Sponsored Award Management (SAM) tool

Overview:

The SAMtool is a financial and budget management tool for sponsored projects intended to reduce administrative burden, the need for redundant systems, and improve the accuracy and timeliness of data and reporting efficiency.

It provides the user with the power to harness multiple reporting and budget planning capabilities in a single portal, in addition to the current financial reporting tools.

Some of the specific features of the SAMtool are:

- "Dashboard" type reporting for Chairs, Deans and VPR providing a summary of department, school/college, and university level sponsored activities by PIs, total sponsored budget, F&A recovery, etc.
- At-a-glance summary views for PIs and Administrators on awards for which they are responsible
- Burn-rate indicators for potential over or under spending on awards
- Ability to drill down from summary data to multiple sub-levels of summary data, and to the transaction level while also providing links to source documentation
- Categorize financial data to mirror OSP Budget Template Categories providing intuitive analysis throughout the award lifecycle
- Enable PIs and Admins to create "what-if" scenarios for project planning, including commitments throughout the grant cycle
- Clean, consistent, and concise reporting for all sponsored awards
- Reduce / Eliminate need for shadow systems

Accessing the SAMtool:

Open Browser.

This brings you to the *MySlice Sign In page*. Enter your NetID and Password and click on the *Sign In* button.

Sponsored Award Management (SAM) tool

You will see your own *MySlice* *Page*.

Under ***Financial Services*** Pagelet, you will see ***Sponsored Award Mgmt Tool (SAMtool)***, and one to two links based on your access.
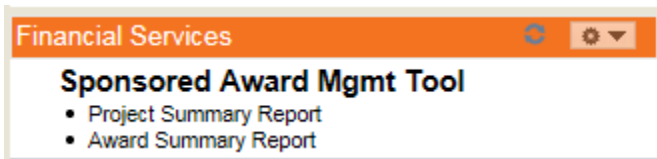
Access to the tool is dependent upon your current security level for Grants.

Award and Project Summary Reports will be available to the following users:

- Award PI
- Departmental Administrators who currently have award level access in FAST

Project Summary Report will be available to the following users:

- Project PIs
- Project Managers
- Departmental Administrators who currently have project level access in FAST

The following navigation is intended to highlight some features of the report:

- *Award and Project Summaries based on your access and categorized by the OSP Budget template category*
- *Forward Funded Details and links to the Award Notes and Award Brief*
- *Drillable links from the Award/project to the transaction level data*
- *Burn Rate Indicator, burn rates with/without commitments, allowable remainder*
- *Links to HR Appointment Data and PO Inquiry*
- *Budget Scenarios that can be modified for "what-if" analysis*
- *Salary Summary by employee based on current payroll level security*
- *Participant Costs can be limited by name*
- *Equipment tag numbers will be available on transaction detail level*
- *Filters and Sorts for efficient data retrieval*
- *Data is exportable to pdf and Excel*
- *Fringe and F&A now roll up to related costs*
- *Total billed to Sponsor and Total payments received from Sponsor*

Sponsored Award Management (SAM) tool

AWARD SUMMARY REPORT

Click on **Award Summary Report** link
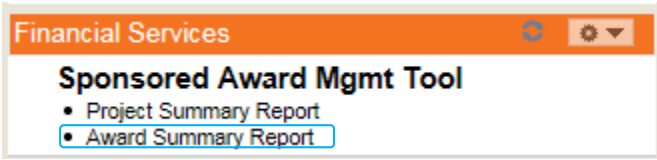
Any awards for which you have access will appear on the **Award Summary**

1. Filters: Enter a Value or click on the *magnifying glass* to select a value
2. Click the *search button* to poulate the Expense detail grid
3. All Links will allow you to drill down to the next level except fringe, indirect, and total costs.
4. *Grids* are exportable to Excel.
5. *General Tab* contains more demographic information.

Sponsored Award Management (SAM) tool

1. Ability to drill down on an award (CON number)
2. Total Billed (Invoiced) to Sponsor and Total Paid by Sponsor
3. Date Limits Available
4. Summarization of Direct and Cost Share Budget, Expenses, Commitments, and Pre-Encumbered (Requisitions) by OSP Budget Template Budget Categories

Expense Detail:

1. *Forward funded:* Although forward funded expenditures are reported, it is important to note that the budget is not included nor is it included in the available budget balance.
2. The page defaults to displaying activity directly charged to the awards (Project Expenditures tab). This includes budget, expenses, commitments and pre-encumbrances. To view the *cost share activity* on your awards, click on the Cost Share Tab. To see both, click on the expander.
3. Click on *budget category* to drill down for more detail
4. Click on *Award Summary – Data Search link* to limit by date range (further detail on next page).

