This interactive job aid helps you understand entering, changing, and effectively using projections in the Faculty Portfolio tool within MyReports.

- The Faculty Portfolio Projections tool enables users to project revenue, expenses, and other changes for sponsored projects and other faculty controlled funding for a Fund/Dept ID/Project/Activity Period. Published projections are displayed in Faculty Portfolio reports, along with general ledger data, to provide projected balances for sponsored projects and projected net positions for non-sponsored projects
- On the Projections sheet, you can enter projections for revenue, non-personnel expenses and other changes at Account Level D
- On the Budget sheet, you can enter budget projections at Account Level D
- On the Personnel Projections sheet, you can enter projections for existing employees or to be hired (TBH) employees
- Projections can be edited and saved as many times as needed without publishing projection data into the Faculty Portfolio reports
- Users can publish projections any time they are ready to "push" their projection data into the MyReports Faculty Portfolio suite, where they can review their published projections in conjunction with general ledger data in a variety of useful and informative reports
- Throughout this job aid, the term "Projection" refers to "Projection of general ledger **actuals**", in other words, the amounts that are anticipated to post to the "actuals" ledger. The term "Budget Projections" is used when referring to the "budget" ledger

Throughout this interactive job aid you will notice several icons:										
Always located on the bottom right of each page, this is the previous arrow, click it to go back one page.	Click this home icon to return to the table of contents on page 2 any time during your session from the bottom right of a page.									
Always located on the bottom right of each page, this is the forward arrow, click it to go forward one page.	In some areas, short videos demonstrating a process are available. Click the film reel icon to see them. Click the small white "x" in the upper right-hand corner of the video window to close it.									
The checkered flag icon denotes when you have reached the end of the current section	The printer icon denotes there is a specific print version of the section you are currently viewing, click it to open a PDF file more suited for printing.									



## Portfolio Projections Job Aid Home



General Portfolio Projections Navigation							
Navigating in Faculty Portfolio Projections							
Sponsored Projections	Non-Sponsored Projections						
Overview – Projecting for Sponsored Awards	Overview – Projecting for Non-Sponsored Funding						
Entering Projections for Sponsored Awards	Entering Projections for Non-Sponsored Funding						
Entering Budget Projections							
Personnel Projections							
Interactive Personnel Projections Roadmap							
Entering Personnel Projections							
Using the Insert Future PPS Payroll Feature							
Entering the % Benefit Rate	Personnel Projections topics apply to both Sponsored and Non-Sponsored Projections						
Adding Pay Elements to Existing Personnel Projections							
Using the Rent Recharge Calculation Tool							
Using the Personnel Projections by Employee Sheet							
Saving, Publishing, and Commenting	Job Aid Navigation						
Saving and Publishing Projections	Click to return to this page						
Entering Comments for a Faculty Member	Click to print this entire job aid.						
Entering Comments for a Chartstring	Consider our environment before you print						
Entering Comments for a Specific Projection Cell	You can access this job aid at any time						



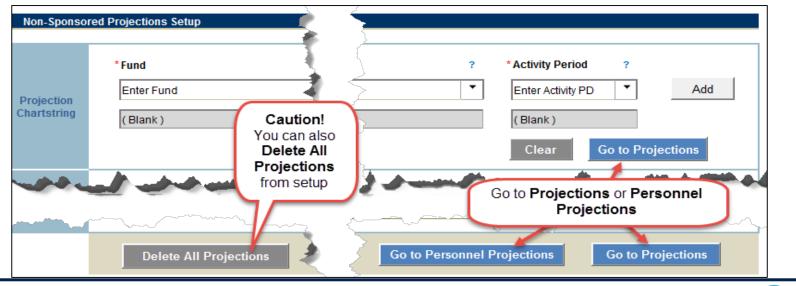
### Navigating in Faculty Portfolio Projections



- You can easily navigate to **Projections**, **Personnel Projections**, and **Budget Projections** (for **Sponsored Projects** only) from the Setup page or in the Projections view using the provided buttons or links:
- Sponsored Standard and/or Extended Projections Navigations

Standard Project	ctions Setup	
	*Fund	? *Project ? *Activity Period ?
Projection	Enter Fund	Enter Project     Enter Activity PD     Add
Chartstring	4301 - Private Contract Caution	101106A - Myotendinous Junction Formatio 03
	You can al Delete A	SO Clear Go to Projections
	Projection from setu	p Go to <b>Projections</b> , <b>Budget Projections</b> , or
	manna	Personnel Projections
	Delete All Projections	Go to Budget Projections Go to Personnel Projections Go to Projections

• Non-Sponsored Projections Navigations

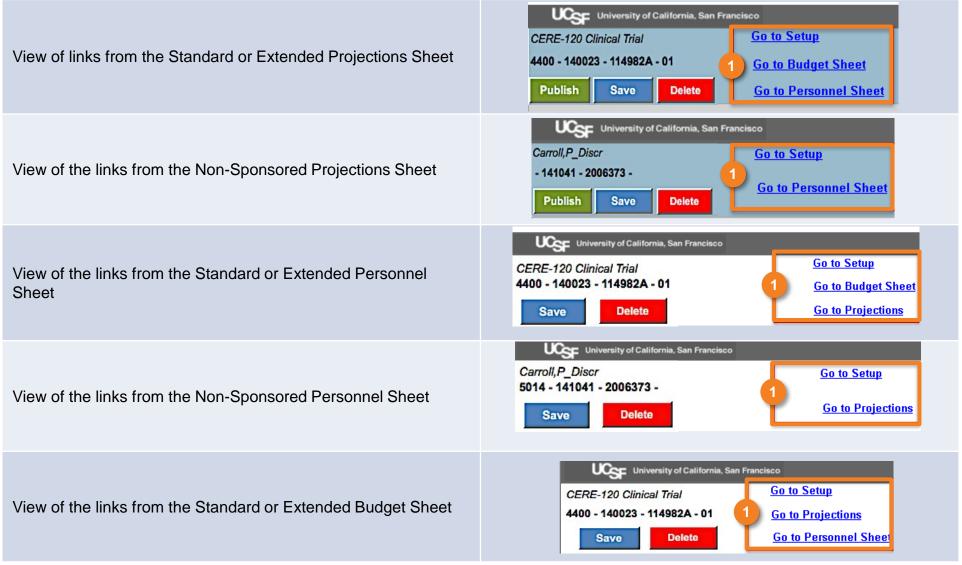


Faculty Portfolio Projections Interactive Job Aid

### Navigating in Faculty Portfolio Projections

Links are provided for quick navigation to individual projection sheets (1).

### Websheet Navigation Links





## Navigating in Faculty Portfolio Projections



- Use the Save button to save your projection data, use the Publish button when ready to push projections into MyReports, and use the Delete button to delete projections entered on the sheet
- Use the links to jump to other projection sheets (note Budget Sheet is only available in Standard and Extended Projections)
- Move the bottom scrollbar to the right to progress through months or back to the left to scroll toward the current period
- Move the right scrollbar up and down to scroll through the account rows
- 🎐 Use the buttons on individual level C accounts to expand ਜ or collapse 📄
- Use the buttons in the Account area to: Expand all accounts to Level D, Collapse them all back to Level C, or show only available projection entry rows without their Level C accounts by clicking Level D Only

University of California, San Francisco		Sponsored Proj	ections - Exter	Ided						
CERE-120 Clinical Trial Go to Setup 2	Project-Activity Period: 05/12/2010 - 07/31/2017									
4400 - 140023 - 114982A - 01 Go to Budget Sheet		Award Period: 05	5/12/2010 - 07/3	1/2017						
		Last Published to	Reports on AP	R 25 2016 11.4	6 am hviee	Peili				
Publish Save Delete Go to Personnel Sheet					o a.m. by 200, 1	0				
Account: 6	TOTAL Budget	Prior Transactions	Feb-2017	Mar-2017	Apr-2017	May-2017	May-2017			
Expand to Level D Collapse to Level C Level D Only	(Including Projections)	for Activity Period	Actual	Actual	Actual	Actual	Projections			
REVENUES:										
4500C - Sponsored project rev exc SFGH	0	0	0	0	0	0	0			
4504D - Private clinical trial revenue	0	0	0	0	0	0	0			
TOTAL REVENUES	\$ 0	\$ 0	\$ 0	\$0	\$0	\$ 0	\$0			
EXPENSES:	(									
5000C - Faculty salaries	0	177,223	0	0	0	0	0			
5010C - Faculty bonuses & incentives	0	0	0	0	0	0	0			
5010D - Faculty bonuses & incentives	0	0	0	0	0	0	0			
5020C - Non-faculty academic salaries	0	0	0	0	0	0	0			
5020D - Non-faculty academic salaries ± 5030C - Faculty benefits	0	0	0	0	0	0	0			
5040C - Non-faculty academic benefits	0	7,675	0	0	0	0	0			
	0	0	0	0	0	0	0			
E 5060C - Staff benefits	0	241,060	0	0	0	0	0			
Pay & Benefits outside of PPS	0	77,993	0	0	0	0	0			
TOTAL PERSONNEL	0	-22	0	0	0	0				
	\$ 0	\$ 503,929	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0			
<u>5550C - Services</u>	0	338	0	0	0	0	0			
<u>5578C - Travel, Mtgs &amp; Entertainment</u> <u>5578C - Scholastic fallowskie</u>	0	242,106	0	1,521	0	0	9			
<u>5579C - Scholarship/fellowship</u> <u>5579C - Scholarship/fellowship</u>	0	103,045	0	0	0	0				
	3			~	2	~				

Faculty Portfolio Projections Interactive Job Aid

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### Standard & Extended Projections Explained

#### What are Standard / Extended Faculty Portfolio Projections?

The Faculty Portfolio Projection tool enables users to project *clinical trial revenue, budget, expenses, and other changes* for **Sponsored** projects. Projections are then consolidated into reports with general ledger data to provide a projected balance.

#### What can I do with the Standard / Extended Projections tool?

- Similar to an Excel Spreadsheet, the **Projection** tool is used to project for a Fund/Dept ID/Project/Activity Period combination (Chartstring)
- Just as Excel workbooks can contain multiple sheets, there are three sheets in sponsored projects Projections: Budget, Projections and Personnel
- On the Projections and Budget sheets you can enter projections for clinical trial revenue, tuition/fees & grad student health insurance, non-personnel expenses and other changes at account level D
- On the Personnel Projections sheet, you can enter projections for any existing employees or TBH (To Be Hired) Employees
- Projections can be saved as needed for later editing, and can be published any time you want to "push" your projection data to MyReports

#### Accessing the Projection Tool

- Log into MyReports by going to MyAccess, signing in with your SFID or campus ID and Password (Scroll down to and click MyReports in the Application list)
- Click on the **Portfolio Projections** tab and then select either Standard or Extended Projections
- 1. **Standard Projections**: Provide the ability to project up to 24 months
- 2. Extended Projections: Provide the same ability for up to 60 (sixty) rolling months

	Faculty Portfolio Portfolio Projections
	Choose Standard
	Projections for up to 24
	months, or Extended
(	andard Projections Projections for up to 60
I	ables users to project up to 24 months of budget, expenses, and other change or Spo rolling months
L	blished, are consolidated into reports with the actual expenditures to provide a projected back
l	tended Projections
	me as standard projections but provides a rolling 60-month projection period.
	on-Sponsored Projections
	ables users to project up to 5 fiscal years of revenue, expenses, and other changes for Non-Sponsored projects. Projections,
	ce published, are consolidated into reports with the actual revenue, expenses, and other changes to provide a projected balance.
	rsonnel Projections by Employee
	ables users to project personnel expenses across multiple funding sources, including both Sponsored and Non-Sponsored projects,
	a single employee over a rolling 60-month period. Saved Projections are visible in the Standard, Extended, and Non-Sponsored
	ojections sheets. Projections, once published, are consolidated into reports with the actual expenditures to provide a projected balance.
	omments for Faculty
	ables users to enter or update comments that are not specific to a particular chartstring. Published comments will appear in
	MyPortfolio report found on the Faculty Portfolio tab.
	the second secon



