PI Dashboard User Guide

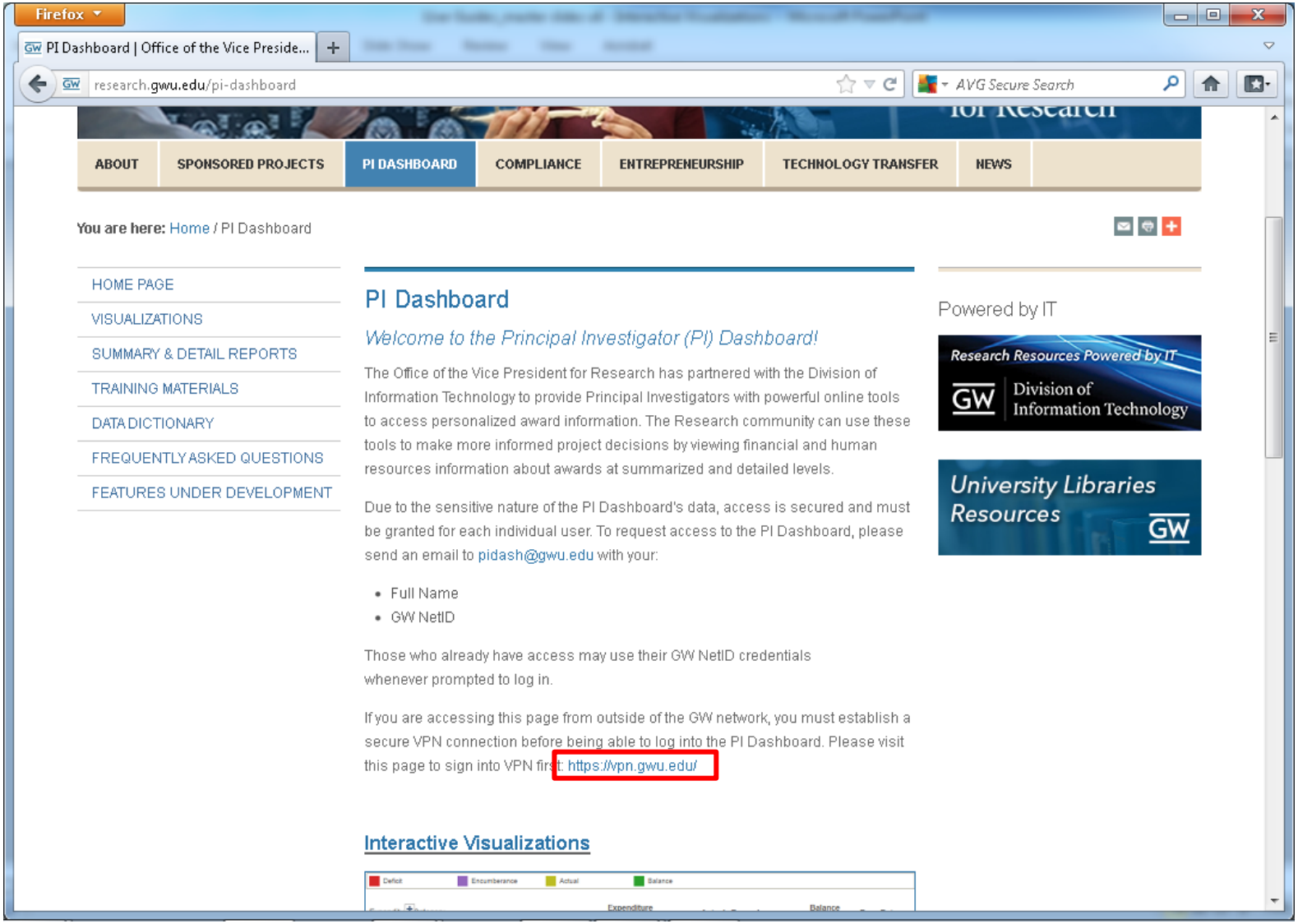
Release 4

Interactive Visualizations

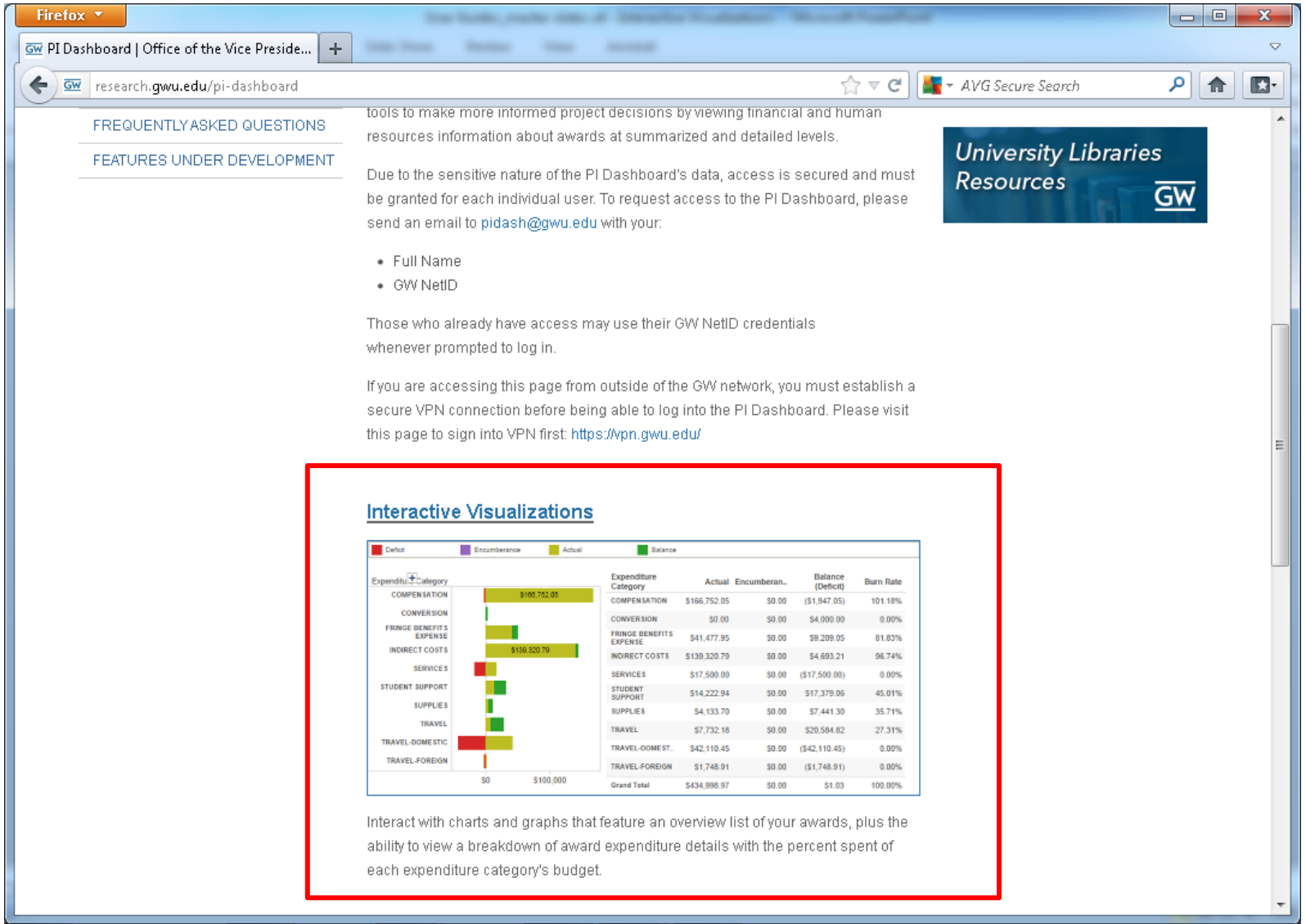
THE GEORGE WASHINGTON UNIVERSITY
WASHINGTON, DC

GW Business Intelligence
- turning GW data into actionable insight -

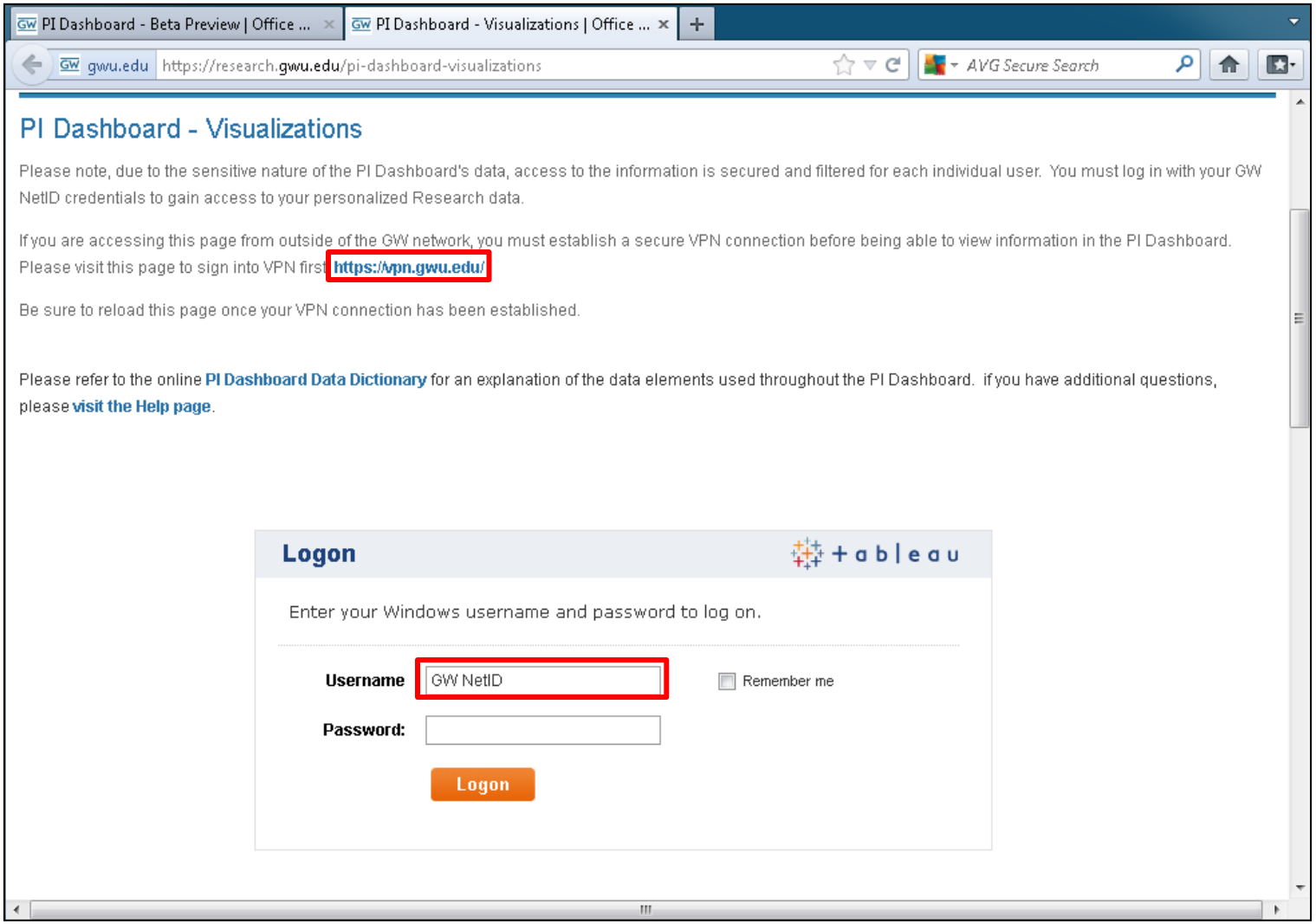
If you are accessing the site remotely, click the link to sign into VPN first then return to the PI Dashboard.



Click the Interactive Visualizations link or image.



When a new window opens, sign in with your GW NetID credentials. If you do not see a login prompt, connect to VPN and then reload the page.



New Features in PI Dashboard Release 4

New Reports:

● **Monthly Run Rate**
o Summarizes an award's total expenses by month and calculates the average monthly expenditure. The report then projects total expenditures to the end of the award and will predict if the award will go over or under Budget
o Accessible through the PI Dashboard's More Tools tab: http://research.gwu.edu/pi-dashboard-visualizations

