norford/Leslie Keith
Addressee	Chamberlain/Rebecca L
Profit Center	PO31000 Architecture
Fund Center	Norford/Leslie Keith, PO31000 Architecture
Type	Project WBS
Admin Flag	FC
Prime Sponsor	NSF
Sponsor	Boston University
Sponsor Type	Institute of Higher Education
Contract Code	GC20814NGA

Date Range	
Eff Date	08/15/2010
Exp Date	07/31/2014
Final Exp	07/31/2014

Contract	
Agreement Type	1
Prrn Sponsor Type	Federal
Award Number	018760-001
Award Type	Grant

Financials	
Cost Sheet	Research MTDC On Campus
Total Budget	\$821,251
Total Revenue	\$19,832
Total Expenses	\$36,122
Open Committments	\$40,358
Current Balance	\$768,129
Projected Balance	\$744,771

NOTES

Grant rules will go here when they are added.

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Darcy, John (PI)

Dec 2010-Sept 2013

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Budget & People	Forecasts	Reports	Authorizations	Tables and Charts	Summary	Comments
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Comments

Name

Description

09/27/2012 at 11:40 am by mberger

This is the name of the comment

This is the body area of the comment here it can go on for quite a bit.

59/27/2012 at 11:40 am by mberger

This is the name of the comment

This is the body area of the comment here it can go on for quite a bit.

59/27/2012 at 11:40 am by mberger

This is the name of the comment

This is the body area of the comment here it can go on for quite a bit.

Cost Object: Comments

NOTES

List comments in reverse chrono order—most recent at the top of the list. The whole page can scroll so we don't need an internal scroll bar. We just need some kind of style/indicator to separate individual comments.

We also need some kind of growl to show the new/edited comment at the top of the list has been added/changed.

If there are no comments, just show the form at the top.

Editing should happen inline when users click the Edit button. Users can only edit and delete their own comments and comments on objects they own. We do an auth check before showing the edit and delete buttons.

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HOME > Waves & Beams

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Darcy, John (PI)

Dec 2010-Sept 2013

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Comments

Title

Description

09/27/2012 at 11:40 am by mberger

This is the title of the comment

This is the body area of the comment here it can go on for quite a bit.

59/27/2012 at 11:40 am by mberger

This is the title of the comment

This is the body area of the comment here it can go on for quite a bit.

59/27/2012 at 11:40 am by mberger

This is the title of the comment

This is the body area of the comment here it can go on for quite a bit.

Cost Object: Comments

(edit)

NOTES

An edited comment pops to the top of the list because it is the most recent comment (post change).

We also need some kind of growl to show the new/edited comment at the top of the list has been added/changed.



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Photonic Bandgap Structures (ABC1234) Forecasting

* required for forecast

Name* Show actuals and commitments

Description Start date End date

People + 12 items (expand)

▶▶ Monthly allocation view

Name	Appointment	Pay rate*	Start date*	End date*	Allocation*	Comment	
13		\$ / hr			% or hrs / week		✕ \$0.00
							People cost line 1 \$00.00
							People cost line 2 \$00.00
							People total cost \$00.00

Travel — 3 items (collapse)

Name	Description	Start date	End date	Cost*	
1 Name of the thing	Long, not required, description of this item	01/02/2013	01/02/2013	\$ 2,000	✕ \$0.00
2 Name of the thing	Long, not required, description of this item	01/02/2013	01/02/2013	\$ 2,000	✕ \$0.00
3 Name of the thing	Long, not required, description of this item	01/02/2013	01/02/2013	\$ 2,000	✕ \$0.00
4				\$	✕ \$0.00

