

Enterprise Reporting UF Sponsored Research

What is available now to PIs?

What are we working on?

What is available now?

Monthly Financial Reports

- PI Summary
 - Budget Category Details
 - Projected Payroll Employee Summary
 - Managerial/Executive Tool
- Grant Summary
 - Budget Account Details
 - MTD Activity
 - Reconciliation Tool
- Supporting Detail Reports

PI Summary

Budget Categories - Description	Project to Date Budget	Project to Date Expenses	Commitments	Available Balance
PERSON - Personnel - Salary	\$46,114.00	\$25,669.33	\$4,232.22	\$16,212.45
FRINGE - Fringe Benefits - Personnel	\$0.00	\$7,240.73	\$1,197.72	(\$8,438.45)
OTPERS - OPS & Other Personnel	\$0.00	\$4,752.80	\$0.00	(\$4,752.80)
UNGRAD - Undergraduate Students	\$0.00	\$25.60	\$0.00	(\$25.60)
OTHER - Other Expenses	\$1,000.00	\$0.00	\$0.00	\$1,000.00
SUPL - Materials and Supplies	\$300.00	\$0.00	\$0.00	\$300.00
DOTRAV - Domestic Travel	\$4,500.00	\$104.00	\$0.00	\$4,396.00
DIR - Direct Total	\$51,914.00	\$37,792.46	\$5,429.94	\$8,691.60
FACADM - Facilities and Administration	\$24,140.00	\$17,573.51	\$6,566.49	\$0.00
INDIR - Indirect Total	\$24,140.00	\$17,573.51	\$6,566.49	\$0.00
00080153-201-34050200 Total Direct & Indirect	\$76,054.00	\$55,365.97	\$11,996.43	\$8,691.60

Employee ID	Empl. Rec. Number	Employee Name	Distribution Begin	Distribution End	Distribution %	Pay Per. Remaining	Projected Personnel Costs
70167110	0	LOGAN,HENRIETTA NYE	12/24/2010	05/31/2011	5%	11	4,091.85
70167110	1	LOGAN,HENRIETTA NYE	12/24/2010	05/31/2011	5%	11	453.21
70167110	0	LOGAN,HENRIETTA NYE	06/01/2011	06/30/2011	5%	2	796.64
70167110	1	LOGAN,HENRIETTA NYE	06/01/2011	06/30/2011	5%	2	88.24
00080153-201-34050200 Total Projected Personnel Costs							\$5,429.94

Executive Available Balance Summary

- What is left to spend?

Projected Payroll List

- Who am I paying on this grant? How much?

Grant Summary

Account Descriptions	Project to Date Budget	Project to Date Expenses	Commitments	Available Balance	Fiscal YTD Expenses	MTD Expenses
OTH OPR EXPENSE						
771100 IN STATE TRAVEL		104.00	0.00		104.00	0.00
771200 OUT OF STATE TRAVEL		0.00	0.00		0.00	0.00
Subtotal Domestic Travel		\$104.00	\$0.00		\$104.00	\$0.00
Subtotal TRAVEL		\$104.00	\$0.00		\$104.00	\$0.00
Subtotal OTH OPR EXPENSE		\$104.00	\$0.00		\$104.00	\$0.00
Subtotal DIRECT	\$51,914.00	\$37,792.46	\$5,429.94	\$8,691.60	\$12,483.76	\$804.43
INDIRECT						
F&A						
812000 FACILITIES & ADMIN (C&G ONLY)		17,573.51	(17,573.51)		5,804.95	374.05
INDIR FAC & ADMIN (3) - BUDGET ONLY	24,140.00	0.00	24,140.00		0.00	0.00
Subtotal Facilities and Administration	\$24,140.00	\$17,573.51	\$6,566.49		\$5,804.95	\$374.05
Subtotal F&A	\$24,140.00	\$17,573.51	\$6,566.49	\$0.00	\$5,804.95	\$374.05
Subtotal F&A	\$24,140.00	\$17,573.51	\$6,566.49	\$0.00	\$5,804.95	\$374.05
Subtotal INDIRECT	\$24,140.00	\$17,573.51	\$6,566.49	\$0.00	\$5,804.95	\$374.05
00080153~201~34050200 Total Direct and Indirect	\$76,054.00	\$55,365.97	\$11,996.43	\$8,691.60	\$18,288.71	\$1,178.48

Account Balances

- Does this activity look reasonable?