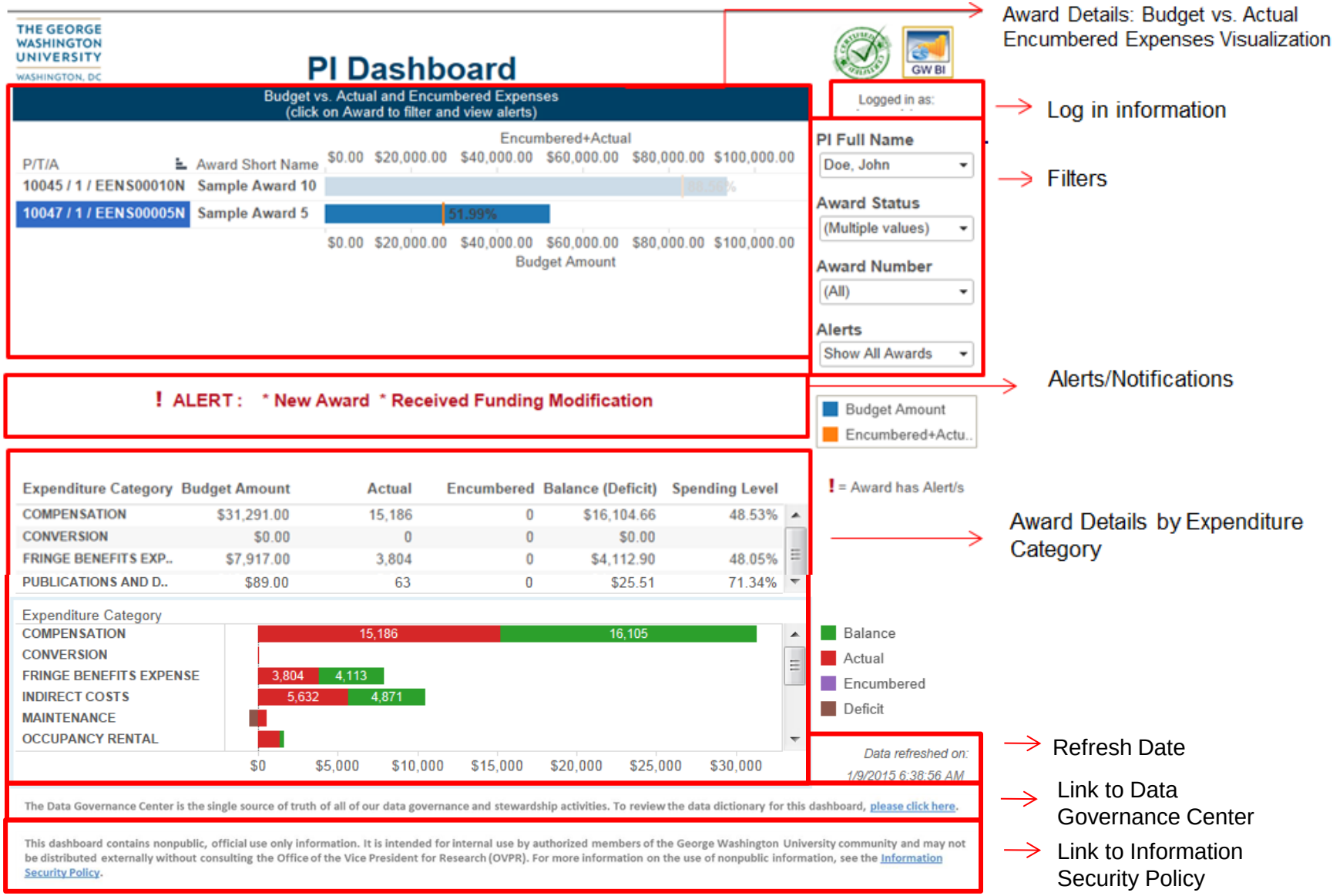
● **Labor Effort report**
o Shows the percent of effort spent by an employee on a given award based on Banner HR Labor Distributions
o Also includes the percent of effort spent on teaching and on other awards within the same pay period
o Labor Distributions are broken down by PICT code, pay number, Banner Index and Position No
o Accessible through the PI Dashboard's More Tools tab: http://research.gwu.edu/pi-dashboard-visualizations

Modified Features:

● **Interactive Visualizations**
o Alerts are now incorporated in the Budget and Actuals visualization. The Alerts tab has been taken out. If an award has an alert, the user will see an exclamation mark "!". Clicking on the award then displays the award's alert/s.
o An award filter has also been added to let users view only awards with alerts.
o A new tab has been added called "More Tools". Users will be able to drill to other reports from this tab (see New Reports above).

● Reports include a "Data refreshed on:" date at the bottom right of the dashboard to inform users of when the data was loaded into the warehouse (Note: Barring any technical issues, data on the PI Dashboard is as of the close of the previous business day.)