Travel cost line 1 \$00.00
 Travel cost line 2 \$00.00
Travel total cost \$00.00

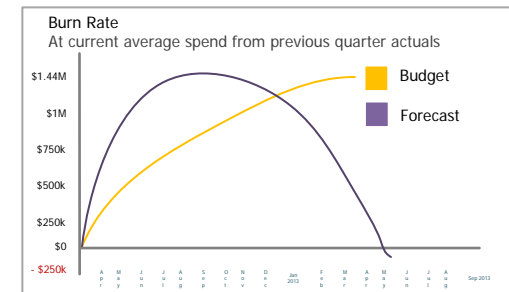
Total expenses \$00.00
 Total revenue \$00.00
Remaining \$00.00

Save Save and close

Forecast Totals

Balance on end is negative

Budget \$1,440,000
 Actuals - \$840,000
 Revenue +40,000
Forecast - \$6,000
Remainder (\$594,000)



Build a Forecast

Double click a favorite item and it will be added to your forecast.

- People (Salary & Wages)
 - Smith, Adam
 - Smith, John
 - Smith, Nancy
- Travel
- Equipment
- Materials and services
- Publication materials
- Consultant services
- Computer services
- Subawards
- Revenue

Forecasting

NOTES

Actuals and commitments—whatever information we have—should automatically be added to a forecast and appear as line items under the appropriate GLs. The existing information will be open by default. Users can select to close the individual sections or they can open/close all sections using the box at the top.

By default, below the actuals, we should show 1 empty line so users can begin adding a new item without having to click anything.

Users can add as much or as little information as they have to each item, then click Return or Tab which will add a new item below.

Users can also double click from the Build a Forecast box to add new items. **We need to determine what goes in that list.**

GL item totals appear below the GLs blocks as breaks between GL sections. The Forecast total will appear both at the bottom of the page and in the right-hand column for easy viewing.

We need the rescue box in case users navigate away from the page without saving.

The totals box will follow them down the page as they scroll.

The Save and Close button returns them to the forecast list/compare page.

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HOME > Waves & Beams >

Photonic Bandgap Structures (ABC1234) Forecasting

* required for forecast

Name* Show actuals and commitments

Description Start date End date

People + 12 items (expand)

▶▶ Monthly allocation view

Name	Appointment	Pay rate*	Start date*	End date*	Allocation*	Comment	
13		\$ / hr			% or hrs / week		✕ \$0.00
							People cost line 1 \$00.00
							People cost line 2 \$00.00
							People total cost \$00.00

Travel — 3 items (collapse) **There is something wrong with your selection. Lorem ipsum dolor sit amet.**

Name	Description	Start date	End date	Cost*	
1 Name of the thing	Long, not required, description of this item	01/02/2013	01/02/2013	\$ 2,000	✕ \$0.00
2 Name of the thing	Long, not required, description of this item	01/02/2013	01/02/2013	\$ 2,000	✕ \$0.00
3 Name of the thing	Long, not required, description of this item	01/02/2013	01/02/2013	\$ 2,000	✕ \$0.00
4				\$	✕ \$0.00

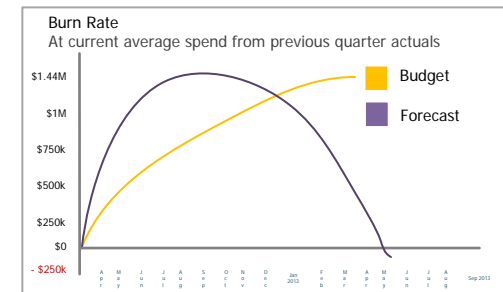
Travel cost line 1 \$00.00
 Travel cost line 2 \$00.00
Travel total cost \$00.00

Total expenses \$00.00
 Total revenue \$00.00
Remaining \$00.00

Forecast Totals

System alerts and forecast level alerts

Budget \$1,440,000
 Actuals - \$840,000
 Revenue +40,000
 Forecast - \$6,000
 Remainder (\$594,000)



Build a Forecast

Double click a favorite item and it will be added to your forecast.

