

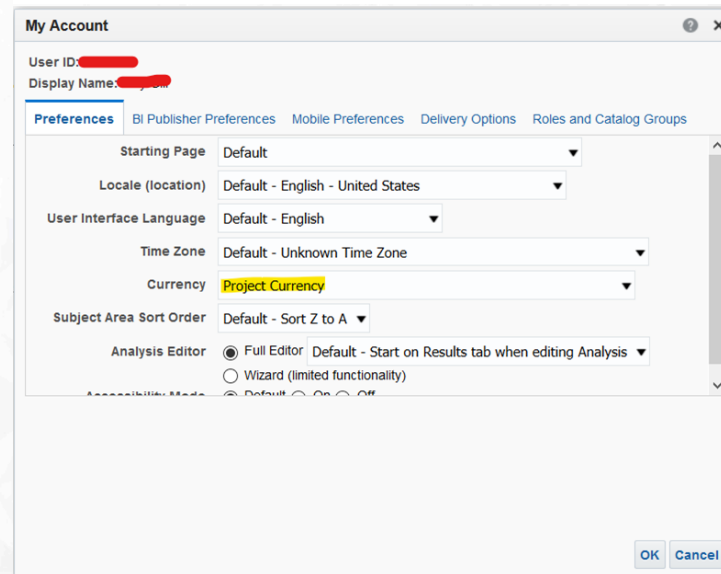
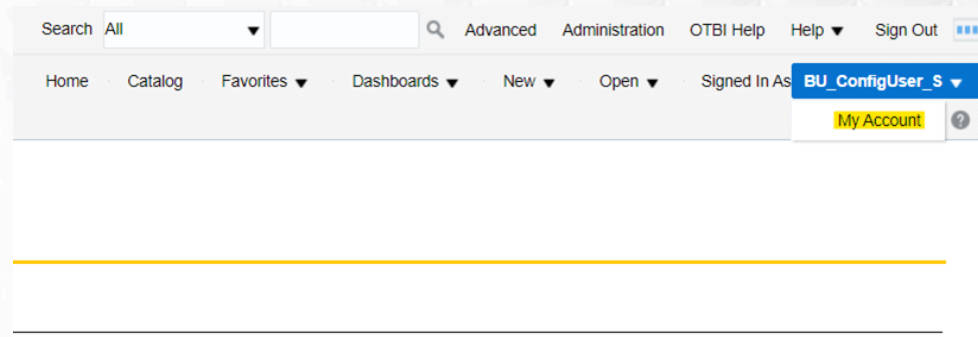
Project Management Data Portal Training



Enabling Project Currency



- In order to see budget and expense data in Ignite, you must change your Currency to 'Project Currency'
- To do this, go to the top right corner of the screen and click on 'My Account'
- Then, select 'Project Currency' from the Currency dropdown and click OK



- [illegible]

Exporting Data (Data Flavor 2)



- To export data from this type of report, navigate to the top right corner and selecting the 'View Report' button

Account Apply

- Interactive
- HTML
- PDF
- RTF
- Excel (*.xlsx)
- PowerPoint (*.pptx)

Department	Fund	Designation	Account			Project
General Institutional	Operating	Personnel Cost Distributions	PPM-Labor	Unspecified	Default	Bryan
General Institutional	Operating	Personnel Cost Distributions		Unspecified		
General Institutional	Operating	Personnel Cost Distributions		Unspecified		



QRG's



Research Budget Portfolio



Business Case

View the overall internal and external funding portfolio by Entity, Department, or PI. View budget, commitments, actuals and remaining by project or faculty fund totals. Drill into detail budget, commitments, and actuals.

Questions Answered

- What is the remaining balance for a particular award or project?
- Is my burn rate on track for the duration of my project?
- What is the remaining budget in my Faculty Funds?

