

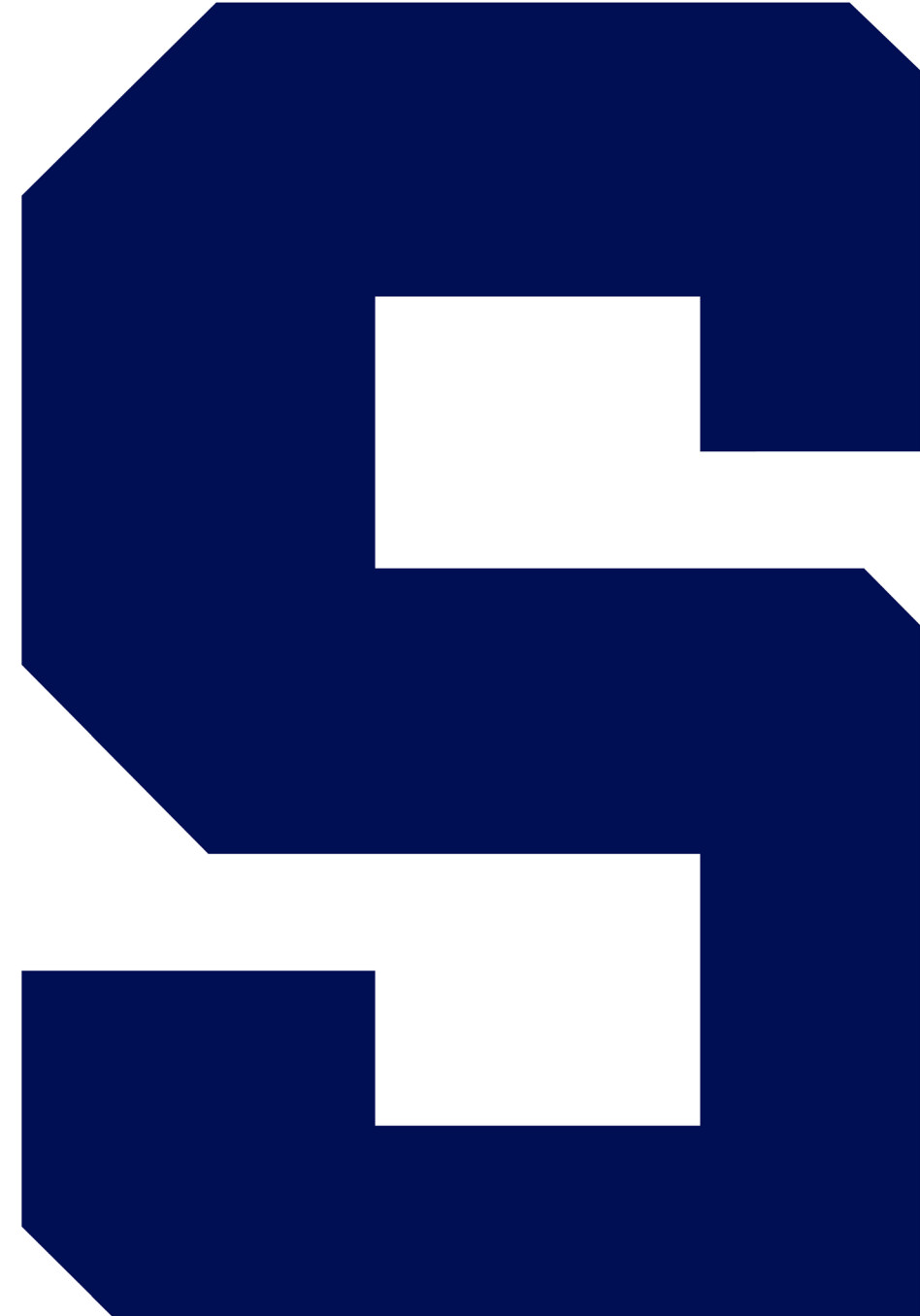
SAMtool and Other Resources

Office of Sponsored Accounting (OSA)

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Office of Research Awareness | April 6, 2022



What is SAMtool?