- People (Salary & Wages)
 - Smith, Adam
 - Smith, John
 - Smith, Nancy
- Travel
- Equipment
- Materials and services
- Publication materials
- Consultant services
- Computer services
- Subawards
- Revenue

Forecasting with errors

NOTES

- Field level validation should happen at the fields. The field should be highlighted and the cursor should have focus on the first invalid form field. Messages should appear at the top of the relevant section.
- Notifications they opted in for should appear at the field or as close to it as possible. Messages should appear at the top of the relevant section.
- If something is wrong at the forecast level, if something in this forecast affects other budgets or system level things or business things inside or outside this context, the alert flag should appear in the totals box.

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Person

NOTES

If you click to expand monthly allocation here, you get the view-only mode. Allocations have to be adjusted within the context of a forecast.

One appointment can have multiple cost objects; need monthly allocation view. The appointment information is primary.

I would like to show the appointment information as a header rather than a grid. We need to show a hierarchy. The grid makes that tough.

[HOME >](#)

Mary Catherine Dunne (PI) Alert message

\$100,000

- Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Suspendisse scelerisque tincidunt neque, vitae malesuada sem posuere nec.
- Etiam in sapien eget odio tempor sollicitudin nec nec sapien.
- Nulla condimentum nibh in nulla ultricies hendrerit.
- Sed nec sem sed ipsum vestibulum pellentesque.

Cost Objects per Appointment

1/1/2012 - 11/1/2012

Principal Investigator Sub/type \$3083.33 12/9/hourly

Cost Object	Forecast	Start date	End date	Hours	%	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
6071234 Photonic Structures	Default forecast <input type="button" value="v"/>	1/1/2012	11/1/2012	8	20	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>
6071234 Co Name	Default forecast <input type="button" value="v"/>	1/1/2012	6/1/2012	36	80	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>
6071234 Co Name	Default forecast <input type="button" value="v"/>	1/1/2012	11/1/2012	8	20	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>

1/1/2011 - 11/1/2011

Principal Investigator Sub/type \$3083.33 12/9/hourly

Cost Object	Forecast	Start date	End date	Hours	%	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
6071234 Co Name	Default forecast <input type="button" value="v"/>	1/1/2012	11/1/2012	8	20	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>
6071234 Co Name	Default forecast <input type="button" value="v"/>	1/1/2012	6/1/2012	36	80	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>	<input type="text" value="80"/>
6071234 Co Name	Default forecast <input type="button" value="v"/>	1/1/2012	11/1/2012	8	20	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>



User Interface Specifications

MIT RAFT

Last updated: 12/4/2012



Reporting and Forecasting Tool

MY RAFT | Pls | [department] | Shared

Search

Advanced search

- >> NAME OF A COLLECTION/WORKSET (12)
- >> NAME OF A COLLECTION/WORKSET (5)
- >> NAME OF A COLLECTION/WORKSET (7)
- >> NAME OF A COLLECTION/WORKSET (12)
- >> NAME OF A COLLECTION/WORKSET (10)

Welcome back, Mike ☆ [Favorites](#) | [Preferences](#) ([log out](#))

Advanced search takes users to a new page. The left nav will collapse on this new page.

These two links open drop-down menus from which a user will make a selection and go to a new page.

This nav will use an expand/collapse control and open in the designated space

GENERAL RULES ON NAVIGATION

Hyperlinks take users to a new page—or they open a drop-down menu full of options. Those options are hyperlinks which navigate users to a new page.

Buttons are for form actions. Please see specific pages for how each button works.

Tabs are for in-page navigation only. They are for switching views within a page. The left navigation top level sort of works as tabs as well, shifting the view of the navigation options.

GENERAL RULES ON MESSAGING

System messages appear at the top of the home page.

Form validation messages appear at the top of the form AND at the form field. A general message should alert the user to an error and the form should bring the focus to the first error. Fields with errors should be highlighted.

Changes to a forecast that cause problems with that forecast or some other budget or business rule should appear in the totals area that floats in the right column of the forecast page.

Please see the Forecasting with errors page for examples.