Instructions/ Expectations

- Review monthly or as needed to monitor the budget to actuals for sponsored programs and faculty funds projects
- Prompt by PI to view the overall portfolio for a chosen faculty member
- Click into the hyperlinked values to view the detail levels of the budget and actuals

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

Burn Rate = % of Budget Spent/ % of "Days Spent"

100% indicates that spending is on a linear trend towards consuming total budget at the time the project ends. Calculation is as follows:

$$\frac{\text{Expenses \& Commitments}}{\text{Total Budget}} = \text{Percent of budget spent}$$

$$\frac{\text{Days since Project Start Date}}{\text{Total days in Project}} = \text{Percent of days "spent"}$$

$$\frac{\text{Percent of budget spent}}{\text{Percent of days spent}} = \text{Burn Rate \%}$$



Budget to Actuals – Sponsored Programs

Business Case

View budget, commitments, actuals and remaining by Sponsored Programs project at the lowest budgeting level. Drill into detail budget, commitments, and actuals.

Questions Answered

- What is the total budget in an expenditure category for a particular project?
- How much Salary and Wage budget do I have remaining?
- How much Internal funding is left remaining for my project?

Instructions/ Expectations

- Review as needed to monitor the budget to actuals of Sponsored Programs at a detail level.
- Prompt by PI to view data for a chosen faculty member at detail level.
- Prompt by Department to view the Faculty Funds that pertain to your area.

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

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Budget to Actuals – Faculty Funds



Business Case

View budget, commitments, actuals and remaining by Faculty Fund at the lowest budgeting level. Drill into detail budget, commitments, and actuals.

Questions Answered

- What is total budget in a task for a particular Faculty Fund?
- How much do I have remaining to spend in Startup Funds?
- How much discretionary funding is left in a particular Faculty Fund?

Instructions/ Expectations

- Review as needed to monitor the budget to actuals of Faculty Funds at a detail level.
- Prompt by PI to view data for a chosen faculty member at detail level.
- Prompt by Department to view the Faculty Funds that pertain to your area.

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

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Commitment Detail– Sponsored Programs & Faculty Funds



Business Case

View requisition and purchase order commitment details on a project or award.

Questions Answered

- What requisitions are outstanding on a particular project?
- What requisitions and purchase orders comprise the total committed on the budget to actuals reports?
- What is the description and supplier for an outstanding purchase order on my project?

Instructions/ Expectations

- Review as needed to monitor the outstanding commitments on projects

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

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Expense Summary – Sponsored Programs & Faculty Funds



Business Case

View actuals totals by Expenditure Category and Expenditure type on a project or award. Drill into line level actuals.

Questions Answered

- How much was spent on a particular Expenditure Type in a project?
- What is the spending activity in my department on active project?

Instructions/ Expectations

- Review as needed to monitor the spending on Sponsored Projects and Faculty Funds
- Click into the hyperlinked values to drill into line level expense detail

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

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Expense Line Detail – Sponsored Programs & Faculty Funds



Business Case

View expense line details on a project or award.

Questions Answered

- What transactions comprise the totals that are displayed in the budget to actuals, and expense summary reports?
- What items have been charged to my project?

Instructions/ Expectations

- Review as needed to monitor the spending on Sponsored Projects and Faculty Funds
- Use to resolve ad hoc inquiries about specific expenses

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

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Award Profile



Business Case

Quick view of Award profile including Award identification values, funded amounts, and associated projects.

Questions Answered

- What is the total Award funding on a particular Award?
- What is the burden schedule for a particular Award?
- How much internal funding does a particular award have?

Instructions/ Expectations

- Review as needed to monitor funding for awards and query for ad hoc questions.
- Prompt for a particular Award to view details.

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- Pls (projects responsible for)

Additional Notes

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Project Resources



Business Case

List of resources on a project with Project Role, Start Dates, and End Dates

Questions Answered

- Who are all the resources on my project?
- Who has an upcoming end date as a resource on my project?
- Who are all the PIs on active projects?
- What are all the project roles for a given person?

Instructions/ Expectations

- Review as needed to monitor resources and query for ad hoc questions.
- Prompt by end date to view who has an upcoming end date on a project and will need a costing update?

Location

Tools > Project Management Data Portal

Audience

- Business Officer (all data)
- URAs (all data)
- PIs (projects responsible for)

Additional Notes

- This is intended to be used by URAs with the Salary Costing and Commitment to ensure resources have appropriate costing.