SAMtool – Sponsored Award Management Tool:

- Rolled out in Fall 2015
- Purpose
 - To provide a tool for financial and budget management of sponsored awards
- Access
 - For Principal Investigators access is automatically granted upon award set up in the PeopleSoft System
 - All other access is attained via a FAST request (PF92Camp) submitted by your departmental Information Coordinator. All access is based on your role and security access.
- On-going Enhancements

Features of the SAMtool

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 primary investigators (PIs), total sponsored budget, etc.
- at-a-glance summary views for PIs and administrators on awards for which they are responsible
- burn-rate indicators for potential over- or underspending on awards
- ability to drill down from summary data to multiple sublevels of summary data, and to the transaction level while also providing links to source documentation
- ability to categorize financial data to mirror OSP budget template categories, providing intuitive analysis throughout the award lifecycle
- enabling of PIs and administrators to create “what-if” scenarios for project planning, including commitments throughout the grant cycle
- provision of a clean, consistent and concise reporting tool for all sponsored awards
- reduction/elimination of the need for shadow systems

How Do I Access SAMtool?

One click access from MySlice

Click on Student-Faculty-Staff button

From Employee Home screen locate and click on Sponsored Award Mgmt Tool



Welcome to MySlice

STUDENT - FACULTY - STAFF

Parents, Proxy accounts, and users with a temporary NetID, use the login button below.

PARENT - PROXY - OTHER



Employee Home



Sponsored Award Mgmt Tool



Your Awards at a Glance

Award Summary

Contract Award PI Department Area

Sponsor Primary Project Type Award Status

Sponsor

Optional Filters

The data on this report is based solely on the access of Your Name Current DateTime 09/17/15 10:31AM

Sponsored Award Summary

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

Contract Number	Forward Funded Indicator	Title	Award PI	Begin Date	End Date	Budget	Expense	Commitments	Pre-Encumbrance	Balance	Total Billed	Total Payments Received
CON03397(1)	FF		PI Name			0.00	12,286.24	0.00	0.00	-12,286.24	0.00	0.00
CON03396(2)	N/A	Healthy Vending Choices	PI Name	07/01/2015	06/30/2016	1,202,292.00	1,275.87	300.22	0.00	1,200,715.91	0.00	0.00
CON03395(1)	N/A	Blues Music in the Office	PI Name	09/01/2014	08/31/2016	42,850.00	6,000.00	0.00	0.00	36,850.00	5,000.00	2,500.00

See Forward Funded details

View available balances at a glance

Drill into Award to view Project level, and Transaction level data

Award Count 3

Select Search to Retrieve Expense Data

[Award Summary - Date Search](#)

The data below is summarized based on your access and any filters selected at the top of the page.

Note: Forward Funded amounts are not included in the Budget and Available Balance.

Expense Detail

Personalize | Find | First 1-12 of 12 Last

Budget Category	Budget	Expends	Commits	Pre-Encumbered	Available Budget
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Burn Rate

Project Summary

Project ID Project PI Dept Area Project Status Search

Sponsor Primary Project Contract Clear

The data on this report is based solely on the access of Current DateTime 09/21/15 9:14AM

Burn Rate Indicator **Burn Rate Calculations**

Project ID	Forward Funded Indicator	Title	Project PI	Begin Date	End Date	Max Budget Period End Date	Budget	Expense	Commitments	Pre-Encumbrance	Balance	Over Under	IND	Budgeted Burn Rate	Actual Burn Rate	Allowable for Remainder
04024(1)	FF	FF Office Forced Air Flow		12/01/2014	10/31/2016		0.00	12,286.24	0.00	0.00	-12,286.24	0.00	▼	0.00	1297.84	-885.81
04023(1)	N/A	Beverage Choices in the Office		07/01/2015	06/30/2016		11,100.00	1,275.87	300.22	0.00	9,523.91	0.58	▼	912.33	531.61	1005.54
04022(1)	N/A	Snacks Choices in the Office		07/01/2015	06/30/2016		12,580.00	0.00	0.00	0.00	12,580.00	0.00	▼	1033.97	0.00	1287.62

