Navigate to Account Card Chart

Go to the page for the Principal Investigator (PI)

From the landing page: search or select the PI’s name

Or, from another root: click the PI list button and search or select the PI’s name

1. From the Root tab, click Charts, click Show on Account Cards

2. Click Accounts tab (all the Account Cards will be expanded and show a line graph)

Account Card Chart

General Rules

- Each point on the graph represents the next month; the dollar amounts are cumulative total costs
- First month on the graph is the last closed month
- Last month on the graph is 12 months from the last closed month (example: Oct 2019 – Oct 2020)

Sponsored Account

- Starting amount - Obligated Amount (allocation on the account from GMAS) less expenses as of the last closed month

- Funds Allocated includes:
  - Obligated Amount (allocation on the account from GMAS)
  - Projected personnel
    - costing based on PeopleSoft costing as of the last closed month
    - salary is from PeopleSoft
    - termination dates are from PeopleSoft (please note: we don’t pull in future termination dates)
  - Projected non-personnel
    - Uses run rate (the number of months used is from root tab \(\rightarrow\) projections \(\rightarrow\) run rate)
• **Projected Funds includes:**
  
  o Projected personnel expenses
    ▪ user entered costing distribution projection (if none are entered it will project the PeopleSoft costing distribution)
    ▪ user entered salary projection (if none are entered it will project the PeopleSoft salary)
    ▪ user entered termination date (if none are entered it will project the PeopleSoft termination date, please note we don’t pull in future termination dates)
    ▪ includes user entered personnel
  
  o Projected non-personnel expenses
    ▪ run rate (using the number of months entered on the projections tab for run rate)
    ▪ user entered projected costs
  
  o Projected funding (user entered)

• **The Account End** is the account end date from GMAS

- **Projections after the account end date** - The only expense to be projected after the account end date is the run rate.

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**Non-Sponsored Accounts**

• **Starting amount** - FY balance forward plus Income less expenses from the last month close.

• **Funds Allocated includes:**
  
  o FY Balance Forward plus Income less expenses (and projected expenses)
  
  o Projected personnel expenses
    ▪ costing based on PeopleSoft costing as of the last closed month
    ▪ salary is from PeopleSoft
    ▪ termination dates are from PeopleSoft (please note: we don’t pull in future termination dates)
  
  o Projected non-personnel expenses
    ▪ run rate (the number of months used is from root tab → projections → run rate)
Non-Sponsored Accounts (continued)

- Projected Funds include:
  - FY Balance Forward plus Income plus projected funding less expenses (and projected expenses)
  - Projected personnel expenses
    - user entered costing distribution projection (if none are entered it will project the PeopleSoft costing distribution)
    - user entered salary projection (if none are entered it will project the PeopleSoft salary)
    - user entered termination date (if none are entered it will project the PeopleSoft termination date, please note we don’t pull in future termination dates)
    - includes user entered personnel
  - Projected non-personnel expenses
    - run rate (the number of months used is from root tab ➔ projections ➔ run rate)
    - user entered projected costs
  - Projected funding (user entered)