PI Dashboard Overview



Award Details: Budget vs. Actual Encumbered Expenses Visualization

Log in information

Filters

Alerts/Notifications

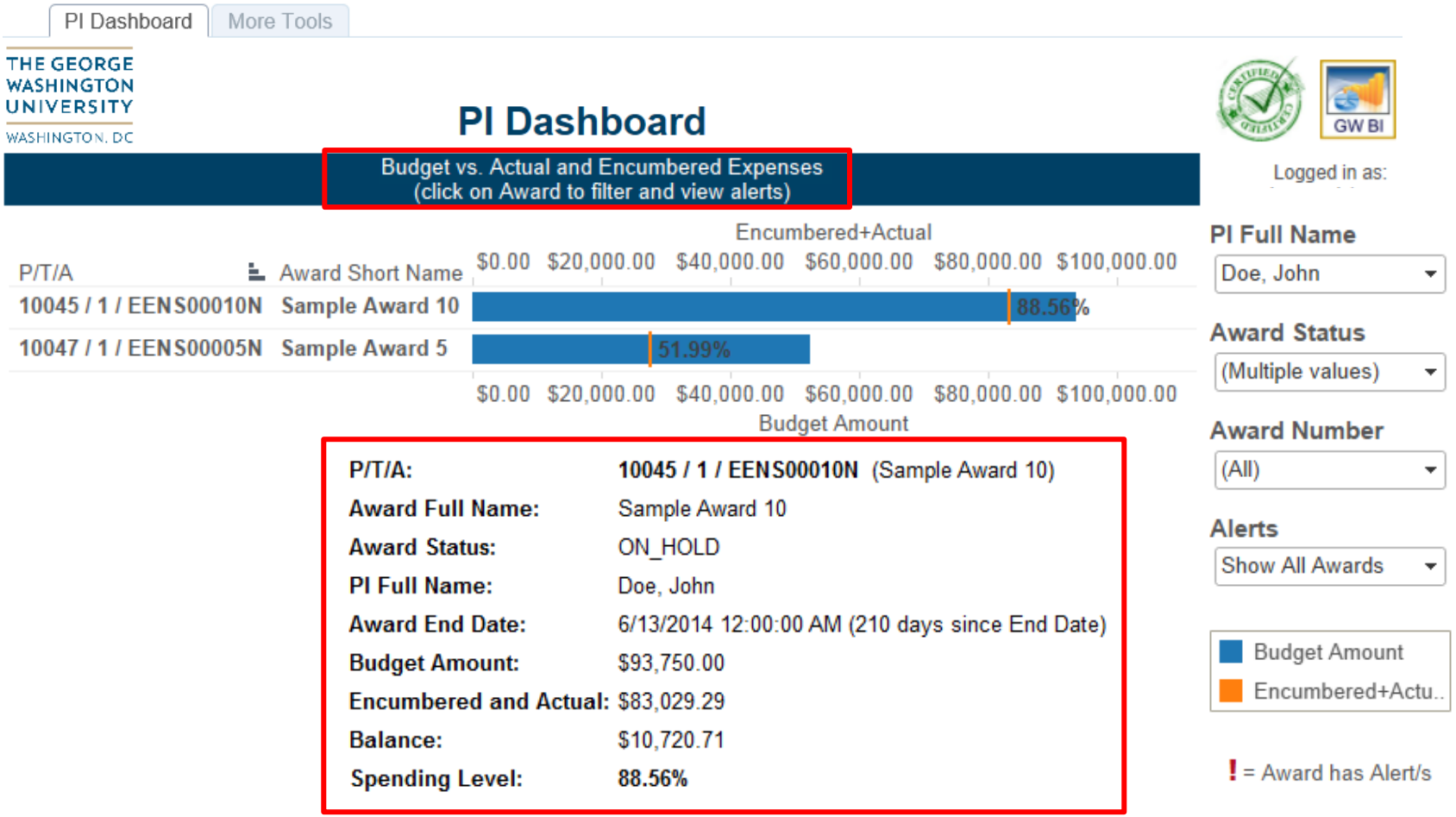
Award Details by Expenditure Category

Refresh Date

Link to Data Governance Center

Link to Information Security Policy

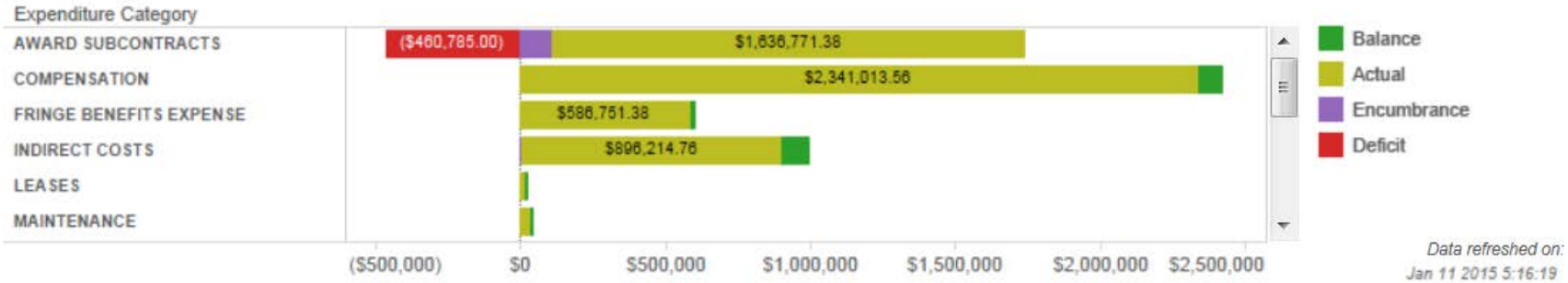
Award Details: Budget vs. Actuals and Encumbrances



Award Details: Budget vs. Encumbrances and Actuals by Expenditure Category

Click on one of the Awards. Award Details by Expenditure Category will appear.

Expenditure Category	Budget	Actual	Encumbrance	Balance (Deficit)	Spending Level
AWARD SUBCONTRACTS	$1,284,100.00	$1,636,771.38	$108,113.62	($460,785.00)	135.88%
COMPENSATION	$2,428,502.00	$2,341,013.56	$0.00	$87,488.44	96.40%
FRINGE BENEFITS EXPENSE	$607,210.00	$586,751.38	$0.00	$20,458.62	96.63%
INDIRECT COSTS	$999,006.00	$896,214.76	$3,251.26	$99,539.98	90.04%
LEASES	$24,925.00	$17,004.49	$0.00	$7,920.51	68.22%
MAINTENANCE	$44,163.00	$35,786.83	$0.00	$8,376.17	81.03%
NON-CAPITALIZED FURNITU..	$0.00	$879.80	$0.00	($879.80)	



Data refreshed on: Jan 11 2015 5:16:19

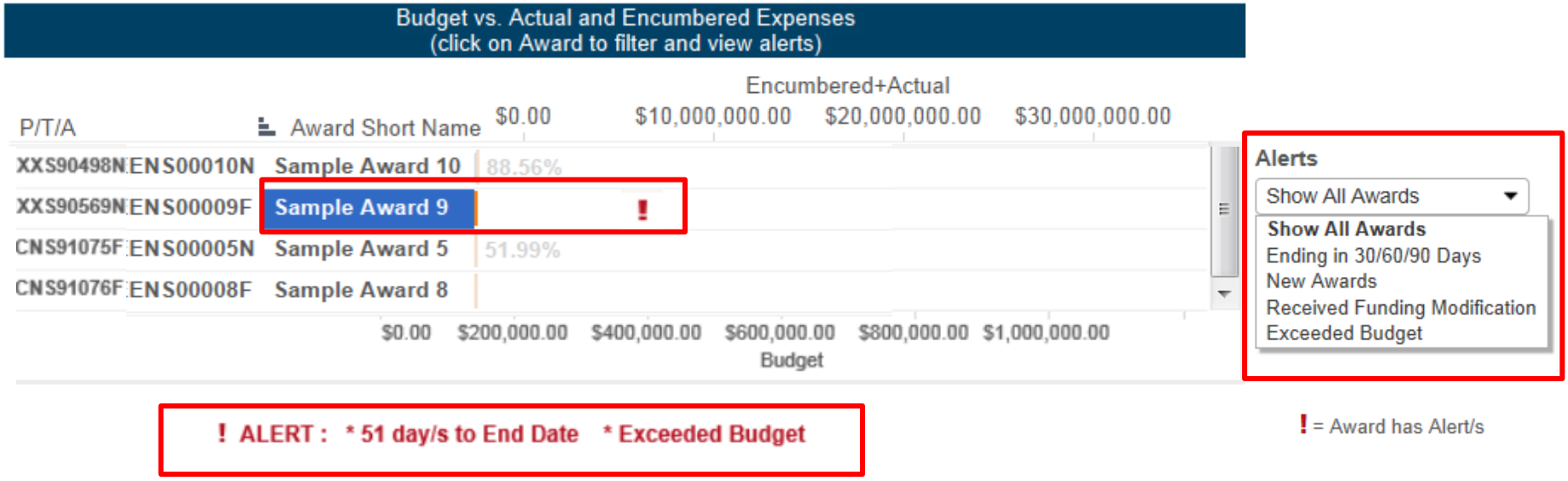
Award Alerts – Show All Awards

There are four different Alerts and Notifications:

- **Ending in 30/60/90 Days**
- **New Awards**
- **Received Funding Modification**
- **Exceeded Budget**

Choosing "Show All Awards" in Alerts Filter will show all awards regardless if they have alerts or not.

