



New Reporting Tools for HR and Finance That Will Make Your Life Easier

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Agenda

- By the people, for the people
- A new approach for Finance reports
- An easy to use business report for business managers
- Report demo
- Other helpful resources
- Sneak preview of Expense Trends Analysis
- What's next?

UIC Reporting Committee

- Commissioned by Heather Haberaecker
- Subcommittee of the UIC OBFS Advisory Committee
- Tasked with addressing financial reporting gaps
- Co-Chairs:
 - Courtney Parzych, OBFS
 - Aaron Walz, Decision Support

UIC Reporting Committee

- Stephanie Adams OBFS – Univ Acct & Fin Reporting
- Ahlam Al-Kodmany Inst. for Health Research & Policy
- Arnim Dontes College of Medicine
- John Fudacz Department of Physics
- Mike Harner College of Medicine: Rockford
- Beth Ladd Decision Support
- Steve Sander Softech
- Bill Schmilke Dept. of Chemical Engineering
- Phil Weiss Vice Chancellor for Administration
- Ed Valentine Business Systems Users

A New Approach

- We've tried a number of things in the past with limited success
 - Committees
 - Surveys
 - Lots of talk and lots of good intentions
- Still reporting gaps after *years* of trying
- New committee
 - Committed to getting something done
 - Time for a new approach

A New Approach

- We didn't conduct a broad survey
 - Too many diverse needs
 - Too many problems to solve
 - No clear direction
- Committee has cross-section of areas and roles
 - They've already figured out what works
 - Ask them what problem to go after
 - Ask how they solve it themselves
- Target a specific audience and need and keep a tight focus

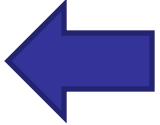
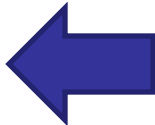
A New Approach

- Use prototypes rather than report specs to generate requirements
- Publish the results to the DS Solution Library
- Collaborate with OBFS on a Standard Report

Initial Focus: Business Mangers

- Define the audience and the need
- Easy to use
- Keep it simple, minimal accounting knowledge required (black is good, red is bad)
- One stop shopping
- Avoid overlap with existing standard reports

What are the basic tasks?

- Set up budgets
- Monitor expenses and encumbrances 
- ★ Manage my budget
- Reconcile accounts 
- Figure out anomalies

Report Overview

- Portfolio of reports as tabs in a single Business Objects report file
- Summary tab
 - One page summary
 - High level info, balances across fund types
- Additional tabs provide more information for each fund type

Report Overview

- State and ICR: **how much spent vs. left?**
 - by Fund, Account Type
 - by Fund, Program, Account Type
- Revolving: **are my funds breaking even?**
 - Cash
 - Revenue and Expenses
- Gifts: **what's coming in, going out?**
 - Cash
 - Revenue and Expenses

Report Overview

- Grants: how are my PIs doing?
 - Summary – inception to date
 - by PI
 - by PI, Fund
 - Burn Rates

Report Demo

Report Demo: Summary

Fin Func	Financial Fund Type Title(Summary)	Budget	Expenses this Month	Expenses Year To Date	Encumbrance YTD	Budget Balance Available(Su
1A	State Approp-GRF EAF IF	4,130,886.05	331,080.12	2,724,243.86	1,302,805.72	103,836.47
1B	PY State Approp-GRF EAF IF	0.00	0.00	-8,180.54	0.00	8,180.54
2A	Educational and Admin Allowances	4,440.39	0.00	0.00	0.00	4,440.39
2C	Institutional Costs Recovered	548,212.23	5,094.86	58,589.33	17,692.00	471,930.89
2E	Patents Copyrights and Royalties	9,241.40	0.00	0.00	0.00	9,241.40

Fin Fund	Financial Fund Type Title(Summr	Financial Fun	Financial Fund Title(Summary_Rev)	Fund Balance
3E	Service and Storeroom Activities	301902	949 ECE Departmental Revolving	6,000.00
3E				

3J	Aux Enterprises Not Under Indentur	301146	949 Lab Fees EE	99,638.01
	Aux Enterprises Not Under Indentur	301912	949 Industrial Trng and Collab Inst	12,050.32
3J				