Future Considerations

- Burn Rate

Summary Headers

Cost Center: 00080153~201~34050200 (Project~Fund~Department)

Direct Available Balance **\$8,691.60**

Award Information

Contract ID (Type): 00072941 - Cost Reimbursable - Non LOC
Sponsor: UNIV OF CHICAGO
Award PI: 70167110 - Logan, Henrietta Nye
Award Ref #: 42932-F

Issue Date: 12/22/2009
Award Title: Evaluation of the Efficacy and Cost Effectiveness of Ora
Award Period: 09/28/2009 - 08/31/2011
Award Amount: \$128,319.00

Project Information

Project PI/Manager: 70167110 - Logan, Henrietta Nye
Project Amount: \$76,054.00

Spending Period: 09/28/2009 - 08/31/2011
Cost Sharing: N
F&A Base & Rate: MTDC - 46.50%

Code:	Expires:	Assurance:	Exempt:	Code:	Expires:	Assurance:	Exempt:
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- Available Balance
- Award Information Summary
- Project Information Summary
- IACUC/IRB Certification Summary

Report Search

Search Criteria	
Department:	begins with <input type="text"/> <input type="button" value="🔍"/>
Fund Code:	begins with <input type="text"/> <input type="button" value="🔍"/>
Department Flex:	begins with <input type="text"/> <input type="button" value="🔍"/>
Project:	begins with <input type="text"/> <input type="button" value="🔍"/>
PI:	begins with <input type="text" value="70167110"/> <input type="button" value="🔍"/>
Report Type(s):	<input type="button" value="Search"/> <input type="checkbox"/> Select All
<input type="checkbox"/> Appropriations Summary	<input type="checkbox"/> Cash Summary
<input type="checkbox"/> Construction Summary	<input type="checkbox"/> Grant Summary
<input type="checkbox"/> Housing Fund Summary	<input type="checkbox"/> KK to GL Summary Comparison
<input type="checkbox"/> Open Encumbrance Summary	<input type="checkbox"/> Payroll Cost Distribution Run Date Detail
<input checked="" type="checkbox"/> Payroll Reconciliation Detail	<input checked="" type="checkbox"/> PI Summary
<input type="checkbox"/> Projected Payroll Cost Distribution	<input checked="" type="checkbox"/> Projected Payroll Detail
<input checked="" type="checkbox"/> Transaction Detail	

Quickly find the reports you want for your project(s)...