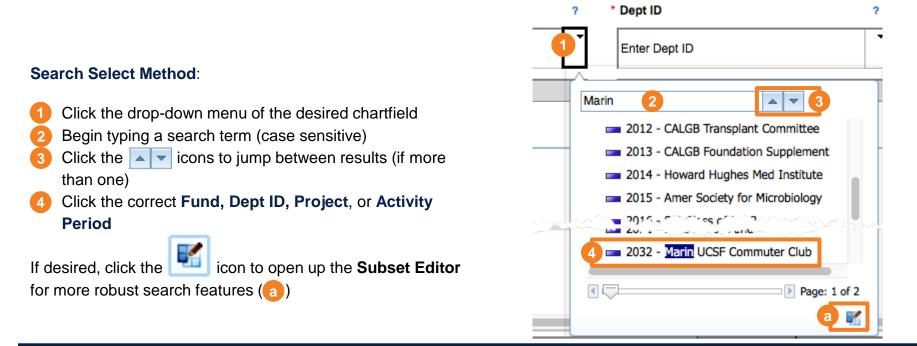


#### Entering the Chartstring for Standard & Extended Sponsored Projections

- All four fields of the Projection Chartstring (Fund, Dept ID, Project, and Activity Period) must be entered:
  - Fields may be populated by either:
    - Direct Entry: Type the exact items in each field then click the Add button
    - Search Select: Use the provided search interface to obtain the proper entries for each of the Chartstring fields required
- For the **Direct Entry** method, click inside the required field and enter the value, e.g. Fund 4000

	* Fund	? *D	)ept ID	?
Projection Chartstring	4000	<b>▼</b>	Enter Dept ID	T,
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				3

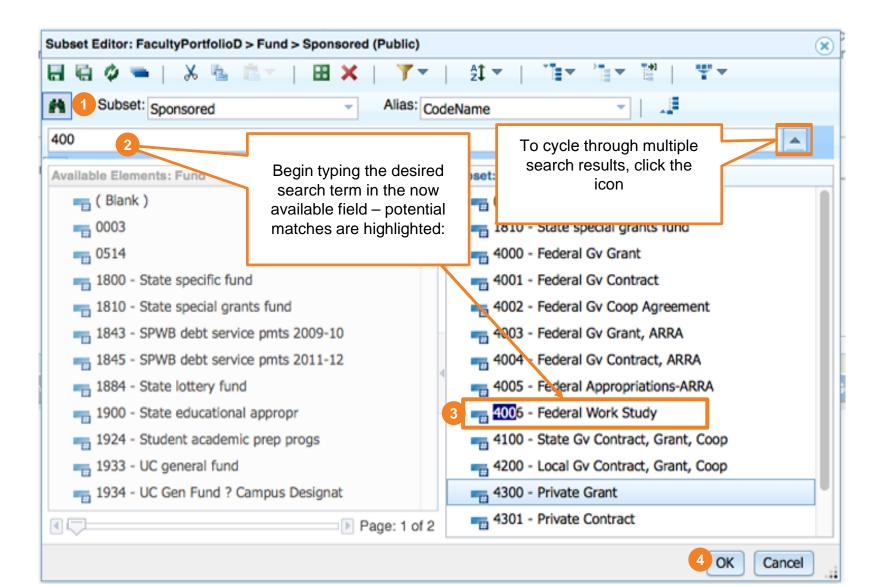
• Note the information entered is green in color, indicating it has only been entered and not yet added to the projection sheet





### Searching for and Making Selections Using the Subset Editor

- Within the Subset Editor you can use the search function by clicking the [1] (binoculars) icon, (1) which opens up the search field (2)
- Follow the detailed map below to learn how to use this feature





1п.



- 1 After entering the Projection Chartstring, click the Add button to populate the chartstring and trigger Project Chartstring validation
- 2 After clicking on the Add button, if any of the chartfield data you entered was incorrect, you will see an "Invalid Entry" message beneath the chartstring. This must be corrected or projections will be entered on the erroneous chartstring, and will not properly interface with MyReports when published. Check the fields and try again by repeating step 1 (clicking Add) to proceed.
- 3 If the Project Chartstring is valid, once the Add button is clicked (or if you selected the Award/Project using the Subset Editor), Award information displays in the **Project Info** section as illustrated. Remember to check the Project Info for accuracy and to ensure you've entered the correct chartstring before proceeding to enter projections.
- Enter Comments to be published to the MyPortfolio and Program Portfolio reports in this box, and click Save to add them to the chartstring. Comments are not pushed to reports until your projections are published. You can also enter comments using the box provided at the bottom of all projection sheets (see "Entering Comments on Projection Sheets").

Standard Projections Setup

- 5 To go straight to the Projection sheet, click the **Go to Projections** button
- 6 To go straight to the Budget Projection Sheet, click the **Go to Budget Projections** button
- 7 To go straight to Personnel Projections sheet, click the Go to Personnel Projections button

Projection Chartstring	* Fund If a value you entered was invalid, you'll see this message after you click Add	* Dept ID 333023 333023 - P_Pharm Chem General	<ul> <li>* Project</li> <li>110600A</li> <li>110600A - Molecular Epidemiology of Pance</li> <li>After entering in the</li> <li>Projection Chartstring,</li> </ul>	<ul> <li>Activity Period</li> <li>Q3</li> <li>Add</li> <li>Q3</li> <li>Clear</li> <li>Go to Projections</li> </ul>
Project Info	Award PI: HOLLY,EL Project PI: HOLLY,EL Project Lab Owner: Project Use: Sponsore	Epidemiology of Pancreatic Cancer IZABETH A IZABETH A d Project xas M.D. Anderson Cancer Ctr	Click Add Award/Parent ID: Project-Activity Perio Award Period:	A110600 od: 05/01/2008 - 04/30/2009
Optional Entry	Enter Comments for Reports (Optional): Caution! This button deletes all previously entered projections for the entered chartstring! Save	click Save. T MyPortfoli	ents in this space and then These will be pushed to the o and Program Portfolio rts once published. 7 Go to Budget Projections Go to Per	6 5 sonnel Projections Go to Projections



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The Standard Projections Sheet displays columns/rows for:

- **U** Total Budget (Including Projections) data from the budget ledger aggregated with any entered budget projections
- Prior Transactions for Activity Period displays actual GL balances prior to the first displayed Actual month and is followed by Actual columns for all closed months leading up to the current month
- Current Month display is made up of three columns consisting of the current Actuals, a column for current month Projections, and a third column for the current month Adjusted Projection. The current month Adjusted Projection is a calculation of original projections less Actuals that have been posted to the ledger. This column is used in the Projections calculation.
- 4 Available Projection Months continue scrolling right for all available projection month columns
- Projected Adjustments this column is used to project expected adjustments, usually credits (entered as a negative number, e.g. -2095) although positive numbers may be entered as well. Amounts in this column must be manually deleted by users when appropriate.
- Liens displays lien information that includes projected F&A where applicable
- **7** Total (Including Projections) row totals across all revenues, expenses, other changes, and liens
- Balance (excluding and including budget projections) the total balance either excluding or including entries from the budget projection sheet
- **Total Direct row** sum of direct expenses plus other changes (does not calculate clinical trial revenue)
- <sup>10</sup> Total Indirect row a sum of system calculated F&A using the base code and rate, plus the Projected F&A Adjustment row

UCr	Sponse	ored Projections	s - Standard													
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Publi Sheet				2	<u></u>		3		4 —			5	6	7	(8	
Account Expape D Only	TOTAL Budget (Including Projections)	Prior Transactions for Activity Period	Jul-2014 Actual	Aug-201 Actui	-2015 ctual	May-2015 Actual	May-2015 Projections	May-2015 Adjusted Projection	Jun-2015 Projections		Jun-2016 rojections	Projected Adjustments	Liens	TOTAL (Including Projections)	Balance (excluding budget projections)	Balance (including budget projections)
REVENUE										1						
TOTAL DIRECT	9			•		0	0	0	) 0		0 0	0	0	0	0	0
5202D - Sponsored	proj - F&A rr	ecovery			2	0	0	0	0			0	0	0	0	0
	Projected F&A Adjustment															
TOTAL INDIRECT 10																
CDAND TOTAL				hand												

July 2017



In addition to doing so on the setup page, users can enter comments for the specific chartstring they are projecting for on any of the available projection sheets.

- From within any projection websheet, scroll all the way down to the bottom of the screen
- 2 Enter desired comments in the Comments box as illustrated. As with any data entered, comments are green, indicating they are not yet saved.
- 3 Select the Save button in order to save comments and updates to the projection sheet.
- 4 Click Publish to push projection and comment data to MyReports

	Ś
University of California, San Francisco Vaccines that Replicate the Ne Go to Setup 4301 - 333023 - 120483A - 03 Go to Budget Sheet 4 Publish Save Delete Go to Personnel Sheet unt:	1 Se 22015
Delete Projections Comments: Enter desired comments here, then Save this projection sheet to capture the comments.	- Orocy





#### Tips & Tricks

- The only difference between Standard Projections and Extended Projections is that Standard Projections can contain up to 24 months of projections while Extended can contain a 60 month rolling projection. Both Standard and Extended Projections are for Sponsored Funds only (400C, 1810, and 4900).
- The **Personnel Projections by Employee** sheet allows you to enter projection data for all of an employee's related chartstrings in one sheet. This includes both **Sponsored** and **Non-Sponsored** fund chartstrings. Once saved, any entered projections display on all other related projection sheets (Sponsored, Non-Sponsored and Extended). Be sure to double-check chartstrings before saving to ensure you are not unintentionally overwriting data for **Non-Sponsored** funds the employee may be associated with.
- The Portfolio Projections tab is only available to users with the **Projections** role If you find you do not have access, please contact your department's Access Administrator
- Projections can only be entered for one single Project Chartstring at a time
- Portfolio Projections work very closely with the Faculty Portfolio report suite, and when published, display in Faculty Portfolio reports
- Anyone with access to enter projections has the ability to project for any chartstring
- Information contained in Portfolio Projections is updated nightly to provide the most recent financial data possible
- Actuals are updated nightly from the General Ledger and overwrite Projections when months close
- UPIan aggregates Faculty Portfolio projections by Project Use
- In Personnel Projections, you can project personnel expenses for up to 20 "To Be Hired (**TBH**)" employees
- You can also add any current UCSF employee as projected personnel on the Personnel Sheet
- There is no system generated calculation for projected GAEL or Data Network Recharge
- Faculty Portfolio uses the project's base code to determine where indirect costs (also known as overhead, or F&A) should be assessed. However, adjustments, if necessary, can be made on the Projected F&A Adjustment row at the bottom of the Projections sheet.



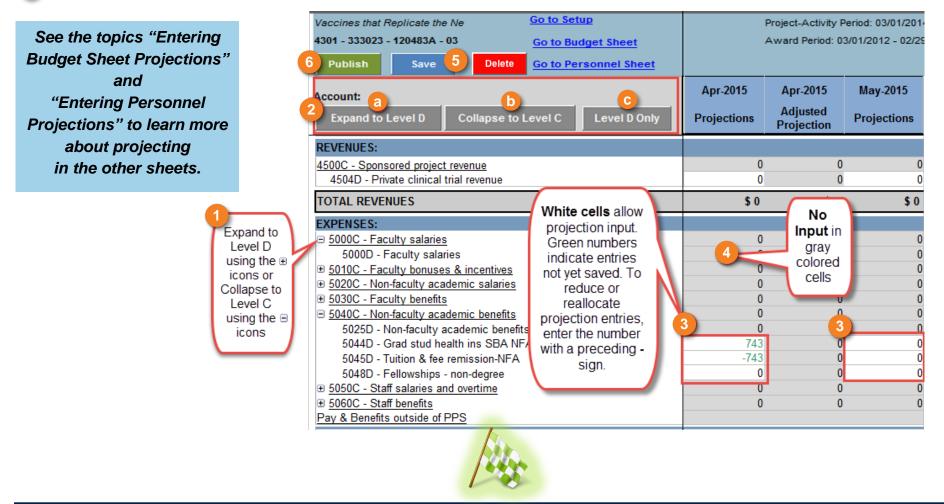




## **Entering Projections for Sponsored Awards**



- Use the 
   icons to expand to Level D, or collapse back to Level C with the 
   icons
- 2 Use the buttons in the account header to (a), Expand all accounts to Level D (b), Collapse all accounts to Level C or (c), show Level D Only
- In the Projections, Budget, and Personnel sheets, white-colored cells indicate that you can enter projection data.
- Gray-colored cells indicate that they are read-only and no data can be entered.
- 5 Enter data, as required, into the projection sheet. Remember that all unsaved data is green until you click the Save button to save the projection sheet.
- Opublish entered projections to MyReports, click the green Publish button (only available from the Projection sheet)





Budget projections are entered using a separate sheet, and are only available for Sponsored Awards.

