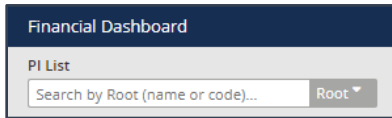## Navigate to Root Chart

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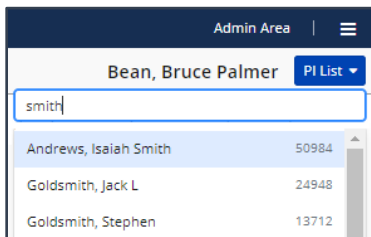
From the landing page:
search or select the PI's name
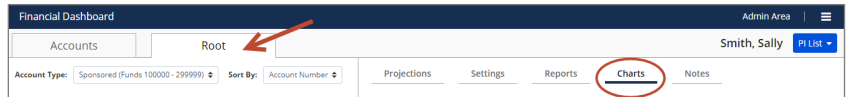

Or, from another root:
click the **PI list** button and search or select the PI's name

From the **Root** tab, click **Charts** to access the Root Chart

Root Chart

Root Chart

- Includes all sponsored and non-sponsored accounts for the root
  - sponsored accounts staring plot: allocated amount less the expenses for the last closed month
  - non-sponsored accounts starting plot: fiscal year budget forward plus income less expenses for the last closed month
- Each point on the graph represents a projected month; the amounts are **cumulative total costs**
- The starting month is the last closed month; the ending month is 12 months out
- Funds Available
  - Projects personnel using the costing distribution of the last closed month and salary from PeopleSoft
  - Projects non-personnel run rate (using the number of months entered on the projections tab for run rate)
- Projected Funds
  - Projects personnel
    - 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
  - Projects non-personnel
    - run rate (using the number of months entered on the projections tab for run rate)
    - user entered projected costs
  - Projects user entered projected funding
- In this chart the line has a steady slope after Feb 1, 2020. The latest end date for all the accounts is Jan 31, 2020, after that point the only projection which continues is the run rate.
- Check and uncheck the Personnel Costs, Non-personnel costs, and Include Non-sponsored Spending to see those selections dynamically reflected in the line chart

Chart Display

- ☑ Show Root Projection Chart ❓
- ☐ Show Chart on Account Cards ❓
- ☑ Personnel Costs ❓
- ☑ Include Non-sponsored Spending ❓
- ☑ Non-personnel Costs ❓

Monthly Cost Projection (Root)

Legend: ■ Funds Available   ■ Projected Funds