Template

NOTES

- 1. Branding**
We will include a space at the top for the name of the application using a simple type treatment.
- 2. Cost Object Navigation**
This will default to My RAFT, the user's collections. See modules for detailed description.
- 3. Search**
The basic search will work as it does now. When a user types 3 characters, the site will begin to return results. Collections, cost objects, and people will show up in the results. They will include different information that will cue users to the type of result. See modules for more.
- 4. Welcome message**
The welcome message will include the user's first name and a link to log out. The log out link will end the user's session and return the user to the log in screen.
- 5. Footer**
The footer will appear on every page of the site and include links to basic pages that talk about the application and provide help.

Default to the MY RAFT tab

Open the navigation pane when users hover

MY RAFT	PIs	[department]	Shared
---------	-----	--------------	--------

MY RAFT	PIs	[department]	Shared
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (3)			
» NAME OF A COLLECTION/WORKSET (12)			

MY RAFT	PIs	[department]	Shared
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (12)			
» Waves and Beams (3)			
6081234 Project Name here 6081235 Project Name here 6081236 Project Name here			
» NAME OF A COLLECTION/WORKSET (12)			

MY RAFT	PIs	[department]	Shared
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (12)			
» NAME OF A COLLECTION/WORKSET (12)			
» Waves and Beams (3)			
6081234 Project Name here Forecast: Name of the forecast Forecast: Name of the forecast Forecast: Name of the forecast 6081235 Project Name here 6081236 Project Name here			
» NAME OF A COLLECTION/WORKSET (12)			

MY RAFT	PIs	[department]	Shared
---------	-----	--------------	--------

MY RAFT	PIs	[department]	Shared
» Abel, John (PI)			
» Bain, John (PI)			
» Cain, John (PI)			
» Dame, John (PI)			
» Eames, John (PI)			

MY RAFT	PIs	[department]	Shared
» Abel, John (PI)			
» Bain, John (PI)			
» Cain, John (PI)			
» Dame, John (PI)			
6081234 Project Name here 6081235 Project Name here 6081236 Project Name here			
» Eames, John (PI)			

Alerts & Favorites
We should mark alerts and favorites in the navigation so users have an alternate means for finding this information.

Hierarchy
Collections/Worksets and Cost Objects/Projects can be nested as many levels as the user selects. Users should be encouraged to keep the nesting simple for the sake of their own management.

Forecasts can appear at the Workset (in a future release)) and Cost Object levels. They should be marked with the word "Forecast" pre-pended to the user generated name of the forecast.

MY RAFT	PIs	[department]	Shared
---------	-----	--------------	--------

MY RAFT	PIs	[department]	Shared
» General Budget			
» Internal Orders			
» Bain, John (PI)			
» Cane, John (PI)			
» Mane, John (PI)			

MY RAFT	PIs	[department]	Shared
» General Budget			
» Internal Orders			
» Bain, John (PI)			
» Dame, Jane (PI)			
6081234 Project Name here 6081235 Project Name here 6081236 Project Name here			
» Mane, John (PI)			

MY RAFT
This is the tab with my custom worksets or the worksets assigned to me by my boss. All approved cost objects appear here. The default is an "uncategorized" workset that has everything.

PIs
List cost objects by PI.

[department]
For department tab—default to the department specific view; use School of Science view as default.

Shared
This tab is optional. Projects will be promoted to this tab as they are shared with other team members. This tab will not appear if a user does not have any shared projects.

Reporting and Forecasting Tool

MY RAFT

PIs

[department]

Shared

>> NAME OF A COLLECTION/WORKSET (12)

>> NAME OF A COLLECTION/WORKSET (5)


>> NAME OF A COLLECTION/WORKSET (7)

>> NAME OF A COLLECTION/WORKSET (12)




>> NAME OF A COLLECTION/WORKSET (10)

Search

[Advanced search](#)

Welcome back, Mike  [Favorites](#) [Preferences](#)
[\(log out\)](#)

Favorites

- Lucius Gallery (PI) 
- Lucius Gallery's Personal Collection (3) 
- 6091234 The Lucifer Project 

Click to un-favorite

The Favorites menu at the top will work like a drop-down and open to a list in alphanumeric order of PIs, worksets, and cost objects.