Sponsored Award Management (SAM) tool

1. Link to Award Brief
2. Link to Award Notes

The transactions and amounts in these materials are fictitious and have been created for training purposes only.

Sponsored Award Management (SAM) tool

Searching by Date Parameters:

To see all expenditures and commitments for a specific time period, *click on Award Summary – Date Search* (**Note**: This will work the same way on the Project Summary – Date Search)

Limit by one of the following date filters:

- *Calendar Year:* Enter 4 digit calendar year (Example: **2015**. This will return data for activity from 1/1/15-12/31/15)

- *Fiscal Year:* Enter 'FY' and the last 2 digits of the fiscal year (Example: **FY15.** This will return data for activity from 7/1/14-6/30/15)

- *Calendar Date Range:* Enter **FROM** month and 4 digit calendar year and a **TO** month and 4 digits calendar year.

- *Fiscal Date Range:* Enter **FROM** month and 'FY' and the last 2 digits of the fiscal year

Sponsored Award Management (SAM) tool
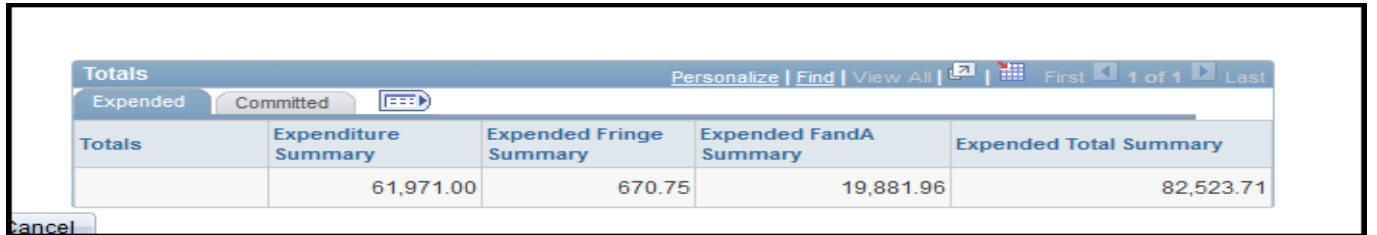
Misc. Tips and Tricks in the Award Summary:

- The *Cancel button* [Cancel] on the bottom left side of each page is your **"Back" button**.

- **Hover over any area that shows ". . . . ." under the field and a box will pop up with a descriptor of the item in that field.**
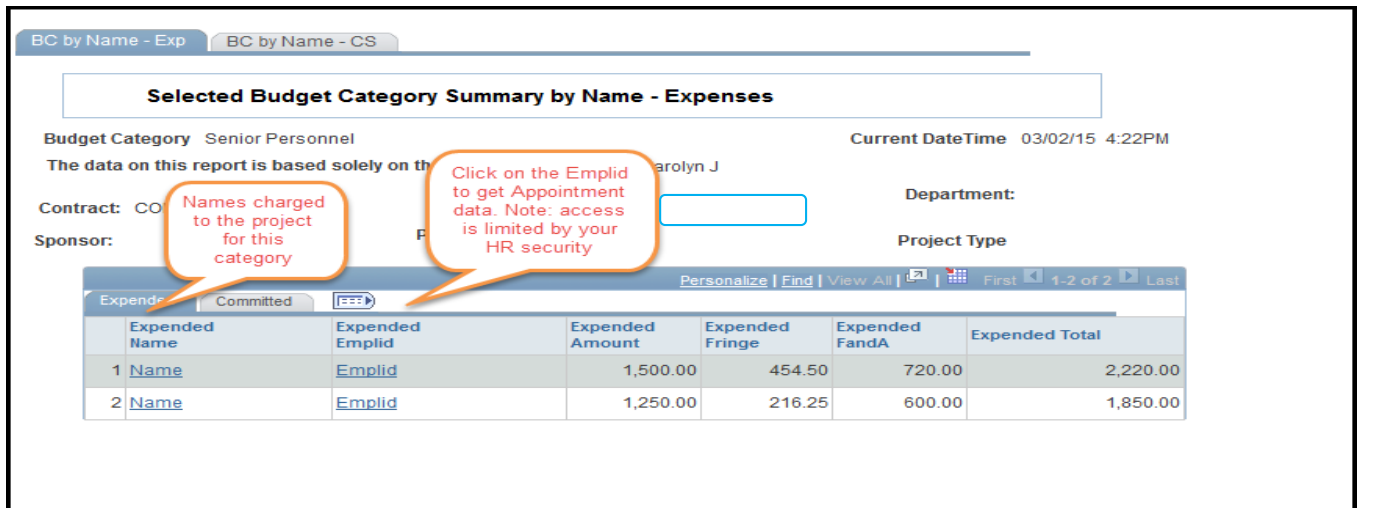
- **Note on the Budget Categories: Fringe and Indirect Costs are not "drillable".** In subsequent pages they will be associated with the expense incurred, but the totals will appear on the bottom grid (sample below).