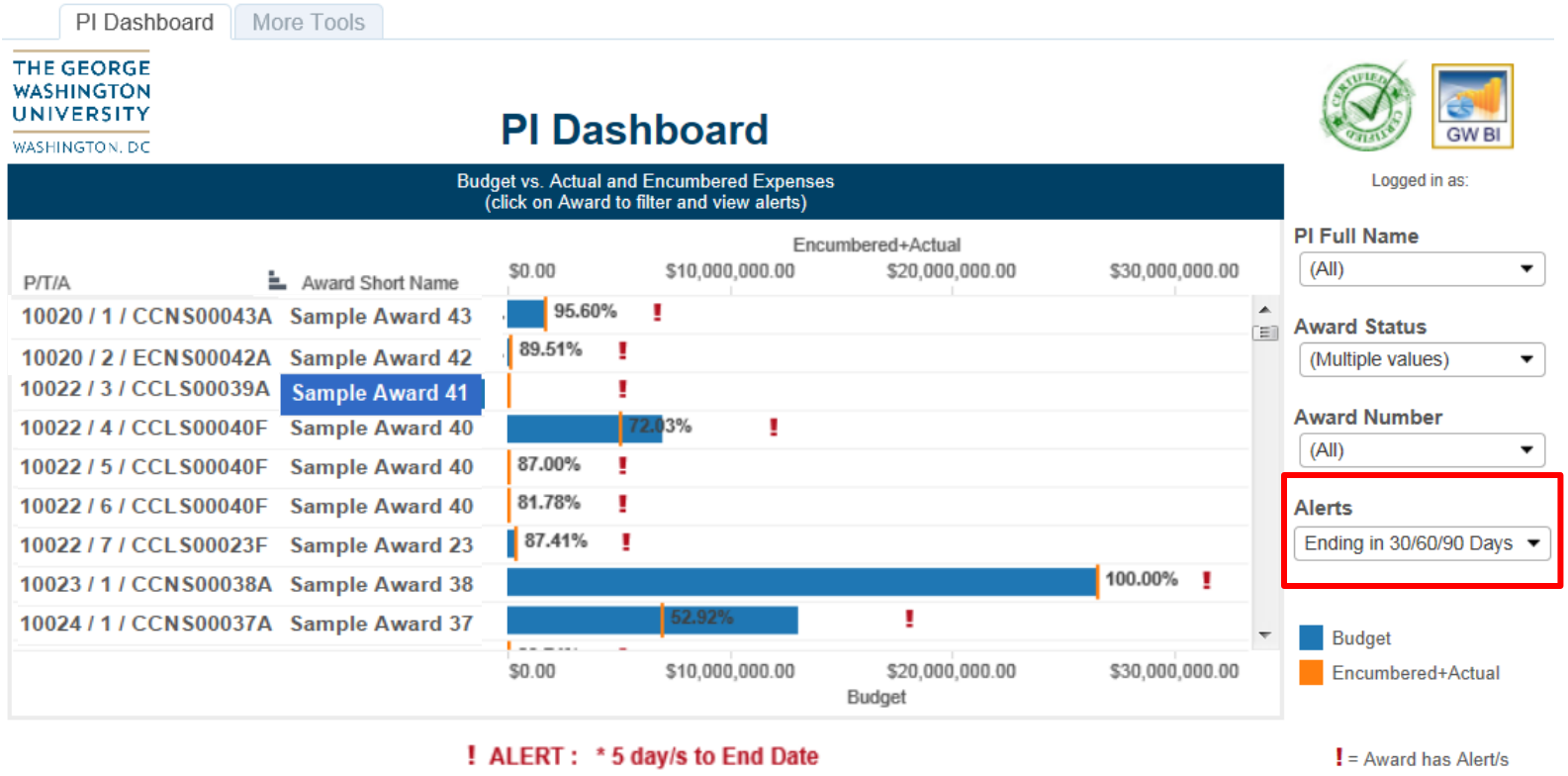
Click on the award with ! shown on the right side and the detail of the Alert will appear.



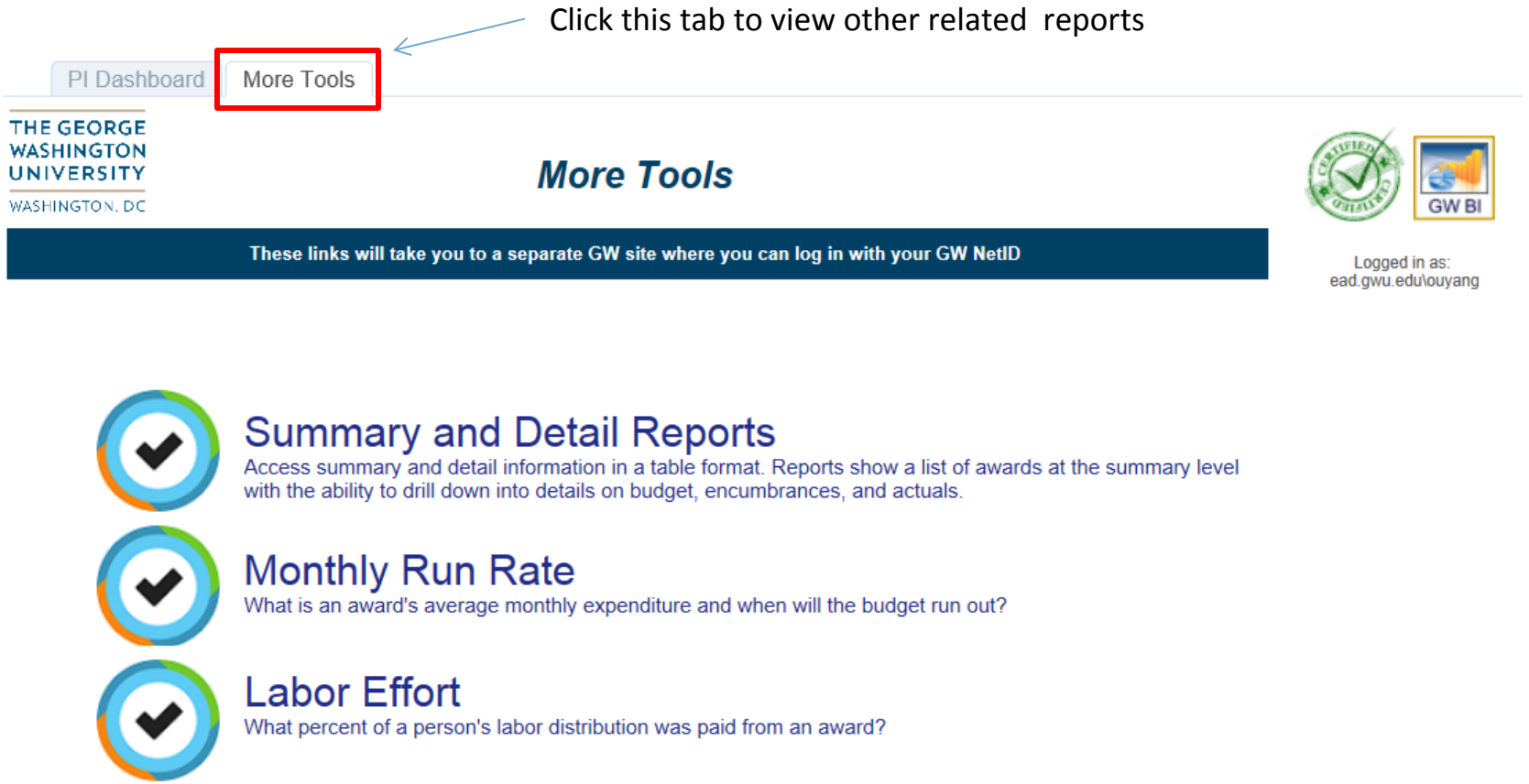
Award Alerts and Notifications – Show Awards with a Certain Alert