#### Project for Budgeted Revenue, Expenses and Other Changes at Account Level D such as:

- Clinical Trial Revenue (used solely to generate F&A recovery projections; projected Clinical Trial Revenue amounts are not used in any other calculations)
- Salaries & Benefits, Faculty Bonuses and Incentives, Tuition, Fees, and Fellowships
- Rent Recharge
- Subawards
- Capital Equipment
- Utilities

### Accessing the Budget Projections Sheet

After entering the chartstring on the setup page, access the Budget Projection sheet by either of these methods:

- 1 Click the Go to Budget Projections button from the setup screen
- 2 Click the **Go to Budget Sheet** link from either the Personnel or Projection Sheets







The Budget Projections Sheet displays columns/rows for:

- Prior Budget Transactions for Activity Period displays any budget activity prior to the first displayed actual month followed by GL Budget columns for all closed months leading up to the current month
- Current Month display is made up of three columns consisting of the current Budget, a column for current month Budget Projections, and a third column displaying the Adjusted Budget Projection. The current month Adjusted Projection is a calculation of original projections less Budgets that have been posted to the ledger. This column is used in the Projections calculation.
- **Budget Projection** columns enter Budget Projections in these columns up to 24 months in standard or 60 rolling months in extended projections
- Projected Budget Adjustments enter budget adjustments in this column if necessary whether credit or debit entries. Amounts in this column must be manually deleted by users when appropriate.
- 5 **TOTAL (Including Projections)** displays all GL Budget entries aggregated with your projection entries
- **O Total Direct row** sum of direct expenses and other changes (does not calculate clinical trial revenue)
- Projected Indirect Cost Budget is entered directly (not calculated) in the Sponsored proj F&A recovery row

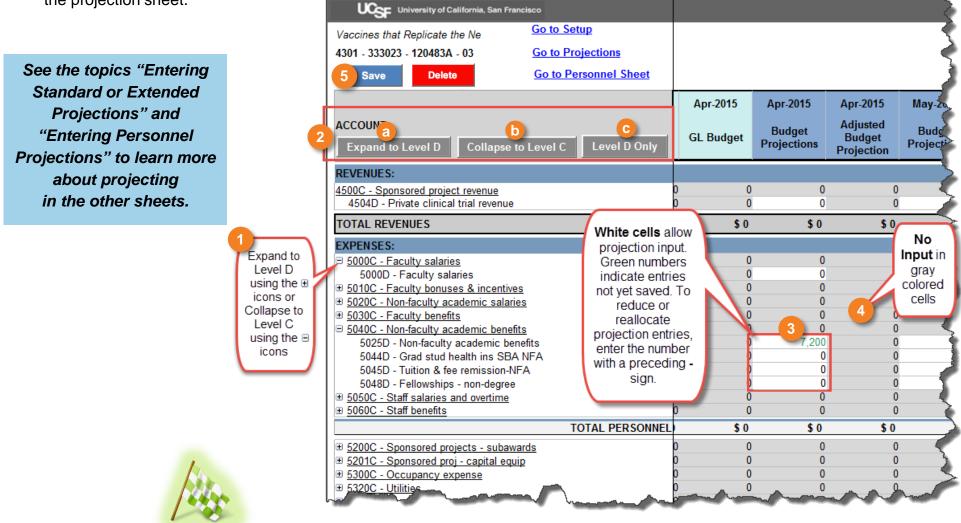
😔   🗸   🖻 🛍		🛛 🐼 🖾 📔	<b>×</b>									
UCSF Spons	ored Projections -	Budget							-			
Vaccines the Project 4301 - 33302 Award	Activity Period:	03/01/2014 - 02 03/01/2012 - 02		<u>}</u>					5			
	enou.	03/01/2012 - 02	LIZ JIZU	5		2		3 —		$\rightarrow$	4	5
Prior Buc Transact		Aug-2014	Sep	2015	May-2015	May-2015	May-2015	Jun-2015	Jul-20	Jun-20	Projected	TOTAL
ACCOUNT for Active Period	ity GL Budget	GL Budget	GL B	dget	GL Budget	Budget Projections	Adjusted Budget Projection	Budget Projections	Budger Projecti	Budge Projectio		(Including s Projections)
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## **Entering Budget Projections**



- ) Use the  $oldsymbol{\mathbb{H}}$  icons to expand to Level D, or collapse back to Level C with the  $oldsymbol{\mathbb{H}}$  icons
- 2 Use the buttons in the account header to a, Expand all accounts to Level D b, Collapse all accounts to Level C or c, show Level D Only
- 3 In the Projections, Budget and Personnel sheets, white-colored cells indicate that you can enter projection data
- 4. Gray-colored cells indicate that they are read-only and no data can be entered
- 5 Enter data, as required, into the projection sheet. Remember that all unsaved data is green until you click the Save button to save the projection sheet.







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#### Non-Sponsored Projections Explained

#### What are Non-Sponsored Faculty Portfolio Projections?

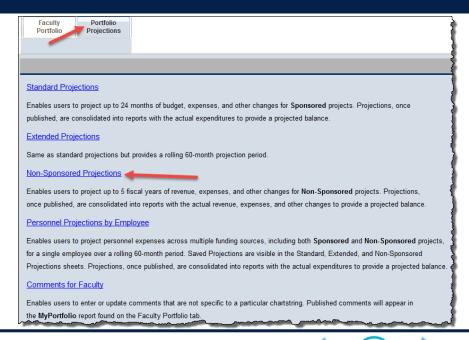
The Faculty Portfolio Projection tool enables users to project *revenue*, *expenses*, *and other changes* for **Non-Sponsored** projects for up to **5 fiscal years (60 months)**. At the end of a given fiscal year, it will be dropped from the projection sheet and the next available year added to the end of the projection range. Projections, once published, are then consolidated into reports with the actual general ledger data to provide a projected ending net position.

#### What can I do with the Non-Sponsored Projections tool?

- There are two sheets in the tool: Projections and Personnel
- Similar to an Excel Spreadsheet, the **Projection** tool is used to project revenue, expenses, and other changes for a Fund/Dept ID/Project combination (Chartstring)
- On the **Projections** sheet you can enter projections for revenue, tuition/fees & grad student health insurance, non-personnel expenses and other changes at account level D
- On the Personnel Projections sheet, you can enter projections for existing employees or TBH (To Be Hired) Employees
- The projection can be saved as needed for later editing, and can be **published** any time you want to "push" your projection data to MyReports

### Accessing the Non-Sponsored Projection Tool

- Log into MyReports by going to MyAccess, signing in with your SFID or Campus ID and Password (Scroll down to and click MyReports in the Application list)
- Click on the Portfolio Projections tab and then select Non-Sponsored Projections



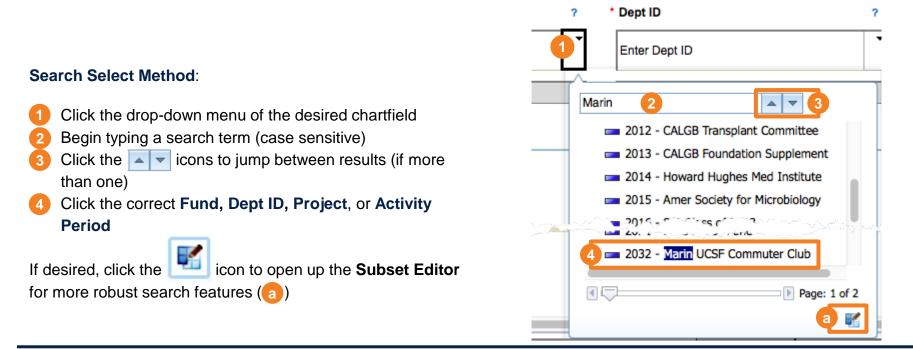


### Entering the Chartstring for Non-Sponsored Projections

- Three of four fields of the Projection Chartstring (Fund, Dept ID, and Project) must be entered, Activity Period is optional:
  - Fields may be populated by either:
    - **Direct Entry:** Type the exact items in each field
    - Search Select: Use the provided search interface to obtain the proper entries for each of the Chartstring fields required
- For the **Direct Entry** method, click inside the required field and enter the value, e.g. Fund 7000

	* Fund	?	* Dept ID	?	
Projection Chartstring	7000	•	Enter Dept ID		
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• Note the information entered is green in color, indicating it has only been entered and not yet added to the projection sheet

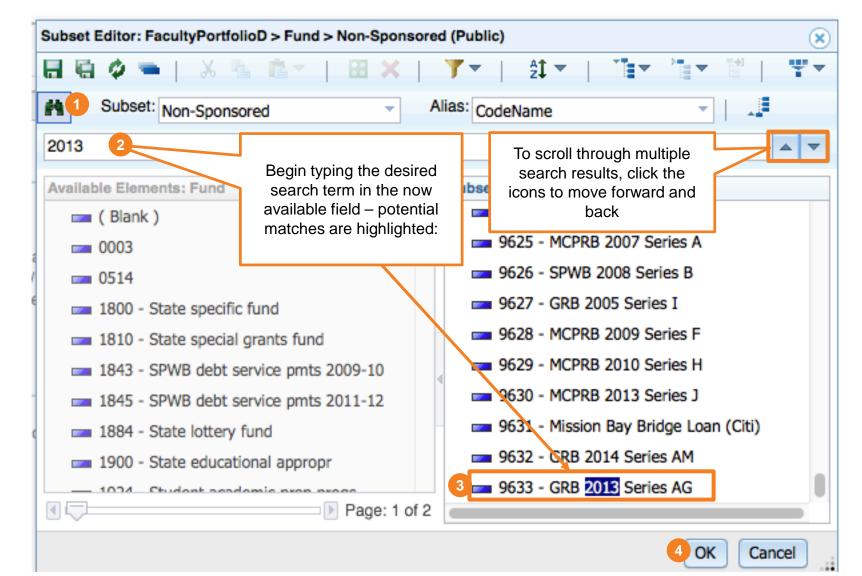






### Searching for and Making Selections Using the Subset Editor

- Within the Subset Editor you can use the search function by clicking the 📩 (binoculars) icon, (1) which opens up the search field (2)
- Follow the detailed map below to learn how to use this powerful feature
- Click the film icon in the lower left-hand corner to see a short video demo



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- 1. After entering the complete chartstring, click the Add button to run Project Chartstring validation
- 2 After clicking on the Add button, if any of the chartfield data you entered was incorrect, you will see an "Invalid Entry" message beneath the chartstring. This must be corrected or Projections cannot be performed. Check the fields and try again by repeating step 1 (clicking Add) to proceed if you receive this error.
- If the Project Chartstring is valid, once the Add button is clicked, Award information displays in the Project Info section as illustrated. Remember to check the Project Info for accuracy and to ensure you've entered the correct chartstring before proceeding to enter projections.
- 4 Enter Comments to be published to MyReports in this box, and click Save to add them to the chartstring. Comments are not pushed to reports until your projections are published. You can also enter comments using the box provided at the bottom of all projection sheets (see "Entering Comments on Projection Sheets").
- 5) To go straight to the Projection sheet, click the **Go to Projections** button
- 6) To go straight to Personnel Projections sheet, click the Go to Personnel Projections button

		Non-Spons	ored Projections Setup		
Projection Chartstring	*Fund Enter Fund Invalid Entry. 2 Invalid Entry.	* Dept ID Enter Dept ID 139407 - M_Ortho-Spine-Core	<ul> <li>Project</li> <li>Enter Project</li> <li>7001331 - Burch,S_Nuvasive</li> <li>With all Projection Charts entered and valid, click the</li> </ul>	string criteria	
Project Info	Project Title: Burch,S_N Parent Project Manager: BURCH,SH Project Manager/Owner: BURCH,SH Project Lab Owner:		Parent Projec		stment
Optional Entry	Enter Comments for Reports (Optional): Caution! This button will remove all previously entered projections!  Delete All Projections		Enter comments here that will be pushed to MyReports when you publish your projections then click <b>Save</b>	6 Go to Personnel Projections	5 Go to Projections



21

The Non-Sponsored Projections Sheet displays columns/rows for:

- U Actuals data from the GL is displayed up to the current month
- Current Month Display displays any current month GL activity, followed by a Projection column and Adjusted Projection column for the current month. The current month Adjusted Projection is a calculation of original projections less Actuals that have been posted to the ledger. This column is used in the Projections calculation.
- Projections display for 5 fiscal years beginning with the current year, keep scrolling right to enter projection data as far as necessary
- Projected Adjustments this column is used to project expected adjustments, usually credits (entered as a negative number, e.g. -2095) although positive numbers may be entered as well. Amounts in this column must be manually deleted by users when appropriate.
- Liens displays lien information that includes projected F&A where applicable
- <sup>6</sup> Total (Including Projections) row totals across all revenue, expenses, other changes, projections, and liens

Change in Net Position – this is a calculated amount (revenue-expenses+other changes) by month

- 3 Net Position Beginning of Period this displays the Net Position as of the beginning of that month
- 9 Net Position End of Period this is a calculated amount (Beginning Net Position + Change in Net Position)

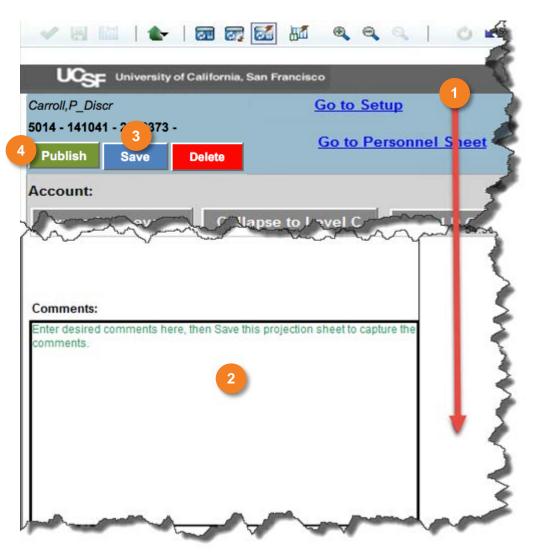
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In addition to doing so on the setup page, users can enter comments for the specific chartstring they are projecting for on any of the available projection sheets.