Project Count 4 **Select Search to Retrieve Expense Data** [Project Summary - Date Search](#)

The data below is summarized based on your access and any filters selected at the top of the page.
Note: Forward Funded amounts are not included in the Budget and Available Balance.

Expense Detail

Project Expense	Cost Share	Budget Category	Budget	Expends	Commits	Pre-Encumber	Available Budget
1		Budget Category	0.00	0.00	0.00	0.00	0.00

Burn Rate Indicator Legend

☐ Burn Rate Includes Commitments

Burn Rate Indicator

- ▼ Potential Under Spending
- Average Rate Spending
- Potential Over Spending

Burn Rate can be calculated with or without commitments with the use of a check mark in the box

Ability to Capture F&A on Awards

Award Summary

Contract CON03396 Award PI Department Area Search
Sponsor Primary Project Type Award Status Clear

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

Sponsored Award Summary

Financial Details

Contract Number	Forward Funded Indicator	Title	Award PI	Begin Date	End Date	Budget	Expense	Commitments	Pre-Encumbrance	Balance	Total Billed	Total Payments Received
CON03396(2)	N/A	Healthy Vending Choices		07/01/2015	06/30/2016	1,202,292.00	1,275.87	300.22	0.00	1,200,715.91	0.00	0.00

Award Count 1 **Select Search to Retrieve Expense Data** [Award Summary - Date Search](#)

The data below is summarized based on your access and any filters selected at the top of the page.
Note: Forward Funded amounts are not included in the Budget and Available Balance.

Expense Detail

Project Expense Cost Share

	Budget Category	Budget	Expends	Commits	Pre-Encumbered	Available Budget
1	Other Personnel	154,996.00	935.00	220.00	0.00	153,841.00
2	Fringe Benefits	40,064.00	77.60	18.27	0.00	39,968.13
3	Total Salaries and Fringe	195,060.00	1,012.60	238.27	0.00	193,809.13
4	Equipment	12,000.00	0.00	0.00	0.00	12,000.00
5	Travel	32,201.00	0.00	0.00	0.00	32,201.00
6	Other Direct Costs	826,345.00	0.00	0.00	0.00	826,345.00
7	Total Direct Costs	1,065,606.00	1,012.60	238.27	0.00	1,064,355.13
8	Indirect Costs	136,686.00	263.27	61.95	0.00	136,360.78
9	Total Project Costs	1,202,292.00	1,275.87	300.22	0.00	1,200,715.91

Optional Filters:

- For a PI
- For a Particular Award
- For All Awards
- For an Area
- For a Department

Captured F&A on Awards

Build Your Budget Scenarios/Forecasting Tool

Create Adjustment Scenario

Exp by Bud Period

CS by Bud Period

Project Summary Detail by Period - Expenses

Current DateTime

User

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

Project:

Project PI

Project Dept:

Project Begin Date 07/01/2015

Project End Date 06/30/2016

Award:

Award PI:

Award Dept:

Award Begin Date 07/01/2015

Award End Date 06/30/2016

Forward Funded: NO

Sponsor:

Primary Sponsor:

Budget Period 1

Begin Date 07/01/2015

End Date 06/30/2016

Select current or future Budget Period to Create Adjustment

Select Scenario 0

Create Adjustment Scenario

Budget Scenarios / Forecasting

Contract Number > Project ID > Project Summary Detail by Period

Create Adjustment Scenario

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	12,788.00	0.00	0.00	0.00	0.00	12,788.00	0			
2 Other Personnel	28,000.00	0.00	0.00	0.00	0.00	28,000.00	0			
3 Fringe Benefits	4,536.00	0.00	0.00	0.00	0.00	4,536.00	0			
4 Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0			
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	144,750.00	0.00	0.00	0.00	0.00	144,750.00	0			
8 Permission Required	0.00	0.00	0.00	0.00	0.00	0.00	0			
9 Indirect Costs	42,139.00	0.00	0.00	0.00	0.00	42,139.00	0			
Totals =>	232,213.00	0.00	0.00	0.00	0.00	232,213.00	0			

Build Your Budget Scenarios/Forecasting Tool

Adjust Budget, Encumbered Expenses – Both Direct and Cost Share

Manual Adjmts

Manual Adjustments by Budget Period

Budget Period: 1 Begin Date: End Date:

Scenarios: Find | View All First 1 of 1 Last

Scenario: 1

Description: Need to add travel budget
Move budget from other costs to travel for conference.
Conference req already paid but has not processed through system yet.

Build your Budget Scenario / Forecasting Tool

Budget Category	Adjusted Budget Expense	Adjusted Encumbered Expense	Adjusted Budget Cost Share	Adjusted Encumbered Cost Share
1 Senior Personnel	0.00	0.00	0.00	0.00
2 Other Personnel	0.00	0.00	0.00	0.00
3 Fringe Benefits	0.00	0.00	0.00	0.00
4 Equipment	0.00	0.00	0.00	0.00
5 Travel	1500.00	500.00	0.00	0.00
6 Participant Costs	0.00	0.00	0.00	0.00
7 Other Direct Costs	-1500.00	0.00	0.00	0.00
8 Permission Required	0.00	0.00	0.00	0.00
9 Indirect Costs	0.00	0.00	0.00	0.00

Adjust Budget, Encumbered Expenses – Both Direct and Cost Share

Add Future Salary Commitments beyond one year past the current Fiscal year

Build Your Budget Scenarios/Forecasting Tool

Once a Scenario is Built

Add another scenario

Delete the scenario

Review other budget periods

Exp by Bud Period CS by Bud Period

Project Summary Detail by Period - Expenses

Other project team members can view budget scenarios but they cannot modify

Budget Period Begin Date 11/01/2015 End Date 05/19/2016 Select Scenario
Select current or future Budget Period to Create Adjustment

View your Built Budget Scenario

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	12,788.00	0.00	0.00	0.00	0.00	12,788.00	0	0.00	0.00	12,788.00
2 Other Personnel	28,000.00	0.00	0.00	0.00	0.00	28,000.00	0	0.00	0.00	28,000.00
3 Fringe Benefits	4,536.00	0.00	0.00	0.00	0.00	4,536.00	0	0.00	0.00	4,536.00
4 Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0	0.00	0.00	0.00
5 Travel	0.00	0.00	0.00	0.00	0.00	0.00	0	1,500.00	500.00	1,000.00
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	144,750.00	0.00	0.00	0.00	0.00	144,750.00	0	-1,500.00	0.00	143,250.00
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	42,139.00	0.00	0.00	0.00	0.00	42,139.00	0	0.00	0.00	42,139.00
Totals =>	232,213.00	0.00	0.00	0.00	0.00	232,213.00	0	0.00	500.00	231,713.00

Reflecting
your
Built
Scenario

Salary Summary by Employee

BC by Name - Exp BC by Name - CS

Selected Budget Category Summary by Name - Expenses

Budget Category Senior Personnel Current DateTime 03/02/15 4:22PM

The data on this report is based solely on

Contract: Department:

Sponsor: Project Type

Personalize | End | View All | First | 1-2 of 2 | Last

Expended Name	Expended Emplid	Expended Amount	Expended Fringe	Expended FandA	Expended Total
1 Name	Emplid	1,500.00	454.50	720.00	2,220.00
2 Name	Emplid	1,250.00	216.25	600.00	1,850.00