Selecting a certain Alert in the Alerts filter (e.g. "Ending in 30/60/90 Days") will cause the PI Dashboard to display only Awards with the corresponding Alert.

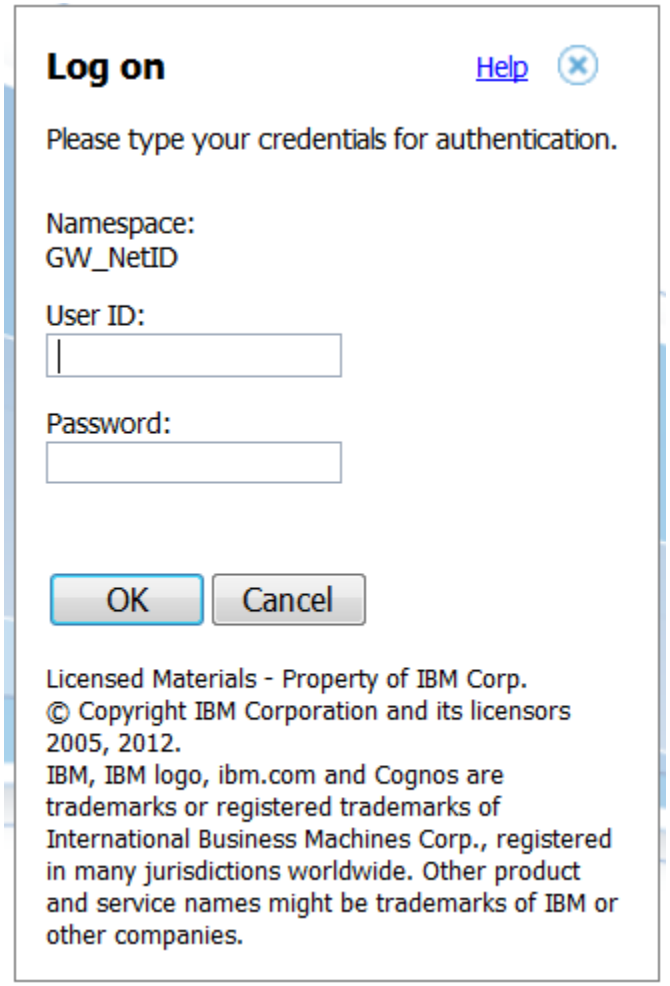
Click on the award with ! shown on the right side and the detail of the Alert will appear.



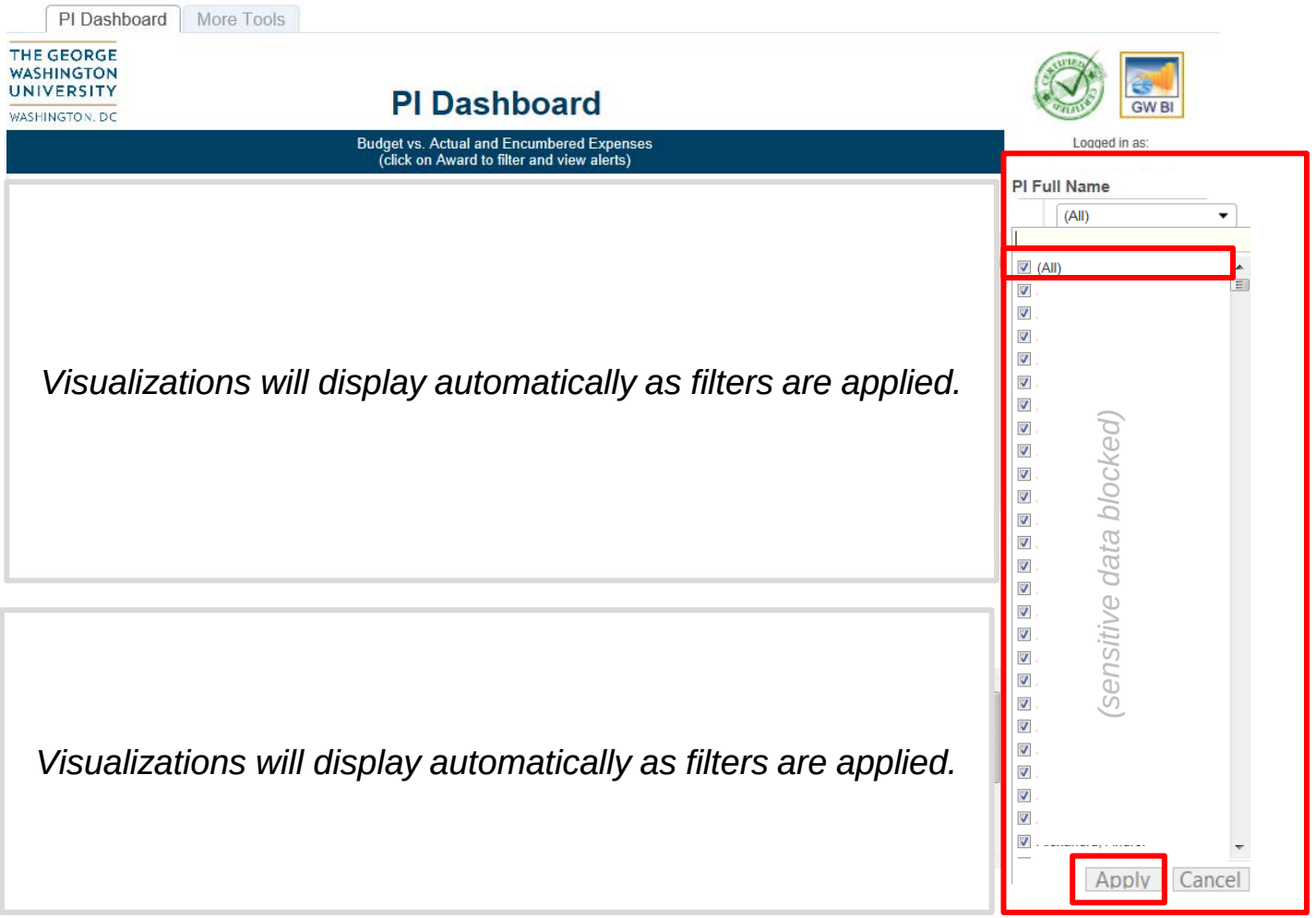
To view other reports: click on the “More Tools” tab, then click on one of the check marks