- From within any projection websheet, scroll all the way down to the bottom of the screen
- 2 Enter desired comments in the Comments box as illustrated. As with any data entered, comments are green, indicating they are not yet saved.
- Select the Save button in order to save comments and updates to the projection sheet
- 4 Click Publish to push projection and comment data to MyReports







#### Tips & Tricks

- Use the Non-Sponsored Projections sheet for all Non-Sponsored Funds
- Use for projects with Faculty/PI/Owner activities, Recruitment faculty startup, and Retention project uses
- You can project for up to 5 fiscal years
- Do not use with the general unspecific project 1111111
- The Portfolio Projections tab is only available to users with the Projections role
- Projections can only be created for one single Project Chartstring at a time
- Portfolio Projections work very closely with the Faculty Portfolio report suite, and when published, display in Faculty Portfolio reports
- Anyone with access to enter projections has the ability to project for any chartstring
- GL information (Actuals) contained in **Portfolio Projections** is updated nightly to provide the most recent financial data possible and overwrites Projections over time
- UPIan aggregates Faculty Portfolio projections by Project Use
- In Personnel Projections, you can project personnel expenses for up to 20 "To Be Hired (TBH)" employees or any current UCSF employee
- There is no system generated calculation for projected GAEL or Data Network Recharge
- The Personnel Projections by Employee sheet allows you to enter projection data for all of an employee's related chartstrings in one sheet. This includes both Sponsored and Non-Sponsored fund chartstrings. Once saved, any entered projections display on all other related projection sheets (Sponsored, Non-Sponsored and Extended). Be sure to double-check chartstrings before saving to ensure you are not unintentionally overwriting data for Sponsored funds the employee may be associated with.

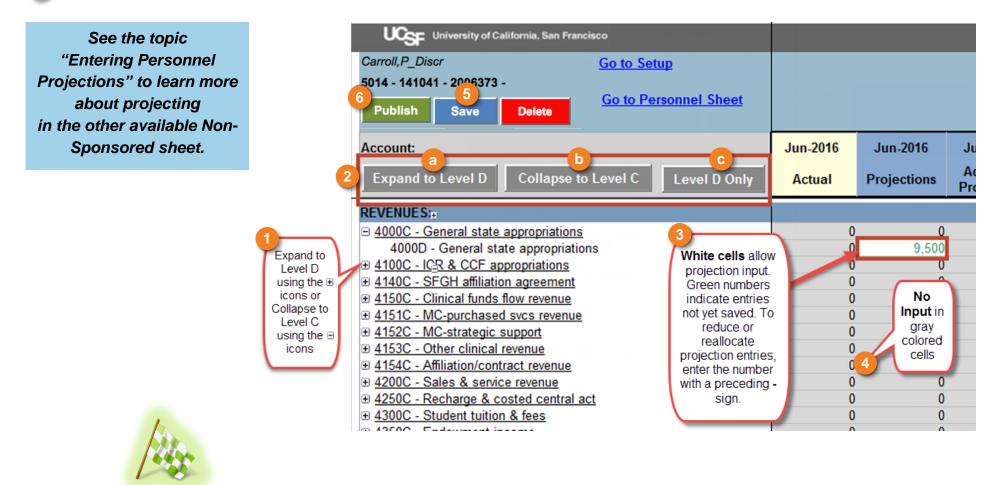




## **Entering Projections for Non-Sponsored Funding**



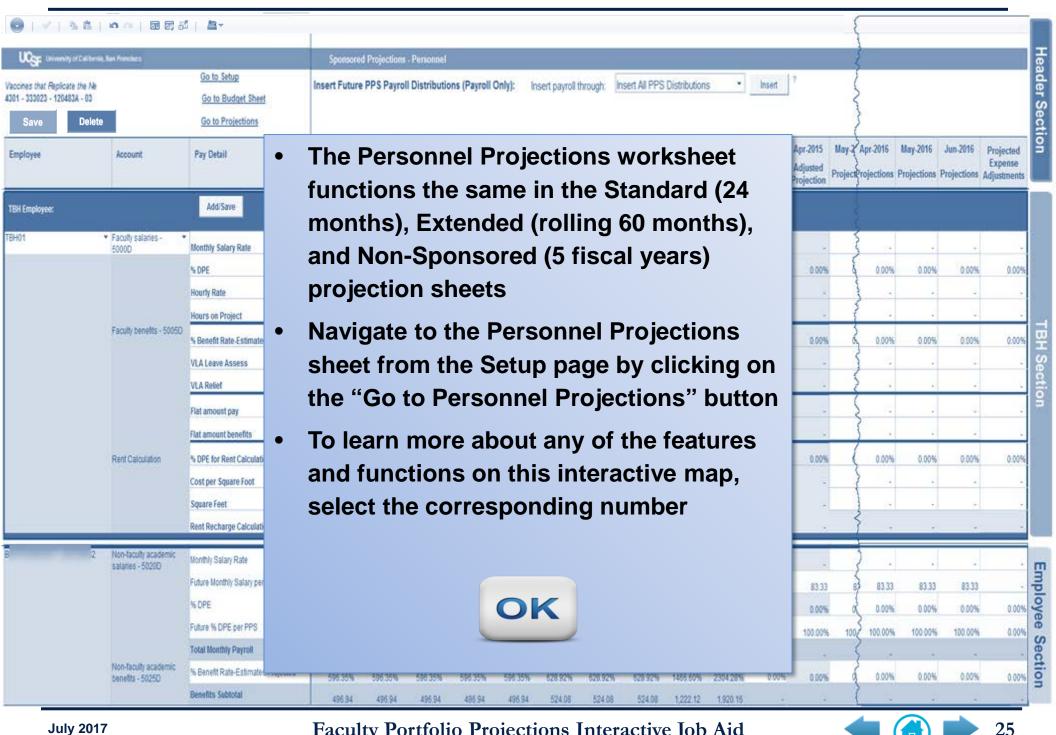
- 2 Use the buttons in the account header to (a), Expand all accounts to Level D (b), Collapse all accounts to Level C or (c), show Level D Only
- In the Projections and Personnel sheets, white-colored cells indicate that you can enter projection data
- Gray-colored cells indicate that they are read-only and no data can be entered
- 5 Enter data, as required, into the projection sheet. Remember that all unsaved data is green until you click the Save button to save the projection sheet.
- Openation of the projection of the projection of the provide the green Publish button (only available from the Projection sheet)







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Faculty Portfolio Projections Interactive Job Aid



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8 2	Non-faculty academic salaries - 5020D	Monthly Salary Rate	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33				ζ.				т
		Future Monthly Salary per PPS											83.33	83.33	8	83.33	83.33	83.33		du
		% DPE	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	ď	0.00%	0.00%	0.00%	0.00%	Employe
		Future % DPE per PPS	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100.00%	100,	\$ 100.00%	100.00%	100.00%	0.00%	e S
		Total Monthly Payroll	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33			4	{ .				
	Non-faculty academic benefits - 5025D	% Benefit Rate-Estimated Projected	596.35%	596.35%	596.35%	596.35%	596.35%	628.92%	628.92%	628.92%	1455.50%	2304.28%	0.00%	0.00%	á	0.00%	0.00%	0.00%	0.00%	ection
		Benefits Subtotal	496.94	496.94	495.94	495.94	496.94	524.08	524.08	524.08	1,222.12	1,920.16								

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	Rent Calculation	% DPE for Rent Calculation	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6	0.00%	0.00%	0.00%	6 0.00%	
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	Non-faculty academic	% Benefit Rate-Estimated Projected	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33				}				ection
	benefits - 5025D	Benefits Subtotal	596.35%	596.35%	596.35%	596.35%	595.35%	628.92%	628.92%	628.92%	1455.50%		0.00%	0.00%	0	0.00%	0.00%	0.00%	6 0.00%	S
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		Total Monthly Payroll	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33			4	ζ.				
	Non-faculty academic benefits - 5025D	% Benefit Rate-Estimated Projected	596.35%	596.35%	596.35%	596.35%	596.35%	628.92%	628.92%	628.92%	1455.60%	2304.28%	0.00%	0.00%	4	0.00%	0.00%	0.00%	0.00%	ection
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B 2	Non-faculty academic salaries - 5020D	Monthly Salary Rate	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33				}.			
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	Non-faculty academic benefits - 5025D	% Benefit Rate-Estimated Projected	596.35%	596.35%	596.35%	596.35%	6 595.35%	628.92%	628.92%	628.92%	1455.50%	2304.28%	0.00%	0.00%	6	0.00%	0.00%	0.00%	0.00%
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8 2	Non-faculty academic	Monthly Salary Rate											_		=;	1				
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		% DPE	•	•	•	•		•	•	•	•	·	83.33	83.33	{	83.33	83.33	83.33		plo
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	Non-faculty academic benefits - 5025D	% Benefit Rate-Estimated Projected	595.35%	596.35%	596.35%	596.35%	596.35%	628.92%	628.92%	628.92%			0.00%	0.00%	6	0.00%	0.00%	0.00%	0.00%	ection
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		Future Monthly Salary per PPS											83.33	83.33	4	83.33	83.33	83.33		Employee
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	Non-faculty academic benefits - 5025D	% Benefit Rate-Estimated Projected	595.35%	596.35%	596.35%	596.35%	596.35%	628.92%	628.92%	628.92%	1455.50%	2304.28%	0.00%	0.00%	á	0.00%	0.00%	0.00%	0.00%	ection
		Benefits Subtotal	496.94	496.94	495.94	495.94	496.94	524.08	524.08	524.08	1,222.12	1,920.16				( .				

July 2017

Faculty Portfolio Projections Interactive Job Aid



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	Non-faculty academic	% Benefit Rate-EstimatedProjected	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	0.00%	-	A		0.00%	0.009		ection
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B 2	Non-faculty academic salaries - 5020D	Monthly Salary Rate 22	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33				2.				ш
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		% DPE	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	ά σ	0.00%	0.00%	0.00%	0.00%	lovee
		Future % DPE per PPS	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100.00%	100	100.00%	100.00%	100.00%	0.00%	6
	Man for the seadersis	Total Monthly Payroll	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33			(					ect
	penents - 50250	% Benefit Rate-Estimated Projected	596.35%	596.35%	596.35%	596.35%	596.35%	628.92%	628.92%	628.92%	1466.60%	2304.28%	0.00%	0.00%	ą	0.00%	0.00%	0.00%	0.00%	ection
		Benefits Subtotal	496.94	496.94	495.94	495.94	496.94	524.08	524.08	524.08	1,222,12	1,920.16			(					

July 2017

### Faculty Portfolio Projections Interactive Job Aid



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4301 - 333023 - 120483A - 03	_	Go to Budget Sheet													<	(				r Se
Save Delete		Go to Projections													(	\$				Sectio
Employee	Account	Pay Detail	Jul-2014	Aug-2014	Sep-2014	Oct-2014	Nov-2014	Dec-2014	Jan-2015	Feb-2015	Mar-2015	Apr-2015		Apr-2015	May-2	Apr-2016	May-2016	Jun-2016	Projected	B
			Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Projections	Adjusted Projection	Project	rojections	Projections	Projections	Expense Adjustments	
TBH Employee:		Add/Save	Enter Name fo	r TBH:																
TBH01 -	Faculty salaries - • 5000D	Monthly Salary Rate																-		
		N DPE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4	0.00%	0.00%	0.00%	0.00%	
		Hourty Rate														} .		-		
		Hours on Project													4	, .	· .			_
	Faculty benefits - 5005D	% Benefit Rate-Estimated Projected	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2	0.00%	0.00%	0.00%	0.00%	TBH
		VLA Leave Assess						-								<u></u> .		-		Se
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		Flat amount pay														ξ.		-		E
		Flat amount benefits														{.				
	Rent Calculation	% DPE for Rent Calculation	Total	Rows	•					0%	0.00%	0.00%	0.00%	0.00%	_ (	0.00%	0.00%	0.00%	0.00%	
		Cost per Square Foot	Total		•					X)		•				<u>}</u> .				
		Square Feet	The b	olue ro	ws ind	licate t	he <b>To</b> f	tal Mo	nthly	÷		-						-		
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B 2	Non-faculty academic	Monthly Salary Rate		oyee. I						io 📘						)				
	salaries - 50200	Future Monthly Salary per PPS		subto						33	83.33	83.33								Employee
		% DPE	amou	unt dis	olays i	n the F	Project	ion Sh	neet ar	nd in			83.33	83.33		5 83.33 0.00%	83.33	83.33	0.00%	
		Future % DPE per PPS		ts onc							100.00%	0.00%	0.00%	0.00%		2				
		Total Monthly Payroll	83.33	83.33	83.33	83.33	83.33	83.33	83.33	83.33	0.00% 83.33	83.33	100.00%	100.00%	100	(	100.00%	100.00%	0.00%	See
	Non-faculty academic benefits - 5025D	% Benefit Rate-EstimatedP 23	595.35%			596.35%					1466.60%		0.00%	0.00%	á	0.00%	0.00%		0.00%	Section
		Benefits Subtotal	496.94	496.94	496.94	496.94	496.94	524.08	524.08		1,222.12		0.00%	0.00%		0.00%	0.003	v.vv7	0.00%	ž
			450.34	450.54	450.54	450.54	450.54	024.00	064.00	024.00	1,666.16	1,020.10								

July 2017



### **Entering Personnel Projections**

Project for employees or up to 20 To-Be-Hired (TBH) employees using the Personnel Sheet in any of the projection tools.