3Q	Departmental Activities	301447	949 Rev IEEE Society	0.00
	Departmental Activities	301737	949 Bioelectromagnetics Society	4,671.82
	Departmental Activities	301771	949 Intern Symp on Neural Networks	0.00
	Departmental Activities	301849	949 Erricolo MURI Review	0.00
	Departmental Activities	301859	949 Dutta Northtrop Grumman	1,152.74
	Departmental Activities	301903	949 IEEE Trans on Neural Networks	2,256.69
	Departmental Activities	301921	949 Liu's Conference Revolving	5,902.25
3Q				

Report Demo: Summary

Fin Fur	Fin Fund Type Level 2 Title	Budget ITD	Expense ITD	Budget Less Expense	Encumbered YTD	Budget Less Exp Less Enc
4A	Sponsored Prog-US Gov G & C	11,202,954.00	6,412,942.61	4,790,011.39	1,308,917.09	3,481,094.30
4E	Sponsored Prog-Private G & C	5,942,865.60	5,550,213.60	392,652.00	3,007.50	389,644.50

Fin Fund Ty	Financial Fund Type Title(Sum)	Financial Fu	Financial Fund Title(Summary_Gift)	Fund Balance
4M	Trust-Private Gifts	621371	949 Shenai Research	73,837.62
	Trust-Private Gifts	621584	949 GIF EECS Var Scholar	16,891.97
	Trust-Private Gifts	622376	949 UIF EECS Unres	1,049.84
	Trust-Private Gifts	622423	949 UIC Aileen S. Andrew Fund	22,062.09
	Trust-Private Gifts	622618	949 UIF Agarwal Fdtn	698.58
	Trust-Private Gifts	622645	949 UIF Lin Research	829.51
	Trust-Private Gifts	622842	949 Elec Comp Engr Unres	137,998.31
	Trust-Private Gifts	627514	949 FY05 CRB Ghosh	0.00
	Trust-Private Gifts	627821	949 Mazumder ENGR RSCH	0.00
	Trust-Private Gifts	628362	949 Priemer Engr Rsch	456.77
	Trust-Private Gifts	628456	949 Derong Liu Engr Rsch	0.00
	Trust-Private Gifts	628852	949 Hill Professorship - Stroschio	7,627.29
	Trust-Private Gifts	628869	949 Univ Scholar Uslenghi	11,552.58
	Trust-Private Gifts	628872	949 Univ Scholar Liu	0.00
	Trust-Private Gifts	628913	949 SCHONFELD ENGR RSCH	16,508.05
	Trust-Private Gifts	628978	949 Dutta - Graduate Resrch Project	36,639.87
	Trust-Private Gifts	629002	949 Khokhar Engr Rsch	4,120.43
	Trust-Private Gifts	629032	949 David Yang Engr Rsch	2,953.11
	Trust-Private Gifts	629044	949 Univ Scholar Lee	10,753.96
	Trust-Private Gifts	629048	949 UIC Stroschio Engr Rsch	0.00
	Trust-Private Gifts	629174	949 DUTTA ENG RSCH - RED CELL SOLAR	279.73
	Trust-Private Gifts	629223	949 UIC Oliver Yu Engr Research	8,758.11
4M				

Report Demo: State/ICR

Financial Fund Code	Financial Fund Title(Detail_State/ICR)	Fin Account Ty	Fin Account Type Title(Detail)	Operating Budget	Expense Period Tot	YTD Expense(Detail)	YTD Encumbrance	Budget Balance Available
100009	103 FY09 GRF/AF General Funds	10	Expense Budget Pool	0.00	0.00	0.00	0.00	0.00
	103 FY09 GRF/AF General Funds	20	Academic Salary	0.00	0.00	-8,967.17	0.00	8,967.17
	103 FY09 GRF/AF General Funds	21	Assistant Salary	0.00	0.00	786.63	0.00	-786.63
	103 FY09 GRF/AF General Funds	22	Staff Salary	0.00	0.00	0.00	0.00	0.00
	103 FY09 GRF/AF General Funds	23	Wages	0.00	0.00	0.00	0.00	0.00
100009			Sum:	0.00	0.00	-8,180.54	0.00	8,180.54