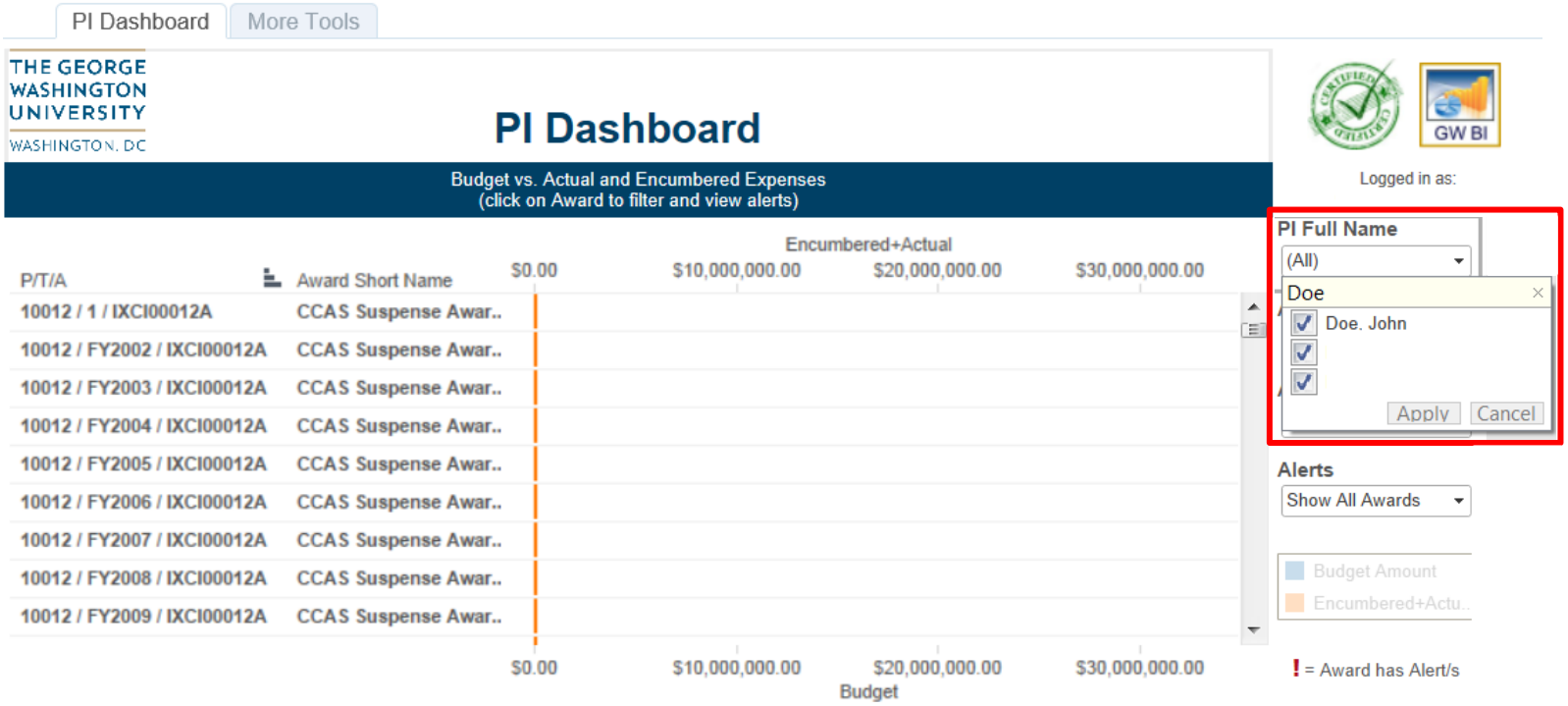
Please log in with your GW_NetID and password. This will bring you to the other reports.



Tips for using filters: use checkboxes to view multiple choices at a time, then click “Apply”. The All box displays all choices (unchecking it resets that filter).

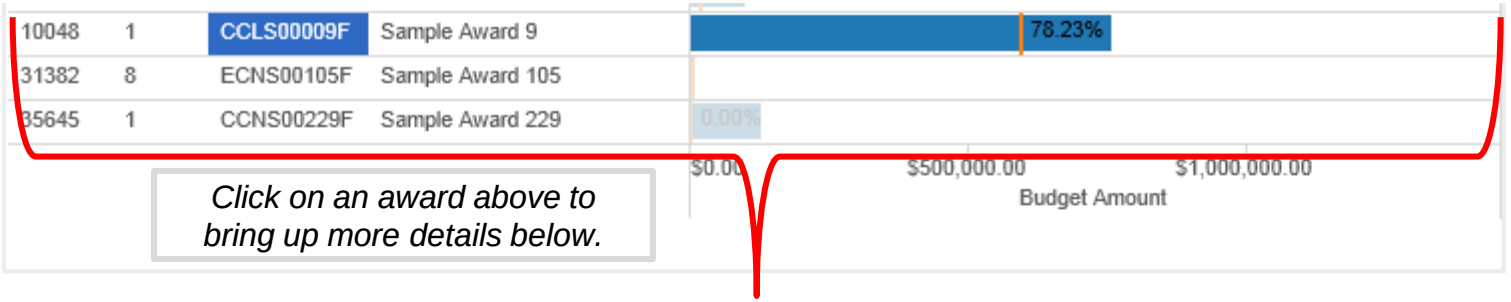


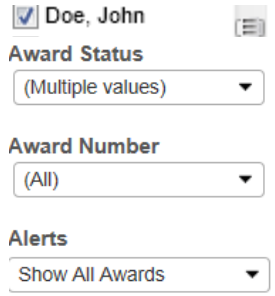
Click on the filter to use the search toolbar. Results appear as you type. Visualizations will automatically adjust to any filter selections.