#### Choose from four accounts at Level D:

- Faculty Salaries 5000D
- Faculty bonuses & incentives 5010D
- Non-faculty academic salaries 5020D
- Staff salaries and overtime 5050D

#### Project for the following pay elements within those accounts:

- Monthly Salary Rate
- % DPE
- Hourly Rate with number of Hours on Project
- % Benefits Rate-Estimated/Projected
- VLA Leave Assessment
- VLA Relief
- Flat amount pay
- Flat amount benefits

A Rent Calculation feature is also available for each employee. Enter the % DPE for Rent Calculation, Cost per Square Foot, and number of Square Feet and the system will calculate the Rent Recharge Calculation upon saving the projection sheet.

This sheet functions the same in Standard, Extended, or Non-Sponsored projections sheets. To enter personnel projections for a *single employee across multiple chartstrings*, use the **Personnel Projections by Employee** sheet instead. To access the personnel projections sheet:

- From the setup screen, click the "Go to Personnel Projections" button, or
- 2 Use the blue hyperlink "Go to Personnel Sheet" in the header of any other projection sheet



Go to Personnel Projections



### **Entering Personnel Projections**

The steps for entering data in the Personnel sheet are similar to other projections sheets, with some additional features. You have the ability to project for **all** current UCSF, as well as up to 20 To-Be-Hired (**TBH**) employees using this tool. Once the employee or TBH is added, you can continue to project for them through the life of the project. To add a new **TBH** or existing employee to your projection:

### Entering a TBH, or To-Be-Hired employee

- Click the TBH Employee drop-down menu and select a TBH or an employee
- 2 Choose the appropriate level D Payroll account using the account drop-down menu
- Enter a friendly name (optional) for the TBH/Employee in the Enter Name for TBH field. In addition to displaying on this projection sheet, this label also displays in MyReports.
- Enter projections in available white cells to add pay elements to the selected employee or TBH
- 5 Use the Rent Calculation area if the award sponsor requires you use a Rent Recharge Calculation (see the "Entering Rent Recharge Calculation" section for more information)
- 6 After entering required projections, click the Add/Save button. This places the TBH or employee onto the projection sheet with the entered elements and amounts
- Use these links to jump to other projection sheets.
- Click Save to save your personnel projections. Remember your projections are not visible in MyReports until published.

accines that Replicate the Ne 301 - 303 - 120483A - 03 Save Delete		Go to Setup Go to Budget Sheet Go to Projections				
Employee	Account	Pay Detail	May-2015 Projections	Jun-2015 Projections	Jul-2015 Projections	Aug-2015 Projection
IBH Employee:	Paculty salaries -	Add/Save 6	Enter Name for TB	3H:	3	
	5000D	Monthly Salary Rate		-	'	<u> </u>
		► % DPE	0.00%	0.00%	0.00%	0.00
Enter any		Hourly Rate		4 -		<u> </u>
percentages required using		Hours on Project		<b>.</b>	<u> </u>	
decimals, e.g.	Faculty benefits - 5005D	D % Benefit Rate-Estimated/Projected	0.00%	0.00%	0.00%	0.00
.20 for 20%		VLA Leave Assess	-	-	_	
$\square$		VLA Relief	-	_	_	
		Flat amount pay	-	-	_	
		Flat amount benefits	-			
	Rent Calculation	% DPE for Rent Calculation	0.00%	0.00%	0.00%	0.0
		Cost per Square Foot	-	-	-	
	5	Square Feet	-	-	-	
		Rent Recharge Calculation	-		-	



# Using the Insert Future PPS Payroll Feature



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Future distributions from the PPS Payroll system can be populated into your available projection rows for employees using the Insert PPS Distributions interface in the header of the Personnel sheet. This feature was designed for use when establishing projections for the first time for a specific chartstring. **Use caution** when using this feature! Clicking on the Insert button **overwrites existing personnel projections with the PPS data**. It is prudent to preview the data using the following method before inserting.

PPS Data can be previewed **before** insertion. Input the project chartstring at setup, click Add, and go directly to Personnel projections to preview PPS entries (shown in the yellow rows below). \***Note**, the yellow rows contain data **only** if future PPS distribution data exists for the chosen chartstring and employee combination, otherwise you must enter salary and %DPE information manually.

B 52	Non-faculty academic salaries - 5020D	Monthly Salary Rate	02.22	00.00	00.00	00.00	00.00	00.00							
		Future Monthly Salary per PPS	-	-	-	-	-	-	83.33	83.33	83.33	83.33	83.33	83.33	83.
		% DPE	100.00%	100.000	100.005	100.000	100.005	100.000	0.00%	0.00%	0.005	0.00%	0.000	0.00%	
		Future % DPE per PPS	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.0
		Total Monthly Payroll	83.33	83.33	83.33	83.33	83.33	83.33		-	-	-	-	-	
	Non-faculty academic benefits - 5025D	% Benefit Rate-Estimated/Projected	596.35%	628.92%	628.92%	628.92%	1466.60%	2304.28%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00
		Benefits Subtotal	496,94	524,08	524.08	524.08	1,222,12	1.920.16							

Note that distribution changes made in PPS after initial insertion **will not** be reflected in Portfolio Projections unless you insert them again. Users can always manually adjust personnel projections **without** using the Insert functionality to avoid loss of any entered projections.

### Step-by-Step Future PPS Payroll Distribution Insertion

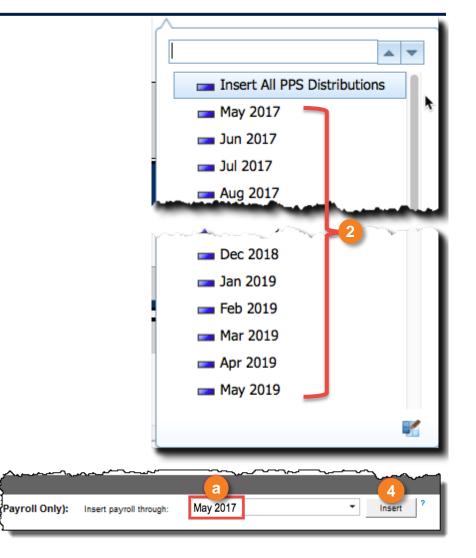
Enter the desired chartstring on the setup page and add it, then click the Go to Personnel Projections button.

After reviewing the PPS information available and determining how far you'd like to insert the information through, click the Insert payroll through drop-down menu

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University of California, San Francisco		Sponsored Projections - Personnel			
Vaccines that Replicate the Ne	Go to Setup	Insert Future PPS Payroll Distributions (Payroll Only):	Insert payroll through:	Insert All PPS Distributions	Insert ?
4301 - 333023 - 120483A - 03	Go to Budget Sheet				
Save	Go to Projections			▲ ▼	
			· · · · · · · · · · · · · · · · · · ·	Insert All PPS Distributions	
				📥 May 2017	
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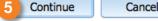
# Using the Insert Future PPS Payroll Feature

Click the desired date through which you'd like to insert the PPS Projections (default is to insert all PPS Distributions available, but this is **not recommended**). The selected date will provide the last month for PPS distribution data. The starting month defaults to the first open month of projections.



- The selected date will be inserted into the drop-down menu (a).
- 4 To perform the PPS Distribution insertion, click the Insert button in the Personnel sheet header.
- 5 You will be asked to confirm you wish to insert PPS Distribution data. Click the Continue button to insert projections, otherwise, if you have changed your mind or selected the incorrect through period, click Cancel.

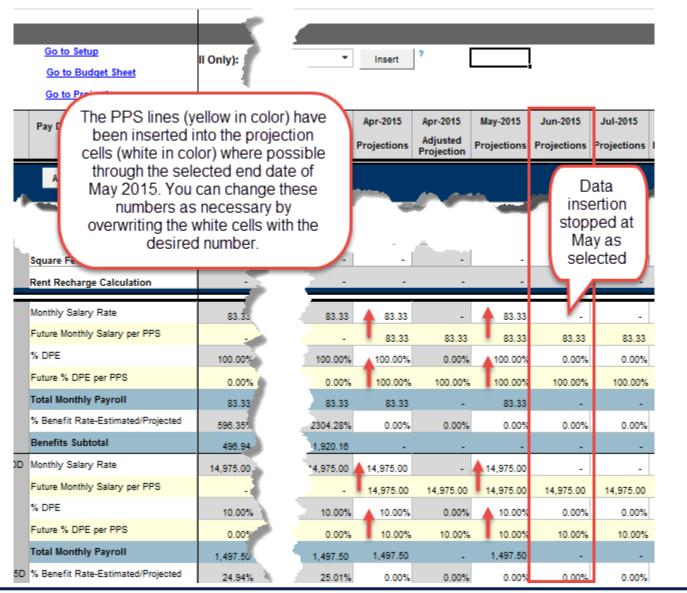
Are you sure you want to insert PPS distributions for the specified chartstring? This action will overwrite any existing projections with current distribution data from PPS.







The entries from PPS will be inserted from the yellow lines to the white projection lines through the selected end date, as shown. Note that while you can repeat this process, **all entered projections will be overwritten** with data from PPS from the beginning of the available projection range, therefore you should decide how far to insert PPS at the start of your projecting and insert manually going forward. However, if you are deleting all projections, you may wish to reinsert PPS data through a certain date.