- **Interested in reviewing salaries for employees and/or the related appointment information?** *Click on a Salary budget category > Budget Category by Employee Summary Link*

The transactions and amounts in these materials are fictitious and have been created for training purposes only.

Sponsored Award Management (SAM) tool

- **Interested in reviewing Participant Costs by Person?**

  Click on the PARTICIPANT COSTS Budget Category > Go to Participant Costs by Name Summary link

- **Does your sponsor allow for some flexibility in the budget and/or you would like projections on a budget to include commitments currently tracked outside the system? A what-if scenario?**

  Click on Contract Number > Project Id > Project Summary Detail by Period > Create Adjustment Scenario

Sponsored Award Management (SAM) tool

Project Summary Detail by Period - Expenses

Current DateTime 03/03/15 3:50PM User

The data on this report is based solely on the access of

Project: Sub project Project PI Project Dept:

Project Begin Date 02/24/2015 Project End Date 02/23/2016

Award: CON Award PI: Award Dept:

Award Begin Date 02/24/2015 Award End Date 02/23/2016

Sponsor: Primary Sponsor: Forward Funded: NO

Budget Period 1 Begin Date 02/24/2015 End Date 02/23/2016

Create Adjustment Scenario Select Scenario

Personalize | Find | 🖼 | 🎬 First 1-9 of 9 Last

	Budget Category	Budget	Expenses	Commits	Pre-Encumbered	Total Obligations	Available Budget	Pct Oblig to Budget	Manual Budget Adjust	Manual Encumbrance	Manual Available Budget
1	Senior Personnel	25,000.00	1,250.00	0.00	0.00	1,250.00	23,750.00	125			
2	Other Personnel	0.00	0.00	0.00	0.00	0.00	0.00	0			
3	Fringe Benefits	11,500.00	216.25	0.00	0.00	216.25	11,283.75	216			
4	Equipment	5,000.00	7,656.00	0.00	0.00	7,656.00	-2,656.00	765			
5	Travel	0.00	0.00	0.00	0.00	0.00	0.00	0			
6	Participant Costs	0.00	0.00	0.00	0.00	0.00	0.00	0			
7	Other Direct Costs	1,300.00	38,000.00	0.00	0.00	38,000.00	-36,700.00	380			
8	Permission Required	0.00	0.00	0.00	0.00	0.00	0.00	0			
9	Indirect Costs	18,144.00	18,943.80	0.00	0.00	18,943.80	-799.80	189			
	Totals =>	60,944.00	66,066.05	0.00	0.00	66,066.05	-5,122.05	660			

OK Cancel Apply

Exp by Bud Period | CS by Bud Period

Note: The Salary Commitments are only entered in the financial system for the current fiscal year. These salary commitments will align with the appropriate budget period on the Project Summary Detail by Period page.

Add a new Value Tab > Add. Enter your changes.