100010	103 FY10 GRF/AF General Funds	12	Materials and Supplies	13,396.00	0.00	1,697.38	0.00	11,698.62
	103 FY10 GRF/AF General Funds	13	Transportation Services	4,819.00	0.00	0.00	0.00	4,819.00
	103 FY10 GRF/AF General Funds	14	Services	-55,647.00	3,748.84	30,023.34	0.00	-85,670.34
	103 FY10 GRF/AF General Funds	16	Equipment/Software/Capital Lea	4,150.00	0.00	0.00	0.00	4,150.00
	103 FY10 GRF/AF General Funds	18	Miscellaneous	0.00	2,556.23	2,556.23	0.00	-2,556.23
	103 FY10 GRF/AF General Funds	20	Academic Salary	3,415,808.05	262,114.03	2,238,057.06	1,081,442.73	96,308.26
	103 FY10 GRF/AF General Funds	21	Assistant Salary	451,363.00	42,322.28	295,927.85	124,352.34	31,082.81
	103 FY10 GRF/AF General Funds	22	Staff Salary	275,043.00	18,837.01	148,812.57	97,010.65	29,219.78
	103 FY10 GRF/AF General Funds	23	Wages	21,954.00	1,501.73	7,306.05	0.00	14,647.95
	103 FY10 GRF/AF General Funds	25	Benefit Costs	0.00	0.00	-136.62	0.00	136.62
100010			Sum:	4,130,886.05	331,080.12	2,724,243.86	1,302,805.72	103,836.47

200200	103 Educational and Admin Allowance	10	Expense Budget Pool	4,316.95	0.00	0.00	0.00	4,316.95
	103 Educational and Admin Allowance	12	Materials and Supplies	123.44	0.00	0.00	0.00	123.44
200200			Sum:	4,440.39	0.00	0.00	0.00	4,440.39

Report Demo: State/ICR

Financial	Financial Fund Title(S	Financial	Financial Program Title(Fin A	Fin Account Type Title(S	Operating Budget(Expense Period To(YTD Expense(State)	YTD Encumbrance(Budget Balance Ava
100009	103 FY09 GRF/AF Gene	284003	SOF Engr Adm	10	Expense Budget Pool	77.00	0.00	0.00	0.00	77.00
		284003			Sum:	77.00	0.00	0.00	0.00	77.00
	103 FY09 GRF/AF Gene	949001	SOF ECE Pri Fun Educ	10	Expense Budget Pool	11,106.44	0.00	0.00	0.00	11,106.44
	103 FY09 GRF/AF Gene		SOF ECE Pri Fun Educ	20	Academic Salary	0.00	0.00	-8,967.17	0.00	8,967.17
	103 FY09 GRF/AF Gene		SOF ECE Pri Fun Educ	21	Assistant Salary	0.00	0.00	0.00	0.00	0.00
	103 FY09 GRF/AF Gene		SOF ECE Pri Fun Educ	22	Staff Salary	0.00	0.00	0.00	0.00	0.00
	103 FY09 GRF/AF Gene		SOF ECE Pri Fun Educ	23	Wages	0.00	0.00	0.00	0.00	0.00
		949001			Sum:	11,106.44	0.00	-8,967.17	0.00	20,073.61
	103 FY09 GRF/AF Gene	949002	SSU ECE Pri Func Edu	10	Expense Budget Pool	\$-11,183.44	0.00	0.00	0.00	-11,183.44
	103 FY09 GRF/AF Gene		SSU ECE Pri Func Edu	20	Academic Salary	0.00	0.00	0.00	0.00	0.00
	103 FY09 GRF/AF Gene		SSU ECE Pri Func Edu	21	Assistant Salary	0.00	0.00	786.63	0.00	-786.63
		949002			Sum:	\$-11,183.44	0.00	786.63	0.00	-11,970.07
100009					Sum:	0.00	0.00	-8,180.54	0.00	8,180.54

100010	103 FY10 GRF/AF Gene	949001	SOF ECE Pri Fun Educ	12	Materials and Supplies	13,396.00	0.00	1,697.38	0.00	11,698.62
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	13	Transportation Services	4,819.00	0.00	0.00	0.00	4,819.00
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	14	Services	\$-55,647.00	3,748.84	30,023.34	0.00	-85,670.34
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	16	Equipment/Software/Capit	4,150.00	0.00	0.00	0.00	4,150.00
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	18	Miscellaneous	0.00	2,556.23	2,556.23	0.00	-2,556.23
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	20	Academic Salary	3,415,808.05	262,114.03	2,193,025.71	1,081,442.73	141,339.61
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	21	Assistant Salary	451,363.00	42,322.28	287,225.71	124,352.34	39,784.95
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	22	Staff Salary	275,043.00	18,837.01	148,812.57	97,010.65	29,219.78
	103 FY10 GRF/AF Gene		SOF ECE Pri Fun Educ	23	Wages	21,954.00	1,501.73	7,306.05	0.00	14,647.95
		949001			Sum:	4,130,886.05	331,080.12	2,670,646.99	1,302,805.72	157,433.34