### Entering the % Benefit Rate



When entering payroll projections, you may enter the **% Benefit Rate-Estimated/Projected**. Unless you enter the benefit rate as follows, **no benefits will be projected** for an employee:

- Faculty Portfolio calculates a % Benefit Rate-Estimated/Projected row on existing employees in the employee section *if* the employee received pay *and* benefits
- This number is only an estimate, and does not exclude retroactive pay, so you should use your best judgment as to whether this calculation should be used in benefit projections going forward
- If the existing employee does not have a benefits rate or you would like to change it in projections, enter it using the following steps:
- Navigate to the Personnel Projections sheet either from the Setup screen or one of the other projection sheets using the provided buttons or links (not shown)
- 2 Enter the benefit rate in your projection by using the % Benefit Rate-Estimated/Projected column:

Enter decimal points for percentages in this column, e.g. to enter 10%, enter .10

Repeat this process for all employees or To-Be-Hired (TBH) employees added to your personnel projections where necessary (not shown)

	De		496.94	496.94	496.94	496.94
Faculty salaries -	5000D Mo	nthly Salary Rate	14,975.00	14,975.00	14,975.00	14,975.00
<u>}</u>	Fu	ture Monthly Salary per PPS	-	-	-	
	%	DPE	10.00%	10.00%	10.00%	10.00%
	Fu	ture % DPE per PPS	0.00%	0.00%	0.00%	0.00%
	То	tal Monthly Payroll	1,497.50	1,497.50	1,497.50	1,497.50
Faculty benefits -	5005D %	Benefit Rate-Estimated/Projected	24.72%	24.94%	24.94%	24.94%
<u> </u>	Be	nefits Subtotal	370.11	373.42	373.42	373.42
	VL	A Leave Assess	178.20	178.20	178.20	178.20
	VL	A Relief	-	(662.13)	-	(165.53)
	VL	A Total	178.20	(483.93)	179.00	12.67
- 333023 - 120483A -			<u>Go to Setu</u> <u>Go to Bud</u> <u>Go to Pro</u>	get Sheet		Insert
cines that Replicate the Ne - 333023 - 120483A - Save Delete mployee		Account	Go to Bud	get Sheet		Apr-201
l - 333023 - 120483A - Save Delete		Account	<u>Go to Bud</u> <u>Go to Pro</u>	get Sheet jections		Apr-201
I - 333023 - 120483A - Save Delete		<ul> <li>Faculty salaries - ▼</li> </ul>	Go to Bud Go to Pro Pay Detail Add/Save	g <u>et Sheet</u> jections		Apr-201
I - 333023 - 120483A - Save Delete			<u>Go to Bud</u> <u>Go to Pro</u> Pay Detail	g <u>et Sheet</u> jections		Apr-201
I - 333023 - 120483A - Save Delete		<ul> <li>Faculty salaries - ▼</li> </ul>	Go to Bud Go to Pro Pay Detail Add/Save	g <u>et Sheet</u> jections		Apr-201: Projectio
I - 333023 - 120483A - Save Delete		<ul> <li>Faculty salaries - ▼</li> </ul>	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate Hours on Proje	get Sheet jections Rate		Apr-2011 Projectio
I - 333023 - 120483A - Save Delete		<ul> <li>Faculty salaries - </li> <li>5000D</li> </ul>	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate	get Sheet jections Rate	Projected	Apr-201: Projectio
I - 333023 - 120483A - Save Delete mployee BH Employee: 	Estimat	Faculty salaries - 5000D Faculty benefits - 5005D	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate Hours on Project % Benefit Rate	get Sheet jections Rate	Projected	Apr-2011 Projectio
I - 333023 - 120483A - Save Delete mployee BH Employee:	Estimat benefit	Faculty salaries - 5000D Faculty benefits - 5005D	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate Hours on Prole % Benefit Rate VLA Leave Ass	Rate Rate Estimated/F	Projected	Apr-2011 Projectio
I - 333023 - 120483A - Save Delete mployee BH Employee:	Estimat benefit	Faculty salaries - 5000D Faculty benefits - 5005D There the ed/Projected rate for each nployee in this row	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate Hours on Proie % Benefit Rate VLA Leave Ass VLA Relief Flat amount pa	e Rate Estimated/F ess y nefits		Apr-201: Projectio
I - 333023 - 120483A - Save Delete mployee BH Employee:	Estimat benefit	Faculty salaries - 5000D Faculty benefits - 5005D hter the ed/Projected rate for each nployee in this	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate Hours on Proie % Benefit Rate. VLA Leave Ass VLA Relief	e get Sheet jections Rate Estimated/F sess y nefits Calculation		Apr-2011 Projectio
I - 333023 - 120483A - Save Delete mployee BH Employee:	Estimat benefit	Faculty salaries - 5000D Faculty benefits - 5005D There the ed/Projected rate for each nployee in this row	Go to Bud Go to Pro Pay Detail Add/Save Monthly Salary % DPE Hourly Rate Hourly Rate Hours on Proje % Benefit Rate VLA Leave Ass VLA Relief Flat amount pa Flat amount be % DPE for Rent	e get Sheet jections Rate Estimated/F sess y nefits Calculation		Apr-20 Projection 0. 3. 160 5. 2. 10. 10. 10. 10. 10. 10. 10. 10



# **Adding Pay Elements to Existing Personnel Projections**

In the employee section of the personnel sheet, only rows with Actuals or projection data are displayed; rows without data are suppressed. For this reason you may not see a pay element row that you wish to use in your projections, such as % Benefit Rate-

Estimated/Projected, VLA Leave Assessment, or Flat Amount Pay (such as stipends). To add a pay element row to an existing employee's record, use the TBH section of the Personnel sheet.

From the Personnel Projection sheet, click the drop-down in the upper right-hand corner of the TBH Employee

section as shown:



- 2 Search for the employee to add:
  - Type your search term in the search field. You can type names, or an employee ID (02xxxxxxx)
  - Use the results icons to switch between matches, or use the scroll bars and page slider, if necessary, to locate the correct employee in the results
  - Click the employee name which you wish to add



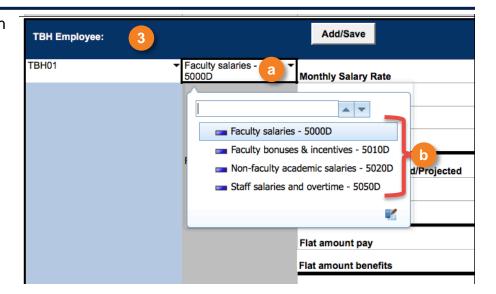
Faculty Portfolio Projections Interactive Job Aid

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# Adding Pay Elements to Existing Personnel Projections



- Select appropriate account containing the pay element you wish to add
  - Click the account drop-down
  - Choose the appropriate account from the list by clicking it



TBH Employee:	b Add/Save				
E Faculty salaries - 5000D ▼	Monthly Salary Rate	-	-	-	-
	% DPE	0%	0.00%	0.00%	0.00
4	Hourly Rate	-	-	-	
	Hours on Project	-	-	-	
Enter projection data for the	% Benefit Rate-Estimated/Projected	0%	0.00%	0.00%	0.00
correct month (white cells only)	VLA Leave Assess	-	-	-	
on the row for the pay element you want to add to the	VLA Relief	-	-	a	
employee or TBH. You can add	Flat amount pay	-		1,500.00	
as many pay elements as you wish by entering projection data	Flat amount be	•	-	-	
in multiple pay element rows. In this example, we are only	e for Rent Calculation	0%	0.00%	0.00%	0.00
adding \$1,500 in projected Flat	Cost per Square Foot	-	-	-	
amount pay to this employee.	Square Feet	-	-	-	
	Rent Recharge Calculation	_			

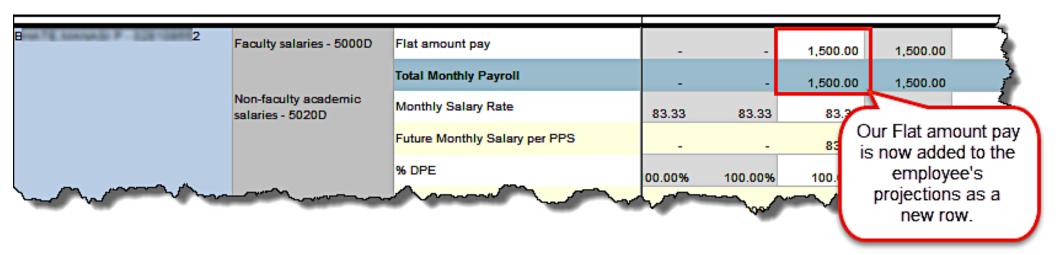
- To add a pay element to the employee or TBH's projections
  - a Enter data in the white cells of the corresponding columns (months) and pay elements (rows) where you'd like to add projection data
- Click the Add/Save button to add the projection rows and pay elements to the employee



# Adding Pay Elements to Existing Personnel Projections



The newly added row(s) display beneath the TBH section in the employee's individual projections section:



You can repeat the process as many times as necessary for any TBH or employee to add pay elements to their projection sections.





## **Rent Recharge Calculation Tool**



You may need to calculate a **Rent Recharge** for employees. A section is available on the Personnel Projections sheet that will calculate this for you in three easy steps:

- 1 On the Personnel Projection sheet, follow the procedures to select a TBH or employee and account
- 2 In the **Rent Calculation** section, enter the following:
  - a %DPE for Rent Calculation (entered in decimal format, e.g. .20 for 20%)
  - Cost per Square Foot
     Number of Square Feet
- Click the Add/Save button to save your entries. Note, as in the example you can enter other pay elements at the same time as entering the rent calculation
- The **Rent Recharge** is calculated by the system on save (%DPE **x** Cost per SF **x** SF) and displays in the TBH and Employee section below the TBH Employee entry fields. Repeat the process for all employees or TBHs requiring rent recharge calculations.

Employee	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Pay Detail	May-zo+o	-	~~~Jar-2015/~	Aug
			Projections	Projections	Projections	Projec
TBH Employee:	1	Add/Save 3				
BH01	<ul> <li>Faculty salaries - 5000D</li> </ul>	Monthly Salary Rate	-	-	-	
		% DPE	0.00%	0.00%	0.00%	
		Hourly Rate	57.00	57.00	57.00	
		Hours on Project	160.00	160.00	160.00	
	Faculty benefits - 5005	0 % Benefit Rate-Estimated/Projected	28.00%	28.00%	28.00%	
		VLA Leave Assess	-	-	-	
		VLA Relief	-	-	-	
		Flat amount pay	-	-	-	
		Flat amount benefits	2	1		
	Rent Calculation	% DPE for Rent Calculation	a 15.00%	15.00%	15.00%	
		Cost per Square Foot	b 15.00	15.00	15.00	
		Square Feet	<b>C</b> 100.00	100.00	100.00	
		Rent Recharge Calculation	-	-	-	

	Benefits Subtotal	-	2,097.60	2,097.60
Rent Calculation	% DPE for Rent Calculation	15.00%	15.00%	15.00%
	Cost per Square Foot	15.00	15.00	15.00
	Square Feet	100.00	100.00	100.00
4	Rent Recharge Calculation	225.00	225.00	225.00





Once rent has been projected to an employee and saved, the data is visible in the Projections Sheet under Expense account **5300C – Occupancy Expense** and is titled "**Rent calculated from Personnel sheet**". This will appear in reports in the 5300D Rental/lease – space/facility Account.

Enter any non-employee related facility, lease, or rental expenses using the 5300D, 5301D, and 5310D rows provided in the Projection sheet. Note you will need to expand to level D as shown in the picture to access the available projection rows.

	TOTAL PERSONNEL	\$ 13,254	\$ 13,771	\$ 13,771
		0	0	0
<u>5201C - Sponsored proj - capital equip</u>		0	0	0
5300C - Occupancy expense		225	225	225
5300D - Rental/lease - space/facility		0	0	0
5301D - General facilities services		0	0	0
5310D - Repairs/alter/maint-facilities		0	0	0
Rent calculated from Personnel sheet		225	225	225
		0	0	0







# **Overview – Personnel Projections by Employee**



### Personnel Projections by Employee Explained

#### What are Personnel Projections by Employee?

If an employee works on multiple projects, it may be more efficient to update the employee's Salary, Benefits, VLA, and % DPE projections for all of their related projects. The **Personnel Projections by Employee** sheet brings together all of the chartstrings for which an employee has been paid, has future PPS distributions, or has existing projections. You may enter the following projections for the appropriate chartstring(s) all in one easy-to-use projections sheet:

- Monthly/Hourly Salary Rates
- % DPE
- % Benefit Rate-Estimated/Projected
- VLA Leave Assessment
- VLA Relief

Working in the sheet is very similar to working in any of the other projections sheets available in Portfolio Projections and provides a rolling 60-month projection period. Projections, once entered and saved in the **Personnel Projections by Employee** sheet are visible in the **Standard**, **Extended**, and **Non-Sponsored Projections** sheets. Likewise, any projections entered and saved from the Standard, Extended, and Non-Sponsored Projections are also displayed in the **Personnel Projections by Employee** sheet.

#### Accessing the Projections by Employee Sheet

- Log into MyReports by going to MyAccess, signing in with your SFID or campus ID and Password (Scroll down to and click MyReports in the Application list)
- Click on the **Portfolio Projections** tab and then the **Personnel Projections by Employee** link

Faculty Portfolio	Portfolio Projections
Standard Proje	ections
Enables users to	p project up to 24 months of budget, expenses, and other changes for Sponsored projects. Projections, once
published, are c	onsolidated into reports with the actual expenditures to provide a projected balance.
Extended Proj	actions
Same as standa	rd projections but provides a rolling 60-month projection period.
Non-Sponsore	d Projections
Enables users to	project up to 5 fiscal years of revenue, expenses, and other changes for <b>Non-Sponsored</b> projects. Projections,
	are consolidated into reports with the actual revenue, expenses, and other changes to provide a projected balance.
Personnel Pro	jections by Employee
Enables users to	o project personnel expenses across multiple funding sources, including both Sponsored and Non-Sponsored pro
for a single emp	loyee over a rolling 60-month period. Saved Projections are visible in the Standard, Extended, and Non-Sponsored
Projections shee	ets. Projections, once published, are consolidated into reports with the actual expenditures to provide a projected ba
Comments for	Faculty
Enables users to	o enter or update comments that are not specific to a particular chartstring. Published comments will appear in
	report found on the Faculty Portfolio tab.