Names charged to the project for this category

Click on the Emplid to get Appointment data. Note: access is limited by your HR security

Participant Costs by Name

Expenses

Cost Share

Participant Costs Summary by Name - Expenses

Budget Category Participant Costs

Current 08/31/15 8:55AM
DateTime

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

Contract: Award PI: Department:
Sponsor: Primary Sponsor: Project Type:

Name:

Search

Enter the first few letters of a name (case sensitive) then Search. Names may be Last Name first and/or First Name first. Or enter the percent sign (%) to retrieve all names that match prior filters. *ExpendedName displays 'Online Entries - JE, ID, Misc.' until Search results are retrieved.

Expended

Committed

Personalize | Find | First 1 of 1 Last

	ExpendedName	Expenditure Summary	Expended FandA Summary	Expended Total Summary
1	Online Entries - JE, ID, Misc.	0.00	0.00	0.00

Helpful Hints

Budget Scenarios/Forecasting tool:

- Use the Budget Scenario/Forecasting tool for internal budget changes
- The OSP RA can review to determine if sponsor approval is needed for budget revisions
- PeopleSoft reflects only official sponsor budgets and sponsor approved revisions

Location of award documents and notes:

- Award documents can be found under the Award Brief column on the Details tab in the Sponsored Award Summary Box using the Award Summary Report
 - If there is N/A under Award Brief, please contact OSA via email at contact@syr.edu
- Award Notes can be found under the Award Notes column on the Details tab in the Sponsored Award Summary box using either the Project Summary Report or the Award Summary Report

SAMtool Enhancements in Progress

- Add an Expand icon under each Budget Category that allows display of each expense account and its total on the Expense Detail grid Project Expense tab and Cost Share tab on all pages that display the Expense Detail grid.
- Add Date to the filter selection on the Award Budget Category Summary Search – Expenses page in Award Summary and the Project Budget Category Summary Search – Expenses page in Project Summary.
- Add budget category sub totals to the Award Budget Category Summary Search – Expenses page in Award Summary and the Project Budget Category Summary Search – Expenses page in Project Summary.
- Add text to specify Month number/Month relationship on Award Budget Category Summary Search – Expenses page in Award Summary and the Project Budget Category Summary Search – Expenses page in Project Summary.
- Allow for ability to attach documents on the Manual Adjustments by Project and Manual Adjustments by Project Period pages in Project Summary.
- Add a blank budget period to the Project Summary Detail by Period page in Project Summary.

SAMtool Enhancements in Progress

- Add Project Summary Detail - Account, Project Summary Detail by Period-Account, Manual Adjustments by Project – Account and Manual Adjustments by Project Period - Account pages in Project Summary.
- Auto-calculate fringe and F&A amounts on all Manual Adjustments pages in Project Summary.
- Add MyCode filter to Award Summary and Project Summary.
- Add ability to search by multiple Accounts at transaction detail level.
- Add page that is a summary of Activities with corresponding fringe and F&A on Project Summary.
- Add pages that is a summary of Activities at Bud Ref level on Project Summary.
- Add person-months (burn rate on salary?) on Project Summary.
- Add field Service Date to transaction level detail.
- Ability to view Payment date on Award Summary.
- Add pages for Third Party cost share.

Your Sponsored Accounting Team for Financial Award Support

Please consult the OSA website for the OSA Representative who supports your School, College, Department, or Center.

- Cathy Hayduke, Director
- Toni Besaw, Assistant Director
- Liz Bull, Senior Accountant
- Kelly O'Connor, Senior Accountant
- Jane Hahn, Senior Accountant
- Kelly Moshier, Senior Accountant
- Ryan Taub, Accounting Analyst, Effort Certification
- Lori Mangano, Accounting Analyst, Award Set-ups
- Evan Diederich, Office Coordinator III
- Effort Reporting
- Office of Sponsored Accounting

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Questions,
Comments,
Suggestions?