Reporting and Forecasting Tool

MY RAFT

PIs

[department]

Shared

Search

[Advanced search](#)

>> NAME OF A COLLECTION/WORKSET (12)

>> NAME OF A COLLECTION/WORKSET (5)

>> NAME OF A COLLECTION/WORKSET (7)

>> NAME OF A COLLECTION/WORKSET (12)

>> NAME OF A COLLECTION/WORKSET (10)

Welcome back, Mike ☆ [Favorites](#) [\(log out\)](#)

Preferences

- [Alert preferences](#)
- [Sharing preferences](#)
- [Workset preferences](#)
- [Create a new workset](#)

Preferences

The Preferences menu at the top will work like a drop-down and open to a list of preferences options in alpha order, with create a workset at the bottom of the list.

Create a Workset

We will do this on a separate page as it is done now. This page will keep the left nav so users can see the new workset pop into the list. This will need some kind of visual growl on it so it's really noticeable to users.

They can either click the new one from the left nav or continue making new worksets as needed.

You can also create a workset from the advanced search page as you do now.

Reporting and Forecasting Tool

MY RAFT

PIs

[department]

Shared

>> NAME OF A COLLECTION/WORKSET (12)

>> NAME OF A COLLECTION/WORKSET (5)

>> NAME OF A COLLECTION/WORKSET (7)

>> NAME OF A COLLECTION/WORKSET (12)

>> NAME OF A COLLECTION/WORKSET (10)

luc

Search

Lucius Gallery (PI)
Lucius Gallery's Personal Collection (3)
6091234 The Lucifer Project

Welcome back, Mike ☆ [Favorites](#) | [Preferences](#)
[\(log out\)](#)

Simple Search

NOTES

Simple Search

This module will work as it does in the application now. Users will type 3 characters and then the results will begin to appear.

PIs should be marked as PIs (e.g., Lucius Gallery (PI))

Cost objects are denoted by the project number which appears at the beginning of the cost object name (e.g., 6012345 Bandgap Structures)

MY RAFT

PIs

[department]

Shared

Search

Welcome back, Mike ☆ [Favorites](#) | [Preferences](#)
[\(log out\)](#)

Advanced search

Advanced search results

Search results go here

Advanced search options go here

Advanced Search

NOTES

Advanced Search

We will do this on a separate page as it is done now. The advanced search options stay the same as they are now. Search results show in the content area.

In current version complex searches will not be saved, maybe in the future.

Out of Scope

MIT RAFT

Last updated: 12/4/2012



Reporting and Forecasting Tool

MY RAFT Pls [department] Shared

- + NAME OF A COLLECTION/WORKSET (12)
- + NAME OF A COLLECTION/WORKSET (5)
- + WAVES AND BEAMS (3)
- Waves and Beams (3)
 - + 6081234 Project Name here
 - + 6081235 Project Name here
 - + 6081236 Project Name here
 - 6081234 Photonic Bandgap Structures ☆ 🚩
 - Default forecast
 - User generated forecast
 - User generated forecast
- + NAME OF A COLLECTION/WORKSET (10)

 Search

[Advanced search](#)

Welcome back, Mike ☆ [Favorites](#) | [Preferences](#) [\(log out\)](#)

HOME > Waves & Beams

6091234 Photonic Bandgap Structures ☆ 🚩 Alert message

& Darcy, John (PI)