### Selecting the Employee

( c )

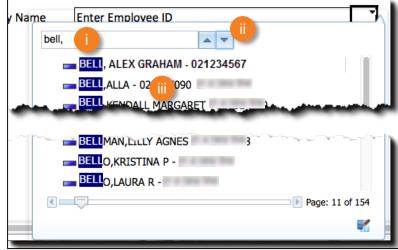
The Personnel Projections by Employee page displays. To select the employee:



If you know the employee's ID number (begins with 02), you may enter it directly into the Enter Employee ID or Search by Name field. (Direct entry of the employee's name is not available).

Click the Add button. The employee's name will then populate the grey field

- If you do not know the employee's ID number; click the Enter Employee ID or Search by Name drop-down menu arrow
  - Begin typing the last name of the employee in the search box
  - Use the results
    Icons to switch between matches, or use the scroll bars and page slider, if necessary, to locate the correct employee in the results
  - Click the the desired employee to select them. The employee's name will then populate the grey field (c).
- 2 By default, the Personnel Projections by Employee sheet displays projection entry rows for %DPE or hours. To display benefit, salary rate, or VLA records, select the desired corresponding checkbox(es) (optional). Note you may also show and hide these areas while working in the projections sheet.
  - Click the **Go to Personnel Projections** button to continue.



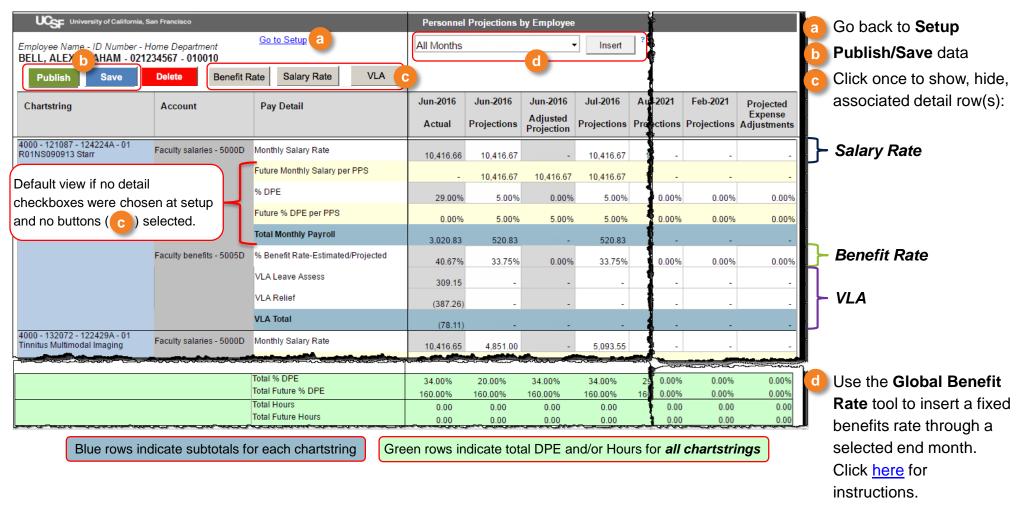


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### Working in the Personnel Projections by Employee Sheet

The Personnel Projections by Employee sheet for the selected employee displays:



Currently, you cannot systematically insert future PPS Projections from the Personnel Projections by Employee sheet. To
systematically insert future PPS projections, use the personnel sheet in the Standard, Extended, or Non-Sponsored Projections,
save your work, and return to this sheet to view inserted PPS projections.





### Working in the Personnel Projections by Employee Sheet

Enter the desired projection data:

Chartstring	Account	Pay Detail		Mar-2016 Actual	Apr-2016 Actual	May-2016 Actual	Jun-2016 Actual	Jun-2016 Projections	Jun-2016 Adjusted	Jul-2016 Projections	Aug-2016 Projections	Sep-	,	Feb-2021 Projections	Projected Expense Adjustments
4000 - 121087 - 124224A - 01				Hotuur	Hotau	Hotau	Actual	Trojocuono	Projection	Trojocacino	Trojocaono	110]00	cuons	riojections	Aujusunents
R01NS090913 Starr	Faculty salaries - 5000D	Monthly Salar	ry Rate	19,996.80	1,753.20	10,416.60	10,416.66	10,416.67	-	10,416.67	10,416.67		- 1	-	-
		Future Monthl	y Salary per PPS		-	-	-	10.416.67	10,416.67	10.416.67	10.416.67	10,4	-		
		% DPE		5.00%	5.00%	5.00%	29.00%	5.00%	0.00%	5.00%	5.00%		0.00%	0.00%	0.00%
Individual		Future % DPE	per PPS	0.00%	0.00%	0.00%	0.00%	5.00%	5.00%	5.00%	5.00%		0.00%	0.00%	0.00%
chartstring		Total Monthly	Payroll	999.84	87.66	520.83	3.020.83	520.83	0.00%	520.83	520.83	1	0.0070	0.0070	0.0070
data and subtotal:	Faculty benefits - 5005D	% Benefit Rat	e-Estimated/Projected	33.99%	110.19%	40.72%	40.67%	33.75%	0.00%		33.75%	2	33.75%	33.75%	33.75%
Subiolal.		VLA Leave As	ssess	112.05	21.39	63.91	309.15	33.7370	0.00%	33.13%	33.1376	1	55.75%		55.75%
		VLA Relief		(92.51)	21.55		(387.26)								
		VLA Total		19.54	21.39	63.91	(78.11)		-		-			ot yet sa	
4000 - 132072 - 122429A - 01 Finnitus Multimodal Imaging	Faculty salaries - 5000D	Monthly Salar	y Rate	28,291.00	(6,541.00)	10,416.55	10.416.65	4,851.00	-	5.093.55	5.093.55	5.0	<u>ـ</u>	-	-
		Future Month	Draia atian data			_	-	10.416.67	10.416.67	10.416.67	10.416.67	10.4		_	-
		% DPE	Projection data entered in white	-		-11.00%	-20.00%	4.00%			4.00%		0.00%	0.00%	0.00%
		Future % DP		0.00%	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	4.00%	1	0.00%	0.00%	0.00%
		Total Monthly	Payroll	1131.64	(261.64)	(1,145.82)	(2,083.33)			203.74	203.74	20		-	-
	Facultubenetite 50050	% Benefit Pat	e.Fstimated/Projected										han	-	
		Total % DPE		80.00%	80.00%	80.00%	80.00%	34.00%	20.00%	34.00%	34.00%	20	0.00%	0.00%	0.00%
		Total Future %	6 DPE	0.00%	0.00%	0.00%	0.00%	160.00%	160.00%		160.00%	16	0.00%	0.00%	0.00%
		Total Hours Total Future H	louro	0.00		0.00	0.00						0.00	0.00	0.00
		Total Future H	iouis	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00	0.00	0.00

- Projections can only be entered in the *white cells*. You may enter each cell manually, or copy (CTRL + C) a cell's value and then paste (CTRL + V) into any number of selected cells.
- Unsaved entries are shown in green text (for example 33.75%) until saved.
- Click the Save button to save and make changes visible across all personnel projections sheets. Likewise, if you enter and Save personnel projection data in the Standard, Extended, or Non-Sponsored sheets, that data is reflected on the Personnel Projections by Employee sheet.
- Using the Save button does not make data visible in Faculty Portfolio reports; only published projections are visible in reports. After you have saved your projections and are ready to view your projections in Faculty Portfolio reports, click the Publish button.
- You can also insert the **Benefit Rate** globally using the **Insert Global Benefit Rate** feature. See details on the next page.





### Insert a Global Benefit Rate for an Employee's Chartstrings

If an employee is working on many projects, entering a benefits rate for each project can be tedious. The Personnel Projections by Employee sheet provides an easy-to-use **Global Benefit Rate** interface to help solve this issue:

	cisco				Person	nel Projectio	ons				2	
mployee Name - ID Number - Home L ELL, ALEX GRAHAM - 021234567 - 0		<u>Go to S</u>	etup		Globa	l Benefit Ra	ate: 1 3	3.75%		nths		<ul> <li>Insert</li> </ul>
Publish Save Bene	efit Rate	Salary Rate	VLA			~~~~~			~~ <sup>3</sup>	All Mor	aths	
o use the <b>Global Benef</b>		enefit R	<b>ate</b> to be	e used fo	or <b>all ch</b> a	ortstring	<b>is</b> related	to the		May 20	017 17	Oct-2017 rojections
employee.										Aug 201	117	
2 To insert the enter	ed benef	it rate:								Oct 20:	/	0.00%
a into <b>all</b> proje	ection cell	ls for <i>all</i>	60 rollin	ig mont	<b>hs</b> , click	Insert	-or –		-1v	~~~~		مررميالمك
b from the cur Months dro	p-down n	nenu and	then se	lect the	desired e					<ul> <li>Mar 20</li> <li>Apr 20</li> <li>May 20</li> <li>May 20</li> </ul>	20	
from the list.	. <i>Then,</i> cl	ick the Ir	isert but	tton (a	).					<ul> <li>Jun 202</li> <li>Jul 202</li> </ul>		
3 Click the <b>OK</b> butto	on (not sh	own) to o	confirm y	/ou want	t to inser						20	
	on (not sh	own) to o	confirm y	/ou want	t to inser		ì.			Jul 202	20	is
3 Click the <b>OK</b> butto	on (not sh	own) to o	confirm y	/ou want	t to inser	tificatior	). Jul-2016	Aug-2016		— Jul 202 — Aug 20	The chosen rate populated either available % <b>Ben</b>	is for all efit Rate-
<ul> <li>3 Click the <b>OK</b> butto</li> <li>4 Click the <b>OK</b> butto</li> </ul>	on (not sh on (not sh	own) to o	confirm y dismiss t	vou want	t to inser	tificatior	Jul-2016	Aug-2016 Projections	Sep-2016	<ul> <li>Jul 202</li> <li>Aug 20</li> <li>Oct-20</li> </ul>	The chosen rate populated either available % Ben Estimated/Proje	is for <i>all</i> efit Rate- ected
<ul> <li>Click the <b>OK</b> butto</li> <li>Click the <b>OK</b> butto</li> <li>Pay Detail</li> </ul>	on (not sh on (not sh <sub>Mar-2016</sub>	own) to ( own) to ( Apr-2016	confirm y dismiss t May-2016	/ou want he comp Jun-2016	t to insert oleted no	tificatior Jun-2016 Adjusted	Jul-2016	-	Sep-2016	<ul> <li>Jul 202</li> <li>Aug 20</li> <li>Oct-20</li> </ul>	The chosen rate populated either available % Ben Estimated/Proje	is for <b>all</b> efit Rate- ected ) cells, or for
<ul> <li>Click the OK butto</li> <li>Click the OK butto</li> <li>Pay Detail</li> </ul>	on (not sh on (not sh Mar-2016 Actual	own) to o own) to o Apr-2016 Actual	confirm y dismiss t May-2016 Actual	/ou want he comp Jun-2016 Actual	t to insert oleted no Jun-2016 Projections	tificatior Jun-2016 Adjusted	Jul-2016 Projections	Projections	Sep-2016	Jul 202 Aug 20 Oct-20 Projectio	The chosen rate populated either available % Ben Estimated/Proje	is for <i>all</i> efit Rate- ected ) cells, or for urrent
<ul> <li>Click the OK butto</li> <li>Click the OK butto</li> <li>Pay Detail</li> <li>Monthly Salary Rate</li> <li>Future Monthly Salary per PPS</li> </ul>	on (not sh on (not sh Mar-2016 Actual	own) to o own) to o Apr-2016 Actual	confirm y dismiss t May-2016 Actual	/ou want he comp Jun-2016 Actual	t to insert oleted no Jun-2016 Projections 10,416.67	tification Jun-2016 Adjusted Projection	Jul-2016 Projections 10,416.67	Projections	Sep-2016 Projections	Jul 202 Aug 20 Oct-20 Projectio	The chosen rate populated either available % Ben Estimated/Proje projection (white those from the c	is for <i>all</i> efit Rate- ected ) cells, or for urrent
3 Click the <b>OK</b> butto 4 Click the <b>OK</b> butto Pay Detail Monthly Salary Rate Future Monthly Salary per PPS % DPE	on (not sh on (not sh Mar-2016 Actual 19,996.80	own) to ( own) to ( Apr-2016 Actual 1,753.20	Confirm y dismiss t May-2016 Actual 10,416.60	Jun-2016 Actual	t to insert oleted no Jun-2016 Projections 10,416.67 10,416.67 5.00%	tification Jun-2016 Adjusted Projection - 10,416.67 0.00%	Jul-2016 Projections 10,416.67 10,416.67 5.00%	Projections 10,416.67 10,416.67	Sep-2016 Projections - 10,416.67	<ul> <li>Jul 202</li> <li>Aug 20</li> <li>Oct-20</li> <li>Projection</li> <li>10,410</li> <li>0.</li> </ul>	The chosen rate populated either available % Ben Estimated/Proje projection (white those from the c month through	is for <i>all</i> efit Rate- ected ) cells, or for urrent
3 Click the OK butto 4 Click the OK butto Pay Detail Monthly Salary Rate Future Monthly Salary per PPS % DPE Future % DPE per PPS	on (not sh on (not sh Mar-2016 Actual 19,996.80	own) to o own) to o Apr-2016 Actual 1,753.20	confirm y dismiss t May-2016 Actual 10,416.60	/ou want he comp Jun-2016 Actual 10,416.66	t to insert oleted no Jun-2016 Projections 10,416.67 10,416.67 5.00%	tification Jun-2016 Adjusted Projection - 10,416.67 0.00%	Jul-2016 Projections 10,416.67 10,416.67 5.00%	Projections 10,416.67 10,416.67 5.00%	Sep-2016 Projections - 10,416.67 0.00%	<ul> <li>Jul 202</li> <li>Aug 20</li> <li>Oct-20</li> <li>Projection</li> <li>10,410</li> <li>0.</li> </ul>	The chosen rate populated either available % Ben Estimated/Proje projection (white those from the c month <i>through</i> the end month.	is for <i>all</i> efit Rate- ected ) cells, or for urrent
<ul> <li>Click the <b>OK</b> butto</li> <li>Click the <b>OK</b> butto</li> </ul>	on (not sh on (not sh Mar-2016 Actual 19,996.80 	own) to o own) to o Apr-2016 Actual 1,753.20 - 5.00% 0.00%	Confirm y dismiss t May-2016 Actual 10,416.60 - 5.00% 0.00%	vou want the comp Jun-2016 Actual 10,416.66 - 29.00% 0.00%	t to insert oleted no Jun-2016 Projections 10,416.67 5.00% 5.00%	tification Jun-2016 Adjusted Projection - 10,416.67 0.00%	Jul-2016 Projections 10,416.67 10,416.67 5.00% 5.00%	Projections 10,416.67 10,416.67 5.00%	Sep-2016 Projections - 10,416.67 0.00%	<ul> <li>Jul 202</li> <li>Aug 20</li> <li>Oct-20</li> <li>Projection</li> <li>10,410</li> <li>0.</li> <li>5.</li> </ul>	The chosen rate populated either available % Ben Estimated/Proje projection (white those from the c month <i>through</i> the end month.	is for <b>all</b> efit Rate- ected ) cells, or for urrent





