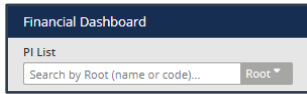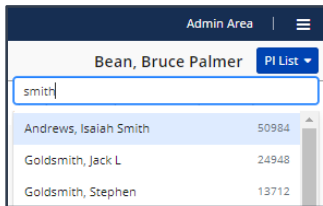## Navigate to Account Card Chart

Go to the page for the Principal Investigator (PI)
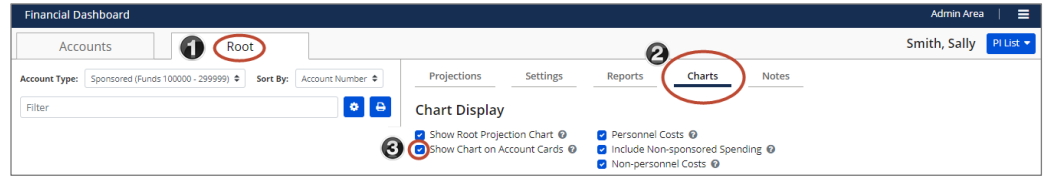
From the landing page:
search or select the PI's name

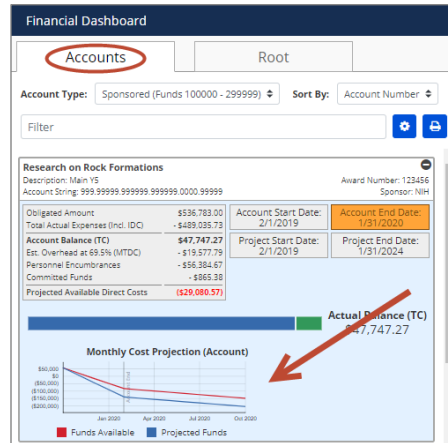### Or, from another root:
click the **PI list** button and search or select the PI's name

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

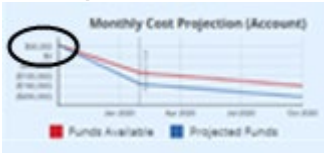2. Click **Accounts** tab (all the Account Cards will be expanded and show a line graph)

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:

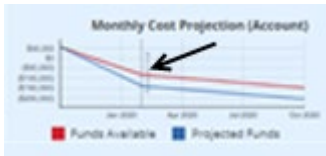 o Obligated Amount (allocation on the account from GMAS)
  o Projected personnel
    ▪ costing based on PeopleSoft costing as of the last closed month
    ▪ salary is from PeopleSoft
    ▪ termination dates are from PeopleSoft (please note: we don't pull in future termination dates)
  o Projected non-personnel
    ▪ Uses run rate (the number of months used is from root tab → projections → 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.

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:

  - o FY Balance Forward plus Income plus projected funding less expenses (and projected expenses)
  - 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 (the number of months used is from root tab → projections → run rate)
    - user entered projected costs
  - o Projected funding (user entered)