Report Demo: Revolving (cash)

Financial Fund Code	Financial Fund Title(Rev_Cash)	Fin Account Type Title(Rev_Cash)	GL Summa	Cash In	Cash Out	Cash Balance
301146	949 Lab Fees EE	Cash and Cash Equivalents	00	64,212.82	123.26	64,089.56
	949 Lab Fees EE	Cash and Cash Equivalents	01	900.00	12,070.00	-11,170.00
	949 Lab Fees EE	Cash and Cash Equivalents	02	99,334.00	73,360.37	25,973.63
	949 Lab Fees EE	Cash and Cash Equivalents	03	22,297.00	16,145.05	6,151.95
	949 Lab Fees EE	Cash and Cash Equivalents	04	3,575.41	2,349.35	1,226.06
	949 Lab Fees EE	Cash and Cash Equivalents	05	1,220.00	738.73	481.27
	949 Lab Fees EE	Cash and Cash Equivalents	06	1,950.00	3,915.82	-1,965.82
	949 Lab Fees EE	Cash and Cash Equivalents	07	95,262.00	75,805.76	19,456.24
	949 Lab Fees EE	Cash and Cash Equivalents	08	14,712.64	20,602.84	-5,890.20
	949 Lab Fees EE	Cash and Cash Equivalents	09	6,437.00	4,432.38	2,004.62
301146			Sum:	309,900.87	209,543.56	100,357.31
301447	949 Rev IEEE Society	Cash and Cash Equivalents	00	0.00	0.00	0.00
301447			Sum:	0.00	0.00	0.00

Report Demo: Revolving (rev/exp)

Financial Fund Code	Financial Fund Title(Rev_Rev)	Fin Account Type C	Fin Account Type Ti	YTD Revenue(Rev_)	YTD Expense(Rev_)	YTD Encumbrance(YTD Rev less Exp les
300011	103 Payroll Suspense - Departm	20	Academic Salary		0.00	0.00	0.00
	103 Payroll Suspense - Departm	21	Assistant Salary		0.00	0.00	0.00
300011					0.00	0.00	0.00

301146	949 Lab Fees EE	12	Materials and Supplie:		24,256.84	8,376.18	-32,633.02
	949 Lab Fees EE	14	Services		5,764.74	7,273.10	-13,037.84
	949 Lab Fees EE	1C	Allowances		39.00	0.00	-39.00
	949 Lab Fees EE	34	Investment Income	262.25		0.00	262.25
	949 Lab Fees EE	35	Sales/Services	67,800.00		0.00	67,800.00
301146				68,062.25	30,060.58	15,649.28	22,352.39

301345	284 Rev Eng Offcampus T	13	Transportation Servic		0.00	0.00	0.00
	284 Rev Eng Offcampus T	14	Services		0.00	0.00	0.00
	284 Rev Eng Offcampus T	20	Academic Salary		0.00	0.00	0.00
	284 Rev Eng Offcampus T	35	Sales/Services	0.00		0.00	0.00
301345				0.00	0.00	0.00	0.00

301447	949 Rev IEEE Society	12	Materials and Supplie:		0.00	0.00	0.00
	949 Rev IEEE Society	35	Sales/Services	0.00		0.00	0.00
301447				0.00	0.00	0.00	0.00

Report Demo: Gifts

Financial Fund	Financial Fund Title(Detail_Gift)	Fin Account Type Title(Detail_Gift)	GL Su	Cash In	Cash Out	Cash Balance
621371	949 Shenai Research	Cash and Cash Equivalents	00	73,837.62	0.00	73,837.62
621371			Sum:	73,837.62	0.00	73,837.62

621584	949 GIF EECS Var Scholar	Cash and Cash Equivalents	00	14,519.28	0.00	14,519.28
	949 GIF EECS Var Scholar	Cash and Cash Equivalents	02	243.75	0.00	243.75
	949 GIF EECS Var Scholar	Cash and Cash Equivalents	06	4,000.00	0.00	4,000.00
	949 GIF EECS Var Scholar	Cash and Cash Equivalents	07	0.00	1,871.06	-1,871.06
	949 GIF EECS Var Scholar	Cash and Cash Equivalents	08	46.86	46.86	0.00
621584			Sum:	18,809.89	1,917.92	16,891.97

622376	949 UIF EECS Unres	Cash and Cash Equivalents	00	1,049.84	0.00	1,049.84
622376			Sum:	1,049.84	0.00	1,049.84