### Deleting Projections and Adding Comments

Comments entered on this sheet *do not* display on any of the Faculty Portfolio reports.

- 1 If you need to delete the projections for the employee you can use the **Delete Projections** button. **WARNING: Delete Projections** deletes **all displayed projections from all displayed chartstrings** from **all sheets** in Faculty Portfolio Projections (once you have saved and published). **DO NOT** publish unless you are sure you want to remove **ALL** projections.
- 2 Scroll down to the bottom of the sheet to find the **Comments** field and doubleclick it to open. Type comments and press enter. Comments entered are displayed in green until saved.

*Caution*, if you do not wish to *overwrite previously entered comments*, you *must double-click* the **Comments** box prior to typing your entry. If you single-click and begin typing, any previously entered comments will be cleared.

### Saving and Publishing

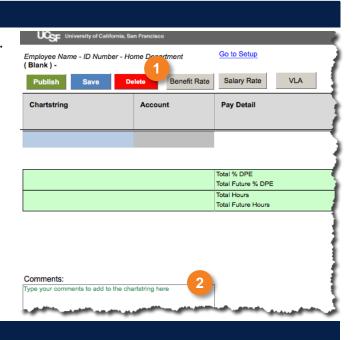
- To **Save**, click the **Save** button in the upper-left corner of the sheet; once the screen is refreshed, values are saved and visible across personnel projection sheets.
- To **Publish** (show your saved projections in **Faculty Portfolio Reports**), click the **Publish** button, then **OK** to confirm, and **OK** once more to dismiss the completion notification.

For detailed Saving and Publishing steps, please see the Saving & Publishing Projections section of this job aid.

Caution: saving entries on the Personnel Projections by Employee sheet also overwrites the same entries on all other sheets.

### Tips & Tricks

- If you would like to insert PPS projections you must do so from personnel projections in the **Standard**, **Extended**, or **Non-Sponsored Projections** sheets, then return to the **Personnel Projections by Employee** sheet to view.
- When you publish projections from this sheet, your job is placed in a queue. The time it takes for your projections to display depends on the number of chartstrings being populated. The more chartstrings, the more time it will take to make all published changes. If your projections are not visible, wait a few minutes before running a report.
- This sheet is most helpful in populating payroll and benefit projections for employees that are working on multiple chartstrings. For other employees, entering personnel projections in the **Regular**, **Extended**, or **Non-Sponsored Projections** personnel sheet may be a more appropriate option.





### Saving and Publishing Projections



Faculty Portfolio Projections Interactive Job Aid

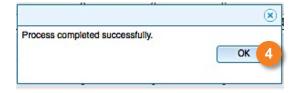
### Choose whether to Save or Publish

- The projection can be Saved for later editing note this does not publish the projections to MyReports
- 2 The projection can be **Published** to "push" your projection to MyReports. Publishing is only available from the Projections sheet, not the Personnel or Budget (Sponsored awards only) sheets.
- Confirm Publishing
  - 3 After clicking the **Publish** button, confirm that you want to publish by clicking the **Continue** button in the confirmation popup message

The publishing process runs (this can take a few minutes) depending on the amount and length of entered projections) and returns a message that it has been completed successfully. Click the **OK** button to continue.

- Once published, the last published date, time and publishing user is displayed on top of the Projection sheet
- Go to Setup Go to Budget Sheet Go to Personnel Sheet
- Project-Activity Period: 03/01/2014 02/28/2015 Award Period: 03/01/2012 - 02/29/2016
- Last Published to Reports on MAY 13, 2015 8:23 a.m. by Burgess, Michael T





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# **Enter Comments for Faculty Member**



### Navigate to the Comments for Faculty Application

Comments can be added to display on the MyPortfolio Report for a specific faculty member (once published). These comments do not display with the projection chartstring and are only attached to the Faculty member's MyPortfolio report.

1 After logging into **MyReports**, click the **Portfolio Projections** tab

#### Click the Comments for Faculty link

Faculty Portfolio Portfolio Projections

#### Standard Projections

Enables users to project up to 24 months of budget, expenses, and other changes for **Sponsored** projects. Projections, once published, are consolidated into reports with the actual expenditures to provide a projected balance.

#### Extended Projections

Same as standard projections but provides a rolling 60-month projection period.

#### Non-Sponsored Projections

Enables users to project up to 5 fiscal years of revenue, expenses, and other changes for Non-Sponsored projects. Projections, once published, are consolidated into reports with the actual revenue, expenses, and other changes to provide a projected balance

#### Personnel Projections by Employee

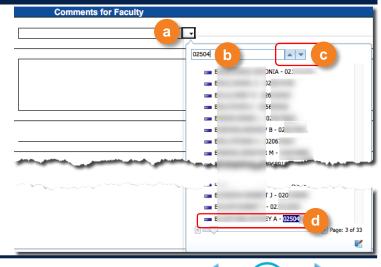
Enables users to project personnel expenses across multiple funding sources, including both **Sponsored** and **Non-Sponsored** projects, for a single employee over a rolling 60-month period. Saved Projections are visible in the Standard, Extended, and Non-Sponsored Projections sheets. Projections, once published, are consolidated into reports with the actual expenditures to provide a projected balance.

Comments for Faculty 2

Enables users to enter or update comments that are not specific to a particular chartstring. Published comments will appear in the **MyPortfolio** report found on the Faculty Portfolio tab.

#### Choose the Faculty Member

- 3 Select the faculty member whose portfolio comments will be saved to
  - Click the drop-down menu for Enter Faculty Member's Name
  - Begin typing either the faculty member's employee ID (begins with 02), or their name in the search field
  - Use the results icons to switch between matches, or use the scroll bars and page slider, if necessary, to locate the correct employee in the results
    - Click the desired faculty member





# **Enter Comments for Faculty Member**

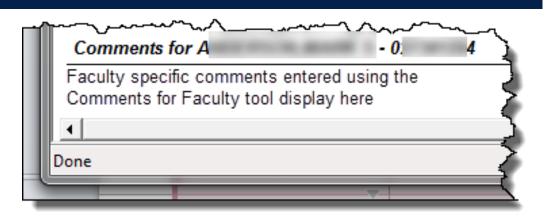


- Double click and enter the desired comments in the comments box.
   Comments are limited to 4000 characters, so keep this in mind if aggregating to existing comments.
- 5 Click the Save button if you'd just like to save your comments without publishing them to the MyPortfolio Report
- 6 Click the Publish button to "push" your comments to MyReports, then click OK to dismiss the pop-up message. The comments are then visible in the MyPortfolio report.

#### Example Comment in MyPortfolio Report

Faculty specific comments can be found at the very bottom of the MyPortfolio Report, underneath the total. If there are no specific comments, the message "No comments found" displays.

	Comments for Faculty				
Faculty Name	*Enter Faculty Member's Name	DOE, JOHN B - 02345678			
Comment Entry	Enter Comments for Faculty Member: (Comments are limited to 4,000 characters)	Comments for specific Faculty display on the MyPortfolio Report			
Published by	Comments Last Published by:				









# **Enter Comments for Chartstring**

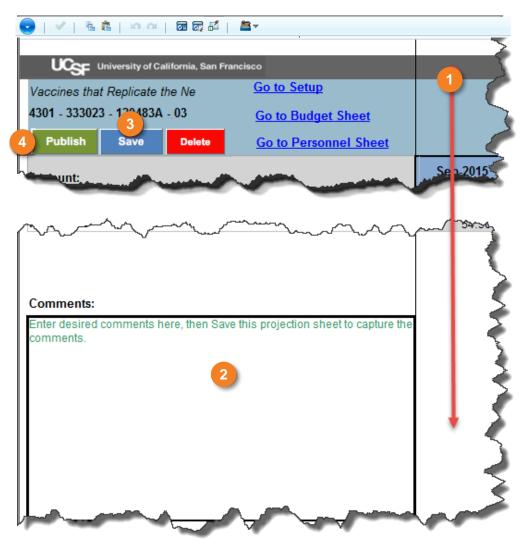


In addition to doing so on the setup page, you can also enter comments for the specific chartstring on the **Standard**, **Extended**, and **Non-Sponsored** projection sheets.

- From within any projection page (Budget, Personnel, or Projections) scroll all the way down to the bottom of the screen
- 2 Enter desired comments in the Comments box as illustrated. As with any data entered, comments are green, indicating they are not yet saved.
- 3 Select the Save button in order to save comments and updates to the projection sheet
- 4 Click Publish to push projection and comment data to MyReports

Once you've published projections that contain the added chartstring, they are visible on the MyPortfolio and Program Portfolio Reports.

Note the commenting functionality *is not* the same on the **Personnel Projections by Employee** sheet. See <u>Personnel</u> <u>Projections by Employee – Adding & Comments and</u> <u>Deleting Projections</u> for details.







## **Enter Comments for a Specific Projection Cell**



3

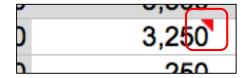
Cancel

X

Any white projection cell in all of the available projection sheets allows individual cell comments. To enter comments for a cell:

- Locate the desired white cell and right-click it
- Click **Add Comment**; the Add Comment pop-up box displays
- Enter the desired comments
- Click OK

If a cell already contains comments, a red arrow will display in the upper right-hand corner:



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Drill

Data Spread

Add Comment...

Browse Comments...

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3,25

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Add Comment

Add the comment for the cell.

OK

When done, click OK.

3,000

To review existing comments, right-click the cell you want to review, and click Browse Comments...

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0		Add Comment
03,5		Durante Commente
0 3,2		Browse Comments
	250	050

Browse Comments			6
Comment	User	Date	
Enter cell specific comments in the how Add as much as required euroeu, and appen	EDS/Burgess, Michael T	6/23/2017, 9:53:05 AM	
Add the comment for the cell. When done, click OK.	EDS/Burgess, Michael T	6/23/2017, 9:54:19 AM	
	Cancel		

