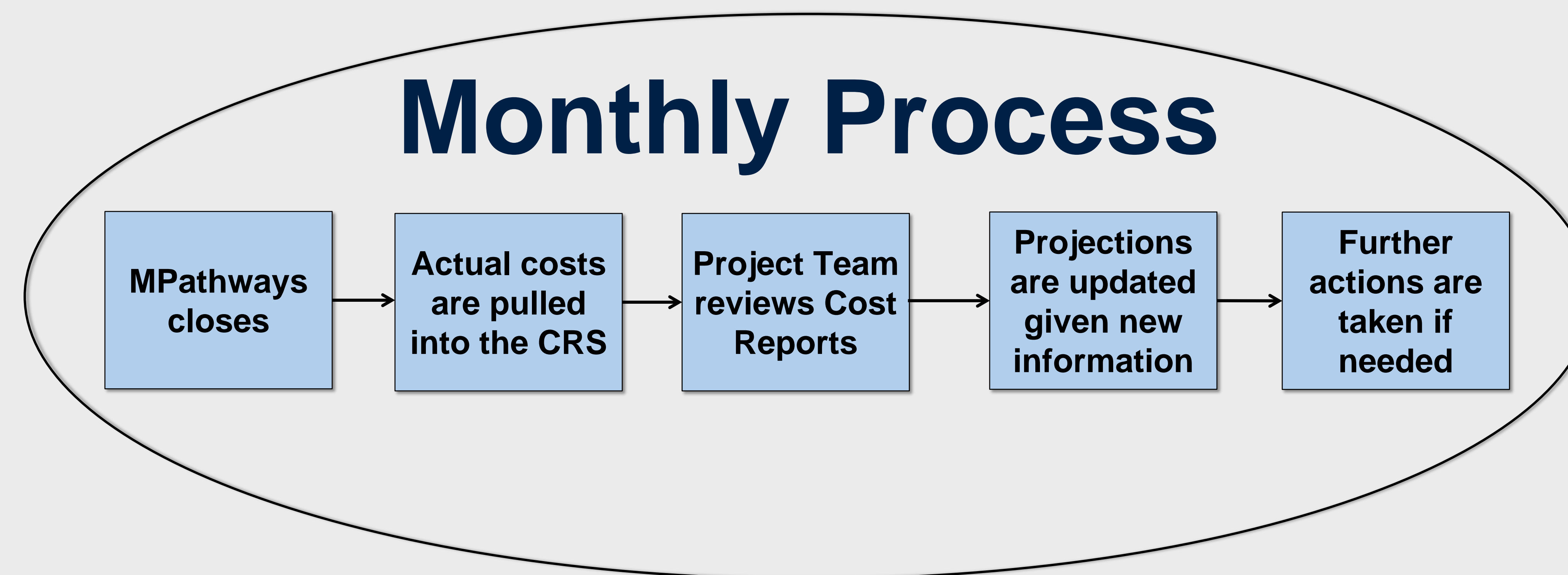




Finance Tools

CRS - CRS SANDBOX - RFT



What is the RFT?

- The RFT (Resource Forecasting Tool) is a .NET system that compiles projections for Sponsored projects, non Sponsored projects and out of the office time by employee

How the RFT Works

- A staff deployment tool that uses a .NET framework for its interface
- The RFT uses CRS data as its base data – therefore the tool can import up to date projections to run various real-time scenarios
- Can generate Excel based reporting allowing management to view multiple departments/roles/individuals
- For projects not yet funded, RFT can create unfunded projects to assist with staff deployment

EmpName	General Title	WBS_DESCR	2016-05	2016-06	2016-07	2016-08	2016-09	2016-10	2016-11	2016-12	2017-01	2017-02	2017-03	2017-04
Smith, Bob	HRS 2016		24	16	8	8	8	8	8	8	8	8		
Smith, Bob	HRS 2016 PANEL		60	16	8	8	8	8	8	8	8	8	8	
Smith, Bob	HRS HCAP		60	20	10	10	10	10	10	10				
Smith, Bob	MTF 2013-2017		4											
Smith, Bob	NSFG CONTINUOUS CYCLES 8-10		4	4	4	4	17	7	7	7	17	7	7	7
Smith, Bob	SOCIAL NETWORKS AND WELL BEING		20	40	40	20	10	5	5	5	5			
Smith, Bob	SRO TECH SYS MAINT	Stuff	40											
Smith, Bob	Projection Total		172	136	70	50	53	38	38	38	38	23	15	7
Smith, Bob	Work Hours		176	176	168	184	176	168	176	176	176	160	184	160
Smith, Bob	GAP		4	40	98	134	123	130	138	138	138	137	169	153
	Holidays & SRO Closure Days		8		8		8		24	56	8			

Finance Acronyms

CRS: Cost Reporting System

RFT: Resource Forecasting Tool

Send questions feedback and ideas to:

isr-srofiningroup@umich.edu

Related Reports

Project Tree Report:

SRO Projects by Project Grant or General Title

Projection & Budget Detail Report:

Details on the history of a project's projections or budget

SRO Project-Specific Recharge Rates:

How a project is being billed and projecting recharge expense

CRS Interviewer Projection Rates:

History of field interviewer rates used for projections

CRS vs Proposal Account

Mapping:

How did a project proposal budget get mapped in to the CRS

Coming Soon: CRS Sandbox

CRS Sandbox:

A tool to quickly run projection scenarios for various project contingencies.

Will leverage existing CRS data and utilities to allow for multiple adjustable scenarios.

Will be distinct from CRS to ensure accuracy of projections for decision making, but also being able to view various change scenarios to control costs

What is the CRS?

- The CRS (Cost Reporting System) is a SQL based system that compiles budget, costs and projections by Project on a monthly basis

How the CRS Works

- The CRS is updated monthly with current actuals when University business closes
- Data from the Data Warehouse is combined with Finance specific fields by using multiple SQL stored procedures that allow us to report on Salary and Non-Salary expenses by Project
- Once the data is compiled in SQL, Excel is used to manipulate the data via pivot tables and crosstabs
- The Excel report is available in the Finance section of the SRO Intranet and can be downloaded to the desktop or run directly off the SRO Intranet
- CRS projections and budget can be entered at any time (live), at varying levels (names or job titles) and at the task level (Project Management, Main Data Collection, Questionnaire Development, etc...)
- The CRS reports can be specialized to best suit your needed level of detail and can be saved for future reporting

Projection Updates

- Monthly Projection of Hours
- Monthly Projection of Non-Salary
- Weekly Projection of Field Interviewer