622423	949 UIC Aileen S. Andrew Fund	Cash and Cash Equivalents	00	23,604.17	0.00	23,604.17
	949 UIC Aileen S. Andrew Fund	Cash and Cash Equivalents	01	0.00	42.08	-42.08
	949 UIC Aileen S. Andrew Fund	Cash and Cash Equivalents	04	0.00	2,010.04	-2,010.04
	949 UIC Aileen S. Andrew Fund	Cash and Cash Equivalents	06	2,010.04	0.00	2,010.04
622423			Sum:	25,614.21	2,052.12	23,562.09

622618	949 UIF Agarwal Fdtn	Cash and Cash Equivalents	00	698.58	0.00	698.58
622618			Sum:	698.58	0.00	698.58

Report Demo: Gifts

Financial Fund	Financial Fund Title(Gift_RevE)	Fin Account Type	Fin Account Type Title(Gift_RevE)	YTD Revenue(Gi	YTD Expense(G	YTD Encumb	YTD Rev less Exp le
621371	949 Shenai Research	10	Expense Budget Pool		0.00	0.00	0.00
621371			Sum:		0.00	0.00	0.00

621584	949 GIF EECS Var Scholar	10	Expense Budget Pool		0.00	0.00	0.00
	949 GIF EECS Var Scholar	12	Materials and Supplies		1,871.06	0.00	-1,871.06
	949 GIF EECS Var Scholar	33	Sponsored Programs	4,243.75		0.00	4,243.75
621584			Sum:	4,243.75	1,871.06	0.00	2,372.69

622376	949 UIF EECS Unres	10	Expense Budget Pool		0.00	0.00	0.00
622376			Sum:		0.00	0.00	0.00

622423	949 UIC Aileen S. Andrew Fund	10	Expense Budget Pool		0.00	0.00	0.00
	949 UIC Aileen S. Andrew Fund	12	Materials and Supplies		0.00	0.00	0.00
	949 UIC Aileen S. Andrew Fund	14	Services		42.08	0.00	-42.08
	949 UIC Aileen S. Andrew Fund	16	Equipment/Software/Capital Lease		0.00	4,527.95	-4,527.95
622423			Sum:		42.08	4,527.95	-4,570.03

622618	949 UIF Agarwal Fdtn	10	Expense Budget Pool		0.00	0.00	0.00
622618			Sum:		0.00	0.00	0.00

622645	949 UIF Lin Research	10	Expense Budget Pool		0.00	0.00	0.00
	949 UIF Lin Research	14	Services		0.00	0.00	0.00

Report Demo: Grants

Fin Fur	Fin Fund Type Level 2 Title	Principal Investigator Name(S)	Budget ITD	Expense ITD	Budget Less Expense	Encumbered YTD B	Budget Less Exp Less Enc
4A	Sponsored Prog-US Gov G & C	Dutt, Shantanu S	250,000.00	75,525.22	174,474.78	0.00	174,474.78
	Sponsored Prog-US Gov G & C	Erricolo, Danilo	5,500,000.00	4,068,182.81	1,431,817.19	1,128,675.00	303,142.19
	Sponsored Prog-US Gov G & C	Ghosh, Siddhartha	120,398.00	114,967.32	5,430.68	0.00	5,430.68
	Sponsored Prog-US Gov G & C	Khokhar, Ashfaq	799,391.00	367,316.07	432,074.93	26,526.82	405,548.11
	Sponsored Prog-US Gov G & C	Mazumder, Sudip	1,238,789.00	434,757.62	804,031.38	57,130.18	746,901.20
	Sponsored Prog-US Gov G & C	Metlushko, Vitali V	341,018.00	103,759.77	237,258.23	9,022.62	228,235.61
	Sponsored Prog-US Gov G & C	Schonfeld, Dan	232,496.00	81,487.30	151,008.70	8,774.84	142,233.86
	Sponsored Prog-US Gov G & C	Stroscio, Michael	566,049.00	337,048.97	229,000.03	30,373.68	198,626.35
	Sponsored Prog-US Gov G & C	Tuninetti, Daniela	325,251.00	210,995.92	114,255.08	0.00	114,255.08
	Sponsored Prog-US Gov G & C	Wu, Kaijie	341,734.00	100,649.19	241,084.81	8,823.97	232,260.84
	Sponsored Prog-US Gov G & C	Zefran, Milos	1,020,940.00	309,846.33	711,093.67	30,567.36	680,526.31
	Sponsored Prog-US Gov G & C	Zhu, Zhichun	466,888.00	208,406.09	258,481.91	9,022.62	249,459.29
4A		Sum:	11,202,954.00	Sum:	4,790,011.39	Sum:	3,481,094.30
4E	Sponsored Prog-Private G & C	Banerjee, Prithviraj	100,000.00	79,312.93	20,687.07	0.00	20,687.07
	Sponsored Prog-Private G & C	Cetinkunt, Sabri	5,842,865.60	5,470,900.67	371,964.93	3,007.50	368,957.43
	Sponsored Prog-Private G & C	Dutta, Mitra	0.00	0.00	0.00	0.00	0.00
4E		Sum:	5,942,865.60	Sum:	392,652.00	Sum:	389,644.50
		Sum:	17,145,819.60	Sum:	5,182,663.39	Sum:	3,870,738.80