Dec 2010-Sept 2013

Funded by the National Academy of Sciences

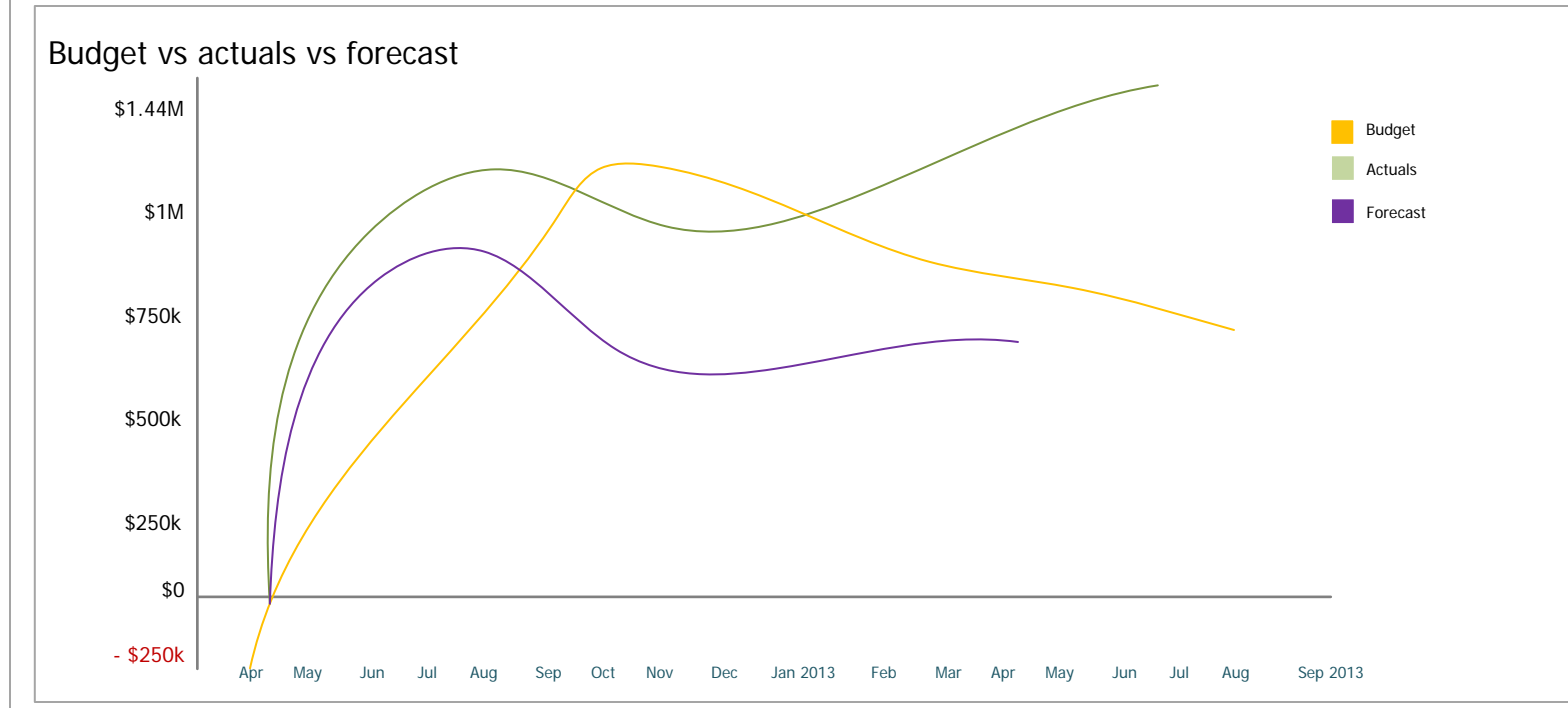
[Budget & People](#)
 [Forecasts](#)
 [Reports](#)
 [Authorizations](#)
 [Tables and Charts](#)
 [Summary](#)
 [Comments](#)

Tables and Charts

PY 1 Start date – End date

 Budget (default budget)

 Forecast (default forecast)



Cost Object: Tables and charts

NOTES

OUT OF SCOPE FOR THIS RELEASE

Reporting and Forecasting Tool

My RAFT | Pls | [department] | Shared

 Search
[Advanced search](#)