Print New Window Help

Manual Adjmnts

Manual Adjustments

Project 03849

Budget Period 1 Begin Date 02/24/2015 End Date 02/23/2016

Scenarios

Find | View All First 1 of 1 Last

Scenario 1

Description

Enter detail about this scenario here

Personalize | Find | 🖼 | 🎬 First 1-5 of 9 Last

	Unit	Project	Budget Period	Scenario	Seq	Budget Category	Adjusted Budget Expense	Adjusted Encumbered Expense	Adjusted Budget Cost Share	Adjusted Encumbered Cost Share
1	SYRUN	03849	1	1	1	Senior Personnel	0.00	0.00	0.00	0.00
2	SYRUN	03849	1	1	2	Other Personnel	0.00	0.00	0.00	0.00
3	SYRUN	03849	1	1	3	Fringe Benefits	0.00	0.00	0.00	0.00
4	SYRUN	03849	1	1	5	Equipment	5000.00	2355.00	0.00	0.00
5	SYRUN	03849	1	1	6	Travel	0.00	0.00	0.00	0.00
6	SYRUN	03849	1	1	7	Participant Costs	0.00	0.00	0.00	0.00
7	SYRUN	03849	1	1	8	Other Direct Costs	5000.00	0.00	0.00	0.00
8	SYRUN	03849	1	1	9	Permission Required	0.00	0.00	0.00	0.00
9	SYRUN	03849	1	1	10	Indirect Costs	0.00	0.00	0.00	0.00

OK Cancel Apply

Save.

Sponsored Award Management (SAM) tool

Here is your new projected available budget.

Note: This does not go into the financial system. This is strictly a tool to use for projections, and as such, is only available for current and future budget periods. Prior Periods are available for review only. This is strictly to be used as a forecasting tool.

Project Summary Detail by Period - Expenses

Current DateTime 03/03/15 3:50PM   User
The data on this report is based solely on the access of

Project: Sub project   Project PI   Project Dept:
Project Begin Date 02/24/2015   Project End Date   02/23/2016
Award: CON   Award PI: Award Dept:
Award Begin Date 02/24/2015   Award End Date   02/23/2016
Sponsor: Primary Sponsor: Forward Funded: NO

Budget Period 1   Begin Date 02/24/2015   End Date 02/23/2016

Create Adjustment Scenario   Select Scenario 1

Personalize | Find | | First 1-9 of 9 Last

|	Budget Category	Budget	Expenses	Commits	Pre-Encumbered	Total Obligations	Available Budget	Pct Oblig to Budget	Manual Budget Adjust	Manual Encumbrance	Manual Available Budget
1	Senior Personnel	25,000.00	1,250.00	0.00	0.00	1,250.00	23,750.00	125	0.00	0.00	23,750.00
2	Other Personnel	0.00	0.00	0.00	0.00	0.00	0.00	0	0.00	0.00	0.00
3	Fringe Benefits	11,500.00	216.25	0.00	0.00	216.25	11,283.75	216	0.00	0.00	11,283.75
4	Equipment	5,000.00	7,656.00	0.00	0.00	7,656.00	-2,656.00	765	5,000.00	2,355.00	-11.00
5	Travel	0.00	0.00	0.00	0.00	0.00	0.00	0	0.00	0.00	0.00
6	Participant Costs	0.00	0.00	0.00	0.00	0.00	0.00	0	0.00	0.00	0.00
7	Other Direct Costs	1,300.00	38,000.00	0.00	0.00	38,000.00	-36,700.00	380	5,000.00	0.00	-31,700.00
8	Permission Required	0.00	0.00	0.00	0.00	0.00	0.00	0	0.00	0.00	0.00
9	Indirect Costs	18,144.00	18,943.80	0.00	0.00	18,943.80	-799.80	189	0.00	0.00	-799.80
	Totals =>	60,944.00	66,066.05	0.00	0.00	66,066.05	-5,122.05	660	10,000.00	2,355.00	2,522.95

At this point you can:

- ▪ *Add another scenario*
- ▪ *Delete the scenario*
- ▪ *Review other budget periods*

Note: This is viewable by other project team members but they cannot modify. If they wanted to make a change, they would need to create a different scenario.

Sponsored Award Management (SAM) tool

PROJECT SUMMARY REPORT

Click on **Project Summary Report**
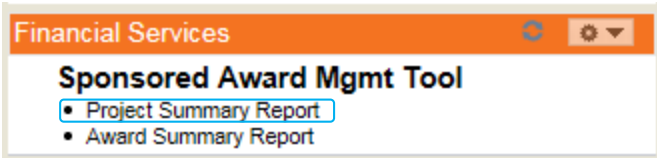
Any projects for which you have project or award level access, will appear on as a summary of all projects.