Report Demo: Grants by PI

Principal Investigator Name(GrantsbyPI)	Grant Code(Grants byPI)	Grant Long Title(GrantsbyPI)	Grant Start Date(GrantsbyPI)	Grant End Date(Grants byPI)	Sponsor Name(GrantsbyPI)	Budg Expense Only ITD Bal(GrantsbyP	Expense ITD Balance(GrantsbyPI)	Budget less Exp	encumbered YTD Balance(Grants byPI)	Budget Less Exp Less Enc
Banerjee, Prithviraj	G7234	A Hardware Software	7/1/2006	8/15/2010	Intel Corp	100,000.00	79,312.93	20,687.07	0.00	20,687.07
Banerjee, Prithviraj										
Cetinkunt, Sabri	G8526	MANUFACTURING R	2/7/2000	7/31/2011	Manufacturing Research Cen	5,842,865.60	5,470,900.67	371,964.93	3,007.50	368,957.43
Cetinkunt, Sabri										
Dutta, Mitra	G5781	Nanotechnology enha	2/1/2010	8/31/2010		0.00	0.00	0.00	0.00	0.00
Dutta, Mitra										
Dutt, Shantanu S	E5436	Algorithms of Simulta	8/1/2008	7/31/2010	US National Science Founda	250,000.00	75,525.22	174,474.78	0.00	174,474.78
Dutt, Shantanu S										
Erricolo, Danilo	E6926	Muri Adaptive Wavefr	7/1/2005	6/30/2010	Air Force Office of Scientific F	5,500,000.00	4,068,182.81	1,431,817.19	1,128,675.00	303,142.19
Erricolo, Danilo										
Ghosh, Siddhartha	E5223	Epitaxial Multiferroics	10/1/2008	9/30/2011	Office of Naval Research (ON	120,398.00	114,967.32	5,430.68	0.00	5,430.68
Ghosh, Siddhartha										
Khokhar, Ashfaq	E4889	NeTS Large Collabora	9/1/2009	8/31/2013	US National Science Founda	339,923.00	25,893.64	314,029.36	13,409.92	300,619.44
	E6223	Motion Search Motion	8/15/2006	7/31/2010	US National Science Founda	459,468.00	341,422.43	118,045.57	13,116.90	104,928.67
Khokhar, Ashfaq										
Mazumder, Sudip	E4669	Universal Programmal	6/29/2009	4/30/2010	Intelligent Automation Inc	21,000.00	8,901.78	12,098.22	0.00	12,098.22
	E4796	Development of an Ac	7/15/2009	4/14/2010	Genesic Semiconductor Inc	50,000.00	35,039.28	14,960.72	11,135.05	3,825.67
	E5192	Optically-triggered Hy	11/1/2008	12/1/2010	Office of Naval Research (ON	209,144.00	197,739.39	11,404.61	9,365.05	2,039.56
	E5219	Optically-Gated High-I	11/1/2008	8/14/2010	Genesic Semiconductor Inc	374,999.00	170,363.79	204,635.21	21,417.55	183,217.66
	E5385	Bipolar Power Transis	8/15/2008	7/31/2011	US National Science Founda	307,646.00	0.00	307,646.00	1,570.00	306,076.00
	E5617	Hybrid Modulation bas	8/15/2007	7/31/2010	US National Science Founda	276,000.00	22,713.38	253,286.62	13,642.53	239,644.09
Mazumder, Sudip										