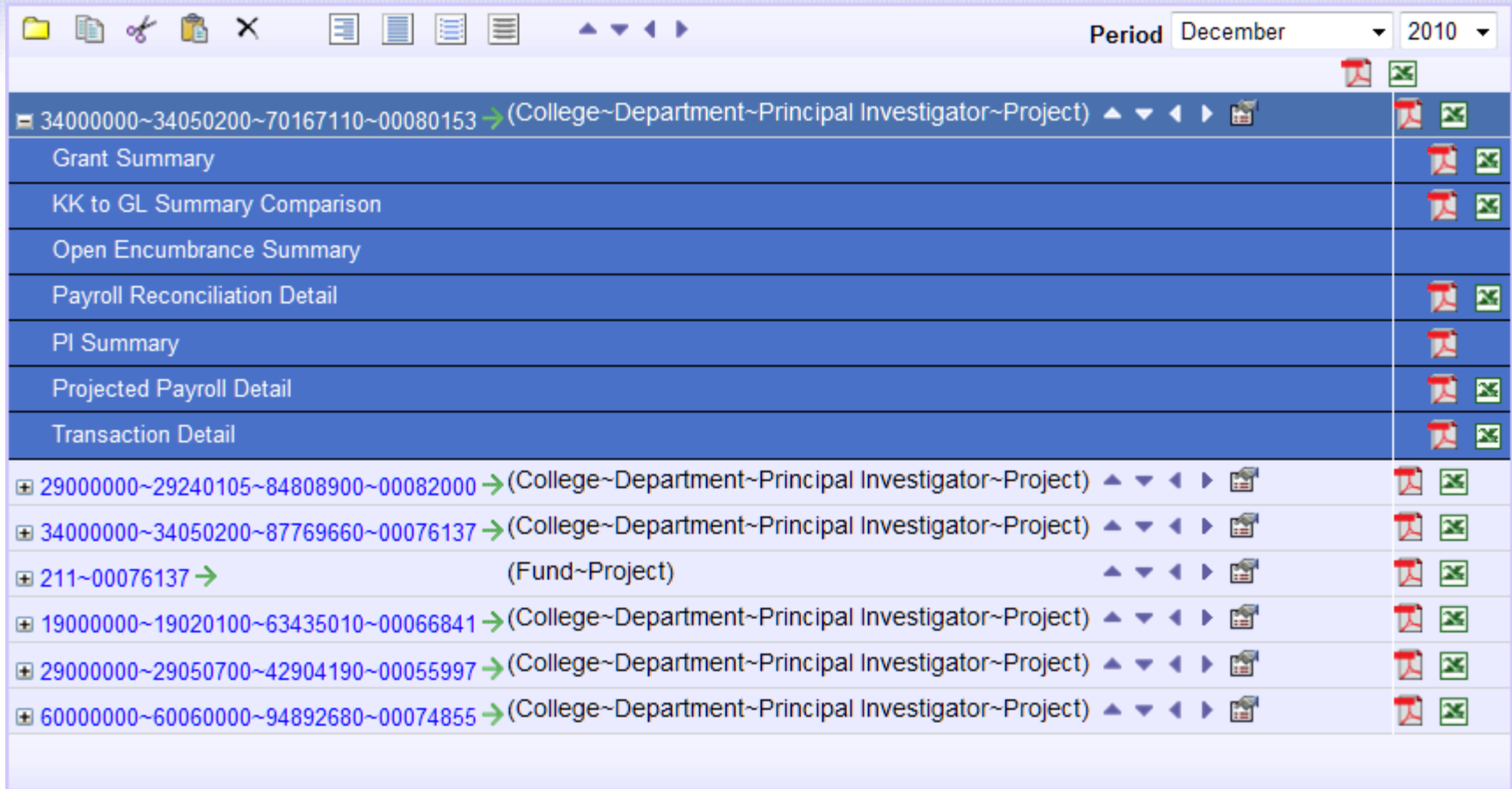
Search Results

		Period	December	2010		
34000000~34050200~70167110~00080153	→	(College~Department~Principal Investigator~Project)				
Payroll Reconciliation Detail						
PI Summary						
Projected Payroll Detail						
Transaction Detail						
34000000~34050200~70167110~00081616	→	(College~Department~Principal Investigator~Project)				
Payroll Reconciliation Detail						
PI Summary						
Projected Payroll Detail						
Transaction Detail						
34000000~34050200~70167110~00083130	→	(College~Department~Principal Investigator~Project)				
Payroll Reconciliation Detail						
PI Summary						
Projected Payroll Detail						
Transaction Detail						

Run reports directly from the search results...

Add them to your My Reports page so you no longer have to search...

My Reports



		Period	December	2010
34000000~34050200~70167110~00080153 → (College~Department~Principal Investigator~Project)				
	Grant Summary			
	KK to GL Summary Comparison			
	Open Encumbrance Summary			
	Payroll Reconciliation Detail			
	PI Summary			
	Projected Payroll Detail			
	Transaction Detail			
29000000~29240105~84808900~00082000 → (College~Department~Principal Investigator~Project)				
34000000~34050200~87769660~00076137 → (College~Department~Principal Investigator~Project)				
211~00076137 → (Fund~Project)				
19000000~19020100~63435010~00066841 → (College~Department~Principal Investigator~Project)				
29000000~29050700~42904190~00055997 → (College~Department~Principal Investigator~Project)				
60000000~60060000~94892680~00074855 → (College~Department~Principal Investigator~Project)				

All of the reports you want in one place...
Quickly bundle a set of reports in one PDF file...