1. Filters: Enter a Value or click on the *magnifying glass* to select a value
2. Click the *search button* to poulate the Expense detail grid
3. All Links will allow you to drill down to the next level
4. *Grids* are exportable to Excel.
5. *General Tab* contains more demographic information.
6. *Calculations*:

> **Burn Rate:** *(-1) * Remaining Balance/Budgeted Amount + [(Period End date-As of date) / (Period end date-Period start Date)].*
>
> Note: Due to rounding, the % can be off by a couple of tenths of a percent
>
> **Average Monthly Burn Rate:** *Actual (expense) amount / [(As of Date – Period Start Date) /30]*
>
> **Remaining Months:** *(Period End Date – As of Date) / 30*
>
> **Percent Uncommitted:** *Uncommitted amount/ Budget x100*
>
> **Uncommitted Amount:** *Remaining - (Average monthly burn rate * remaining months)*

Sponsored Award Management (SAM) tool

1. Ability to drill down into project details
2. Burn rate calculations
3. Burn Rate can be calculated with or without commitments with the use of a check mark in the box
4. Burn Rate Indicator Legend

Expense Detail:

1. Forward funded: Although forward funded expenditures are reported, it is important to note that the budget is not included nor is it included in the available budget balance.
2. The page defaults to displaying activity directly charged to the awards (Project Expenditures tab). To view the cost share activity on your awards, click on the Cost Share Tab. To see both, click on the expander.
3. Click on budget category to drill down for more detail
4. Click on this link to limit by date range

Sponsored Award Management (SAM) tool

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Links to HR Appointment Info:

Note: This access is only available if you currently have payroll detail access to a project/award and HR access to appointment data.

Note: Payroll Summary Access:
- The link for Budget Category by Employee Summary will not be available
- When clicking on expended account code links, you will receive the message: "You are currently not authorized to access payroll detail information for this project."

Selected Budget Category Summary by Name - Expenses

Budget Category Senior Personnel   Current DateTime 04/08/15 2:09PM

The data on this report is based solely on the access of

Contract: Award PI: Department:

Sponsor: Primary Sponsor: Project Type:

Personalize | Find | View All | First 1-3 of 3 Last

Expended | Committed

	Expended Name▲	Expended Emplid	Expended Salary Summary	Expended Fringe Summary	Expended FandA Summary	Expended Total Summary
1	Name	Emplid	1,250.00	216.25	703.80	2,170.05
2	Name	Emplid	1,500.00	454.50	938.16	2,892.66
3		123456789	2,405.90	728.98	815.08	3,949.96

Clicking on emplid will bring you to HR Appt Data pages

Cancel

BC by Nmae - Exp | BC by Name - CS

PO inquiry link and Equipment tag detail:

Budget Category Summary by Name with Transaction Detail

Budget Category Equipment   Equipment   562124   Current DateTime 04/08/15 2:14PM
The data on this report is based solely on the access of

Project: Award PI: Department: Contract:
Sponsor: Primary Sponsor: Project Type:
  Name   Expended – Actual
        Search by Activity ID: Search

Personalize | Find | First 1-2 of 2 Last

	Journal Date	Fiscal Year	Journal ID	Journal Hdr Descr	Line Description	PO Number	Tag #1	Tag #2	Fund Code	Dept	Program	Account	Mycode	Project ID	Activity	Bud Ref	Amount
1	02/26/2015	2015		FAB	wtt-xy-ph2	N/A			13		00013	562124					4,471.000
2	02/26/2015	2015		fab equip	wtt-xy-ph1	N/A			13		00013	562124					3,185.000

if PO associated the PO ID will be visible and link will go to PO Inquiry

equipment tag #1 & 2

Total: 7,656.00

Cancel

Sponsored Award Management (SAM) tool

This Help Guide is to be used as a <u>starting</u> point. We encourage you to drill in to the links, use the filters, look at the data, and add a budget scenario.   This Help Guide along with a Detailed Navigation Guide and FAQs are available on the OSA website.

If you have any questions, comments, or need further assistance, please contact your Office of Sponsored Accounting Senior Accountant or Cathy Hayduke, Office of Sponsored Accounting, cphayduk@syr.edu, Phone: 443-1765