Report Demo: Grants by PI

Khokhar, Ashfaq

Grant Code(PI_Gra	Grant Long Title(PI_GrantFu	Grant StartDate(PI_	Grant EndDate(PI_G	Sponsor Name(PI_	Fund Code(PI_Gran	Perm OrigBudg Exp	Expense ITDBalanc	Encumbered YTD B:	
E4889	NeTS Large Collaborative Rese	9/1/2009	8/31/2013	US National Science	491364	12,196.00	0.00	0.00	12,196.00
	NeTS Large Collaborative Rese	9/1/2009	8/31/2013	US National Science	491365	28,572.00	0.00	0.00	28,572.00
	NeTS Large Collaborative Rese	9/1/2009	8/31/2013	US National Science	491381	299,155.00	25,893.64	13,409.92	259,851.44
E4889					Sum:	339,923.00	25,893.64	13,409.92	300,619.44

E6223	Motion Search Motion Tajejectory	8/15/2006	7/31/2010	US National Science	492166	12,000.00	2,100.49	0.00	9,899.51
	Motion Search Motion Tajejectory	8/15/2006	7/31/2010	US National Science	493253	37,468.00	20,689.24	0.00	16,778.76
	Motion Search Motion Tajejectory	8/15/2006	7/31/2010	US National Science	493882	410,000.00	318,632.70	13,116.90	78,250.40
E6223					Sum:	459,468.00	341,422.43	13,116.90	104,928.67

					Sum:	799,391.00	367,316.07	26,526.82	405,548.11
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Mazumder, Sudip

Grant Code(PI_Gra	Grant Long Title(PI_GrantFu	Grant StartDate(PI_	Grant EndDate(PI_G	Sponsor Name(PI_	Fund Code(PI_Gran	Perm OrigBudg Exp	Expense ITDBalanc	Encumbered YTD B:	
E4669	Universal Programmable and Af	6/29/2009	4/30/2010	Intelligent Automation	491078	21,000.00	8,901.78	0.00	12,098.22
E4669					Sum:	21,000.00	8,901.78	0.00	12,098.22

E4796	Development of an Acceleratec	7/15/2009	4/14/2010	Genesic Semiconduct	491246	50,000.00	35,039.28	11,135.05	3,825.67
E4796					Sum:	50,000.00	35,039.28	11,135.05	3,825.67

Report Demo: Grants burn rates

Grant PI	Grant C	Grant Title	Grant Start - End Date	Grant Sponsor Name	Months-To-Date	Total Months	% Time Complete	ITD Direct Expense \$	ITD FandA Expense \$	ITD Budget \$	% Budget Spent	Difference
Banerjee, Prithviraj	G7234	A Hardware Software Codesig	07/01/2006 -- 08/15/2010	Intel Corp	45	50	90 %	\$43,238	\$36,074	\$100,000	79 %	11 %
Banerjee, Prithviraj												
Cetinkunt, Sabri	G8526	MANUFACTURING RESEARCI	02/07/2000 -- 07/31/2011	Manufacturing Research Cer	122	138	88 %	\$5,463,449	\$7,452	\$5,842,866	94 %	-5 %
Cetinkunt, Sabri												
Dutt, Shantanu S	E5436	Algorithms of Simultaneous Ex	08/01/2008 -- 07/31/2010	US National Science Founde	20	24	83 %	\$44,091	\$31,435	\$250,000	30 %	53 %
Dutt, Shantanu S												
Erricolo, Danilo	E6926	Muri Adaptive Waveform Desig	07/01/2005 -- 06/30/2010	Air Force Office of Scientific I	57	60	95 %	\$3,794,387	\$273,796	\$5,500,000	74 %	21 %
Erricolo, Danilo												
Ghosh, Siddhartha	E5223	Epitaxial Multiferroics on GaN f	10/01/2008 -- 09/30/2011	Office of Naval Research (OI	18	36	50 %	\$64,859	\$30,109	\$120,398	95 %	-45 %
Ghosh, Siddhartha												
Khokhar, Ashfaq	E4889	NeTS Large Collaborative Rese	09/01/2009 -- 08/31/2013	US National Science Founde	7	48	15 %	\$13,126	\$12,768	\$339,923	8 %	7 %
	E6223	Motion Search Motion Tajejor	08/15/2006 -- 07/31/2010	US National Science Founde	44	48	92 %	\$209,587	\$131,836	\$459,468	74 %	17 %
Khokhar, Ashfaq												
Mazumder, Sudip	E4669	Universal Programmable and A	06/29/2009 -- 04/30/2010	Intelligent Automation Inc	10	11	91 %	\$5,670	\$3,232	\$21,000	42 %	49 %
	E4796	Development of an Accelerate	07/15/2009 -- 04/14/2010	Genesic Semiconductor Inc	9	10	90 %	\$22,318	\$12,721	\$50,000	70 %	20 %
	E5192	Optically-triggered Hybrid SiC I	11/01/2008 -- 12/01/2010	Office of Naval Research (OI	17	26	65 %	\$125,949	\$71,791	\$209,144	95 %	-29 %
	E5219	Optically-Gated High-Power Sc	11/01/2008 -- 08/14/2010	Genesic Semiconductor Inc	17	22	77 %	\$121,142	\$49,222	\$374,999	45 %	32 %
	E5385	Bipolar Power Transistor	08/15/2008 -- 07/31/2011	US National Science Founde	20	36	56 %	\$0	\$0	\$307,646	0 %	56 %
	E5617	Hybrid Modulation based High	08/15/2007 -- 07/31/2010	US National Science Founde	32	36	89 %	\$13,558	\$9,156	\$276,000	8 %	81 %
Mazumder, Sudip												
Metlushko, Vitali V	E5396	The Challenge of Integrating M	08/15/2008 -- 07/31/2011	US National Science Founde	20	36	56 %	\$60,348	\$43,412	\$341,018	30 %	25 %
Metlushko, Vitali V												

