

myInvestigator

Financial Reporting Tool

UF Faculty Senate
Thursday, November 15, 2012

AGENDA

- Project Overview

Brad Staats, Contracts & Grants

- Requirements

- Guided Tour

Stephanie Gray, Office of Research

OVERVIEW

Goal

- Deliver an intuitive tool that enables PI's to quickly review financial information for sponsored projects and find answers to questions about project finances.

OVERVIEW

Sponsors

- David P. Norton
Vice President for Research
- Matt Fajack
Vice President and CFO
- Elias G. Eldayrie
Vice President and CIO

Partners

- Enterprise Systems
- Mindtree

REQUIREMENTS

The project team interviewed more than fifty Principal Investigators from all areas of campus.

Requirements:

- Must be easy-to-use. Intuitive.
- Information must be up-to-date.
- “Why can’t it be more like my online bank account?”

Search Project(s)

Reference Award No. Project ID Project PI Name Project Dept. ID



My List(s) ▾



Portfolio Summary

Showing 47 Projects

<input type="checkbox"/>	Agency Reference ID	Project ID	Project Description	Project End Date	Budget(\$)	Balance(\$)	Health
<input type="checkbox"/>	F343366	00092715	Development of High Resolution	12/31/2012	10,500.00	5,097.32	
<input type="checkbox"/>	F74738	00076553	Long Overhead Cash	06/30/2099	3,979.46	3,979.46	
<input type="checkbox"/>	F34330	00093803	Heartworm Collection	10/03/2012	65,554.50	26,106.67	
<input type="checkbox"/>	F008352	00086573	Novel Technologies	04/08/2015	80,000.00	5,749.21	
<input type="checkbox"/>	F3423	00085801	Polymorphisms in Avian Genes C	06/30/2012	14,047.15		
<input type="checkbox"/>	F3433	00092716	Development of Low Resolution	05/05/2013	14,047.15	2,000.00	
<input type="checkbox"/>	F5489	00076553	Cloud Computing Networks	03/03/2013	90,047.15	5,000.00	
<input type="checkbox"/>	F5554	00595553	Logistics on NetworkWorm	07/03/2013	1,90,047.15	10,000.00	
<input type="checkbox"/>	F57854	5665553	Mobile OS on Network	05/03/2013	77,047.15	40,000.00	
<input type="checkbox"/>	X543454	5665553	Web services & TCIP	02/02/2013	87,047.15	3,000.00	



Search Project(s)

Reference Award No. Project ID Project PI Name Project Dept. ID

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Project Summary

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00086573 Novel Technologies

Budget End Date 01/08/2015

Sponsor UF FOU PI Long, Maureen (83734510)
 Agency ID 008352 Dept ID VM-INFECT DISEASES & PATHOLOGY (28100000)

Budget Level 3
 Project Dates 02/01/2010 - 01/08/2015

Cost Share Req. (\$)
 Cost Share Met. (\$)
 Cost Share Bal. (\$)

Protocol Expiration
 IRB
 IACUC

F & A Base
 F & A Base

Budget Category	Budget (\$)	Spent (\$)	Committed (\$)	Projected (\$)	Balance (\$)	Health
Direct						
Direct				45,466.41	(45,466.41)	
Ops & Other Personnel	5,000.00	2,500.00			2,500.00	
Graduate Students	10,000.00	9,044.40	4,213.13	2,690.50	(5,948.03)	
Direct Total	15,000.00	11,544.40	4,213.13	48,156.91	(48,914.44)	↓
Project Total	15,000.00	11,544.40	4,213.13	48,156.91	(48,914.44)	↓



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Adjust Budget

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 Agency ID 008352 Dept ID VM-INFECT DISEASES & PATHOLOGY (28100000) Project Dates 02/01/2010 - 01/08/2015

Budget Adjustments

Employee / Vendor	Source Budget (\$)	Adjusted Budget (\$)	Variance (\$)
Direct	18,000.00		18,000.00
Personnel - Salary		<input type="text" value="10,000.00"/>	(10,000.00)
Ops & Other Personnel		<input type="text" value="5,000.00"/>	(5,000.00)
Graduate Students		<input type="text" value="3,000.00"/>	(3,000.00)
Other Expenses		<input type="text" value="5,000.00"/>	(5,000.00)
Subrecipients > \$25k		<input type="text" value="40,000.00"/> <input type="button" value="⌵"/>	(40,000.00)
Indirect			
F & A			
Total	18,000.00	18,000.00	

*Last adjusted by: John Doe on 10/05/2012



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My List(s)



Adjust Projected

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Budget Level 3
 Project Dates 02/01/2010 - 01/08/2015

Pay-roll Expenses

Edit Projection Add Projection Show / Hide Columns

Budget Category	Employee / Vendor	Description	Date From	Date To	Projected Amount (\$)
<input type="checkbox"/> Graduate Students	Jennings-Shaffer	25% Effort	9/18/2012	12/31/2012	2,259.03
<input type="checkbox"/> Personnel-Salary	Chinn, Lisa A	15 % Effort	9/18/2012	12/31/2012	4,431.82
<input type="checkbox"/> Under Graduate Students	Frank, Alexis J	100 % Effort	9/20/2012	4/8/2015	26,498.63
Total (\$)					33,189.48

Non Pay-roll Expenses

Edit Projection Add Projection Show / Hide Columns

Budget Category	Employee / Vendor	Description	Date From	Date To	Projected Amount (\$)
<input type="checkbox"/> Graduate Students	Jennings-Shaffer	25% Effort	9/18/2012	12/31/2012	2,259.03
<input type="checkbox"/> Personnel-Salary	Chinn, Lisa A	15 % Effort	9/18/2012	12/31/2012	4,431.82
<input type="checkbox"/> Under Graduate Students	Frank, Alexis J	100 % Effort	9/20/2012	4/8/2015	26,498.63
Total (\$)					33,189.48



Thank You!