Salary Costing & Commitment



Business Case

View salary costing string and percentage split by employee and assignment. View the projected salary costs to be spent before the end of the budget period.

Questions Answered

- What is the costing split for a particular employee?
- Who is costed to my Department?
- Who is costed to my Award/ Project?
- What is the projected salary costs for a particular employee this year?

Instructions/ Expectations

- Review monthly or as needed to monitor personnel costing in your area
- Prompt by Entity or Department to view the people fully or partially costed to your area
- Prompt by Person Number or Person Name to view costing for an employee
- Prompt by project end dates to ensure employees will not be costed to an inactive project – enter a date to see the Project End Dates that are to happen before that date.

Location

Tools > Financial Management Data Portal
Tools > HCM Management Data Portal
Tools > Project Management Data Portal

Audience

- Business Officers (Entity Data)
- HCM Specialists (All Data)
- URAs (Entity Data)
- Central Finance (All Data)
- Central HR (All Data)

Additional Notes

- Costing data reflects real time changes
- Projected salary costs will be the most accurate the beginning of the month after monthly Payroll has been paid for the previous month. Formula is as follows: Monthly Salary * Months left to be paid in budget period
- Employees with separation dates prior to the end of the budget period will have committed salary up to the month of separation



Salary Costing History



Business Case

View complete history of salary costing and percentage split by employee, assignment, and time period.

Questions Answered

- What is the costing split for a particular employee at a given point in times?
- Who was costed to an Award/ Project in a given month?
- What is the complete costing history snapshot for a given employee?

Instructions/ Expectations

- Prompt by Entity or Department to view the people fully or partially costed to your area
- Prompt by Person Number or Person Name to view a complete costing history for an employee
- Prompt by Award or project to view employees who were costed to an award over a given span of time

Location

Tools > Financial Management Data Portal
Tools > HCM Management Data Portal
Tools > Project Management Data Portal

Audience

- Business Officers (Entity Data)
- HCM Specialists (All Data)
- URAs (Entity Data)

- Central Finance (All Data)
- Central HR (All Data)

Additional Notes

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Additional Compensation and Benefits Costing



Business Case

View costing string and percentage split by additional pay or benefits for an employee.

Questions Answered

- What is the costing split for a faculty overload for a particular employee?
- What additional pay or benefits are costed to my Award/ Project?
- Where was an employee's benefits previously costed?

Instructions/ Expectations

- Review monthly or as needed to monitor personnel costing in your area
- Prompt by Entity or Department to view the additional compensation and benefits fully or partially costed to your area
- Prompt by Person Number or Person Name to view all costing for an employee's additional compensation and benefits
- Prompt by date to view compensation costing for a certain time period

Location

Tools > Financial Management Data Portal
Tools > HCM Management Data Portal
Tools > Project Management Data Portal

Audience

- Business Officers (Entity Data)
- HCM Specialists (All Data)
- URAs (Entity Data)
- Central Finance (All Data)
- Central HR (All Data)

Additional Notes

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PPM to GL – Revenue and Cost Reconciliation



Business Case

View various Cost and Revenue buckets of data in the PPM module.
View Revenue and Cost data by CoA as interfaced to the GL.
Drilldown to the next level of detail available in the PPM module

Questions Answered

- What are the sources of cost charged to my projects?
- Which employees have charged Travel expenses to my projects and how much?
- What is the cost breakdown to my Sponsored projects between External and Internal Funds

Instructions/ Expectations

- Review as needed to view the components of Cost charged to projects (Conversion, Banner, Cost Transfer, Oracle projects for FA rates, Payables for Vendor and employee expenses and Payroll)
- Select desired Filter for Accounting Period, Project Organization and/or Project Type
- The “Cost and Revenue Trans Source” tabs will allow drilldown to detail by clicking on amount by each project

Location	Audience
Tools > Central Finance Data Portal Tools > Financial Management Data Portal	<ul style="list-style-type: none">- Business Officers (entity data)- URA's(all data)- Central Finance (all data)

Additional Notes

-Payables Cost data found in PPM is transferred to GL by Oracles Payables, not PPM.



Appendix