Welcome back, Mike ☆ [Favorites](#) | [Preferences](#) | [log out](#)

Create a Workset Forecast

NOTES

HOME > Waves & Beams

Create a Forecast

* required for forecast

Name of forecast*

Start date*

End date*

Short description

Show actuals and commitments

People 3 people ▲

Name	Appointment	11/2012	12/2012	1/2013	2/2013	3/2013	4/2013	5/2013	6/2013	7/2013		
1 Apple, Amy (PI)	Principal Investigator	20%									▶▶	✕ 5000.00
2 Dean, James	Research Assistant	20%									▶▶	✕ 5000.00
3 Smith, John	Research Assistant	20%									▶▶	✕ 5000.00
People subtotal												

Add new person

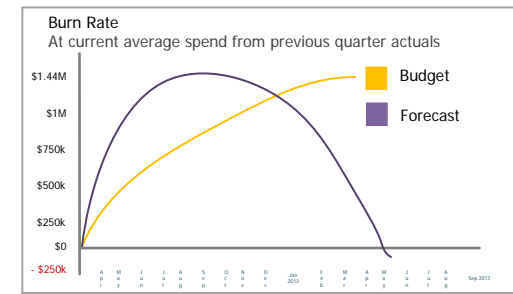
Name	Appointment	Pay rate*	Start date*	End date*	Allocation*	Comment	
4 <input type="text"/>	<input type="text"/>	\$ <input type="text"/> / hr	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> % or hrs <input type="text"/> / week	<input type="text"/>	▶▶ ✕ \$0.00
new people subtotal							

Total expenses	\$00.00
Total revenue	\$00.00
Remaining	\$00.00

Forecast Totals

Balance on end is negative

Budget	\$1,440,000
Actuals	- \$840,000
Revenue	+40,000
Forecast	- \$6,000
Remainder	(\$594,000)



OUT OF SCOPE FOR V1

Need to show which cost objects the person is assigned to. It's a many situation

Need to ID which cost object in a workset a person is assigned to

Need a way to add a person and then multiple cost objects on a person

Reporting and Forecasting Tool

My RAFT | Pls | [department] | Shared

 Search

Welcome back, Mike ☆ [Favorites](#) | [Preferences](#) | [log out](#)

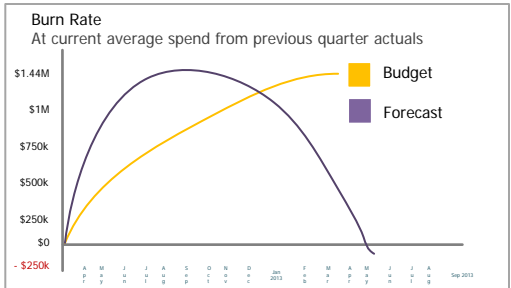
HOME > Waves & Beams > Photonic Bandgap Structures (ABC1234)

Edit a Forecast

* required for forecast

Name of forecast* Start date* End date*

Short description

 Show actuals and commitments


Adjust allocation for workset forecasting

NOTES

They need a summary so they can see what they are totaling to by salary by percentage. And totals

This may be doable within the page rather than a pop-up depending on which version of create/edit forecast we use.

People 12 people + Add another person Lorem \$45,000

Name

Travel

Name of traveler

1 + Add another person to this trip

2 + Add another person to this trip

3 + Add another person to this trip

4 + Add another person to this trip

Adjust allocation for

Rick Astley

Project	Appt	Start date	End date	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
6081234 Project name	RA	1/1/2012	11/1/2012	20	20	20	20	20	20	20	20	20
6081235 Project name	RA	1/1/2012	6/1/2012	80	80	80	80	80	80	80		
6081236 Project name	Post Doc	1/1/2012	11/1/2012	20	20	20	20	20	20	20	20	20
Totals				120	120	120	120	120	120	120		

Total expenses \$00.00
 Total revenue \$00.00
 Remaining \$00.00