SAMtool and Other Resources

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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
Your Awards at a Glance

See Forward Funded details
Drill into Award to view Project level, and Transaction level data
View available balances at a glance

The data on this report is based solely on the access of your Name.
Burn Rate

Burn Rate Indicator Legend

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

Burn Rate Indicator

Burn Rate Calculations

The data on this report is based solely on the access of...
Ability to Capture F&A on Awards

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
# Build Your Budget Scenarios/Forecasting Tool

Adjust Budget, Encumbered Expenses – Both Direct and Cost Share

## Manual Adjustments

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Adjusted Budget Expense</th>
<th>Adjusted Encumbered Expense</th>
<th>Adjusted Budget Cost Share</th>
<th>Adjusted Encumbered Cost Share</th>
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</thead>
<tbody>
<tr>
<td>Senior Personnel</td>
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<tr>
<td>Other Personnel</td>
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<td>Fringe Benefits</td>
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<td>Equipment</td>
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<td>Participant Costs</td>
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<td>Other Direct Costs</td>
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<tr>
<td>Indirect Costs</td>
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</table>

Build your Budget Scenario / Forecasting Tool

- **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
- Other project team members can view budget scenarios but they cannot modify
- View your Built Budget Scenario

Reflecting your Built Scenario
Salary Summary by Employee

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

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

- **Contract:**
- **Sponsor:**
- **Name:**

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.

<table>
<thead>
<tr>
<th>ExpendedName</th>
<th>Expenditure Summary</th>
<th>Expended FandA Summary</th>
<th>Expended Total Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Entries - JE, ID, Misc</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
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.


- Add a blank budget period to the Project Summary Detail by Period page in Project Summary.
SAMtool Enhancements in Progress

- 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.

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Questions, Comments, Suggestions?