Other Helpful Resources

- Decision Support Solution Library
 - <http://www.ds.uillinois.edu/web/Home/SolLib.aspx>

The screenshot shows the Decision Support Solution Library website. At the top, there is a navigation bar with links: Create Reports, View Reports, Download Data, Get Help, Get Access, About Data, DW Changes, Benefit, and AboutDS. Below this is a header section with 'DECISION SUPPORT' in the center, 'DS Home | EDDIE | Contact | Search' on the right, and 'Solution Library' on the left. The main content area is titled 'SOLUTION LIBRARY' and contains a paragraph: 'The Decision Support Solution Library provides step-by-step instructions for many common reporting needs. Each reporting solution contains:' followed by a bulleted list: 'A sample report', 'Detailed instructions on how to open, modify, and save the report', 'Business concepts and data rules associated with the report', and 'Helpful links to additional Business Objects, Universe, and security information.' Below this is a section titled '❖ Employees' with a bulleted list: 'Employee Attributes' (with sub-links: Employee Mailing Address Labels, Employee Work Mailing Labels, Faculty Tenure Track Information, Non-Terminated Employees with No Active Jobs), 'HR Front End' (with sub-links: HRFE Security, HRFE Transactions), and 'Position/Job Attributes' (with sub-links: Current Job Listing, Current Position Listing, Employee Class (E-Class) Listing, Employee Job/Job Detail Listing). On the right side, there is a 'Quick Links' section with links: Query Clearinghouse, Universe Information, Solution Library Home, General Info, and BO How To & Tips. The left sidebar has 'Solution Library' and 'Solution Library Home' links.

Sneak Preview: Expense Analysis

- Budgets are tight!
- People need to know where the money is going
- Reports are great for reviewing transaction details and basic summaries
- But is that enough?

Sneak Preview: Expense Analysis

- Decision makers at all levels need more
- Analyze trends in spending, explore spending patterns, identifying areas of higher or lower spending
- Both summary information and ability to easily drill into details *in the same tool*

Sneak Preview: Expense Analysis

- Slice expenses by:
 - Where is the money coming from? (e.g. State funds or Sponsored Research funds)
 - What are we spending it on? (e.g. Personnel vs. Equipment)
 - What purchase methods are we using? (e.g. P-Card vs. iBuy vs. Banner purchase order)
 - Who is the money is being spent with? (i.e. Vendor)

Sneak Preview: Expense Analysis

- How do we do this today?
- Ask a question, assign local staff (if possible) or request help from OBFS or Decision Support
- However, one question leads to another question, which leads to another question
- Each question is a one-off query or report
 - highly manual and inefficient
 - can takes weeks or longer
 - static reports provide very poor support for a more dynamic kind of analysis

Sneak Preview: Expense Analysis

- Decision Support is in the process of building an OLAP* cube to support Expense Trends Analysis
- Ask an expense question and let's see where it leads...

* On-Line Analytical Processing

What's Next?

- Finalize development efforts for Business Managers' report
- Next focus area: similar report for PIs

Questions?

- Thank you!
- We're here to help...

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