PI Portfolio Phase 3: Projections

highlights

The PI Portfolio updates provide you with quick access to current, detailed actuals and projections. Now you can view projections for your funds and drill down to detail from summary pages. You can easily see which funds have projected deficits. You can access more detailed transaction and personnel information and create projections using the Projections tab.

increased functionality for Projections

- Link to the projections input form with integrated HCM data for autoload of personnel projections
- Displays each projection with line item comments and description
- Displays personnel by dollar amount or by distribution %
- Three sections: Anticipated Funding, Non-Compensation Expenses, Personnel

increased visibility in Transactions

- Detail of transaction is viewable down to the account code level
- Filters and reports can be customized and saved according to your preferences

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