Financial Information Tool

Available Balance (AB) as values	<u>AB KK Budget</u>	<u>AB GL Actuals</u>	<u>AB Commitments</u>	<u>AB Balance</u>
00002484 - PSYCHOLOGICAL DISTRESS AMONG L	311,831.07	311,831.07	400.00	-400.00
00023770 - ASSESSMENT OF ATTITUDES ABOUT	39,148.00	39,148.00	0.00	0.00
00023773 - ASSESSMENT OF ATTITUDES ABOUT	12,000.00	12,000.00	0.00	0.00
00023775 - ORAL CANCER DETECTION: PHASE I	14,870.07	14,870.07	0.00	0.00
00023776 - ASSESSMENT OF ORAL CANCER AWAR	72,000.00	72,000.00	0.00	0.00
00023777 - EDITORSHIP FOR THE JOURNAL OF	2,500.00	2,500.00	0.00	0.00
00023781 - PRE-EXISTING AFFECT AND PAIN R	41,608.00	41,608.00	0.00	0.00
00023783 - EDITORSHIP FOR THE JOURNAL OF	3,000.00	3,000.00	0.00	0.00
00045976 - ALLOCATION OF COLLEGE INCENTIV	0.00	10.00	0.00	-10.00
00045977 - ALLOCATION OF OVERHEAD - PI	0.00	1,090.16	0.00	-1,090.16
00048398 - PRE-EXISTING AFFECT AND PAIN R	47,296.00	47,296.00	0.00	0.00
00054573 - PRE-EXISTING AFFECT AND PAIN R	49,928.00	41,960.74	0.00	7,967.26
00058794 - Markers of Late Effects of Hea	10,000.00	9,983.43	0.00	16.57
00071002 - Research Program Administrativ	274,542.92	274,542.92	0.00	0.00
00077869 - DSR Support for SE Ctr Researc	561,842.00	100,288.74	42,392.83	419,160.43
00080153 - Recovery Act Limited Competiti	76,054.00	55,931.74	18,452.77	1,669.49
00081616 - SOUTHEAST CENTER FOR RESEARCH	919,075.73	537,388.36	32.20	381,655.17
00083130 - SOUTHEAST CENTER FOR RESEARCH	74,261.00	39,681.33	0.00	34,579.67
00088154 - SOUTHEAST CENTER FOR RESEARCH	897,619.92	216,935.42	82,409.83	598,274.67
00088158 - SOUTHEAST CENTER FOR RESEARCH	97,431.08	40,046.67	58,004.18	-619.77
00091387 - Predoctoral Training in Genera	142,706.00	557.13	23,034.54	119,114.33
70167110 - Logan, Henrietta Nye	3,647,713.79	1,862,669.78	224,726.35	1,560,317.66

Flexible, interactive tool...

See all of your projects at a high-level with drill-down capabilities...

Financial Information Tool

Available Balance (AB) as values		<u>AB KK Budget</u>	<u>AB GL Actuals</u>	<u>AB Commitments</u>	<u>AB Balance</u>
<u>Direct</u>	<u>(Blank)</u>	51,914.00	0.00	0.00	51,914.00
	<u>Personnel - Salary</u>	0.00	25,970.34	3,527.96	-29,498.30
	<u>Fringe Benefits - Personnel</u>	0.00	7,325.91	1,324.81	-8,650.72
	<u>OPS & Other Personnel</u>	0.00	4,752.80	13,600.00	-18,352.80
	<u>Undergraduate Students</u>	0.00	25.60	0.00	-25.60
	<u>Domestic Travel</u>	0.00	104.00	0.00	-104.00
	Direct	51,914.00	38,178.65	18,452.77	-4,717.42
<u>Indirect</u>	<u>(Blank)</u>	24,140.00	0.00	0.00	24,140.00
	<u>Facilities and Administration</u>	0.00	17,753.09	0.00	-17,753.09
	Indirect	24,140.00	17,753.09	0.00	6,386.91
All Accounts		76,054.00	55,931.74	18,452.77	1,669.49

Slice and dice to see the information the way you need it...

What are we working on?

- Moving queries to Enterprise Reporting
 - One query tool for campus
 - Integrated with HR data
 - Current Award Indicator
- PeopleSoft Financials 9.1 / Cognos 8
 - Next day data availability
 - 25-50% MFR processing time improvements
 - Evaluating PI Portal / Dashboards

What are we working on?

- Companion Accounts
 - Easily Track Cost Sharing
 - New Cost Sharing MFR
- UF IT
 - IT Governance
 - Paul Avery, Research Computing Chair
 - Zina Evans, Administrative Systems Chair
 - ES Business Relationships
 - Greg Dubois, Director

What are we working on?

- Effort Reporting System
 - Engaging all Campus Stakeholders
 - Online FAR
 - Awarded Project Commitments Functionality