Roll over the bars on the visualizations to view pop-up windows with more detailed information. If your pop-up disappears, simply rollover the bar again.

Clicking on an award's bar in the top will bring up more details below. The bar chart is explained with pop-ups, color coding, and a legend.

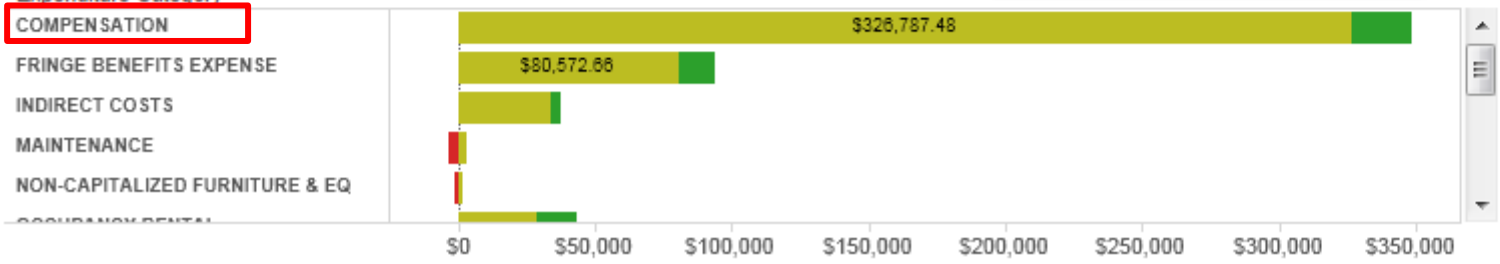


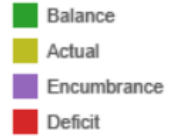


Expenditure Category	Budget Amount	Actual	Encumberance	Balance (Deficit)	Spending Level
COMPENSATION	$348,362.00	$326,787.48	$0.00	$21,574.52	93.81%
FRINGE BENEFITS EXPENSE	$94,057.00	$80,572.66	$0.00	$13,484.34	85.66%
INDIRECT COSTS	$37,597.00	$34,090.58	$0.00	$3,506.42	90.67%
MAINTENANCE	$0.00	$2,995.20	$0.00	($2,995.20)	
NON-CAPITALIZED FURNITU..	$0.00	$1,353.76	$0.00	($1,353.76)	
OCCUPANCY RENTAL	$43,475.00	$28,800.56	$0.00	$14,674.44	66.25%
PRINTING	$0.00	$11.28	$0.00	($11.28)	
PUBLICATIONS AND DUES	$0.00	$542.88	$0.00	($542.88)	

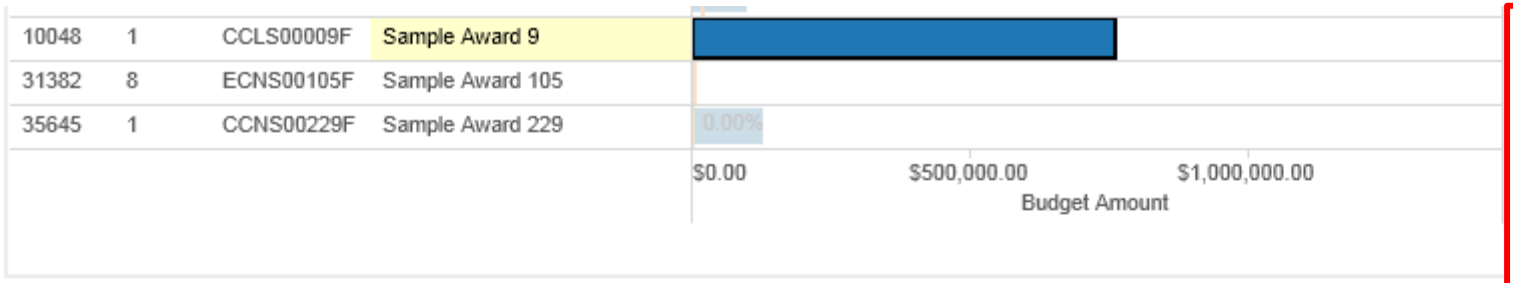
! = Award has Alert/s

Expenditure Category: **COMPENSATION**
Actual: **$326,787.48**
Spending Level: **93.81%**





The table is another view of the chart's data. Table rows also have rollover pop-up details. You can still update these visualizations instantly using the filters.



Award Status
(Multiple values)

Award Number
(All)

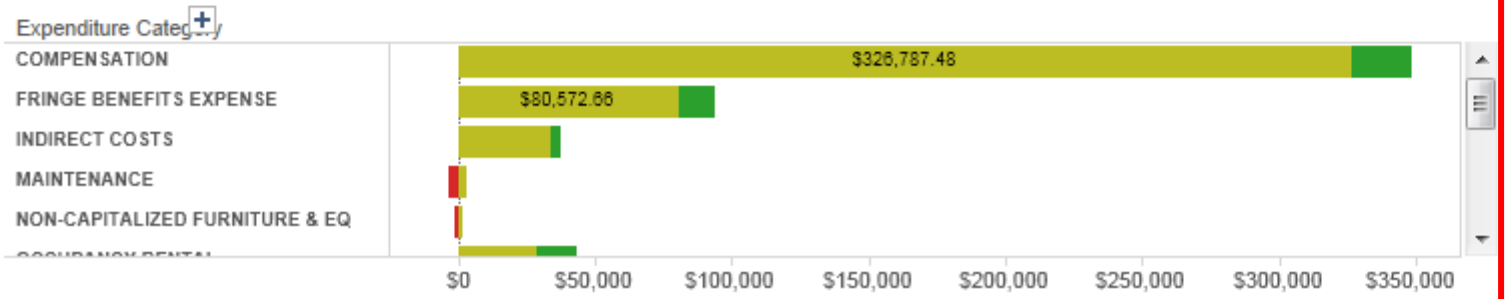
Alerts
Show All Awards

Budget
Encumbered+Actual

! = Award has Alert/s

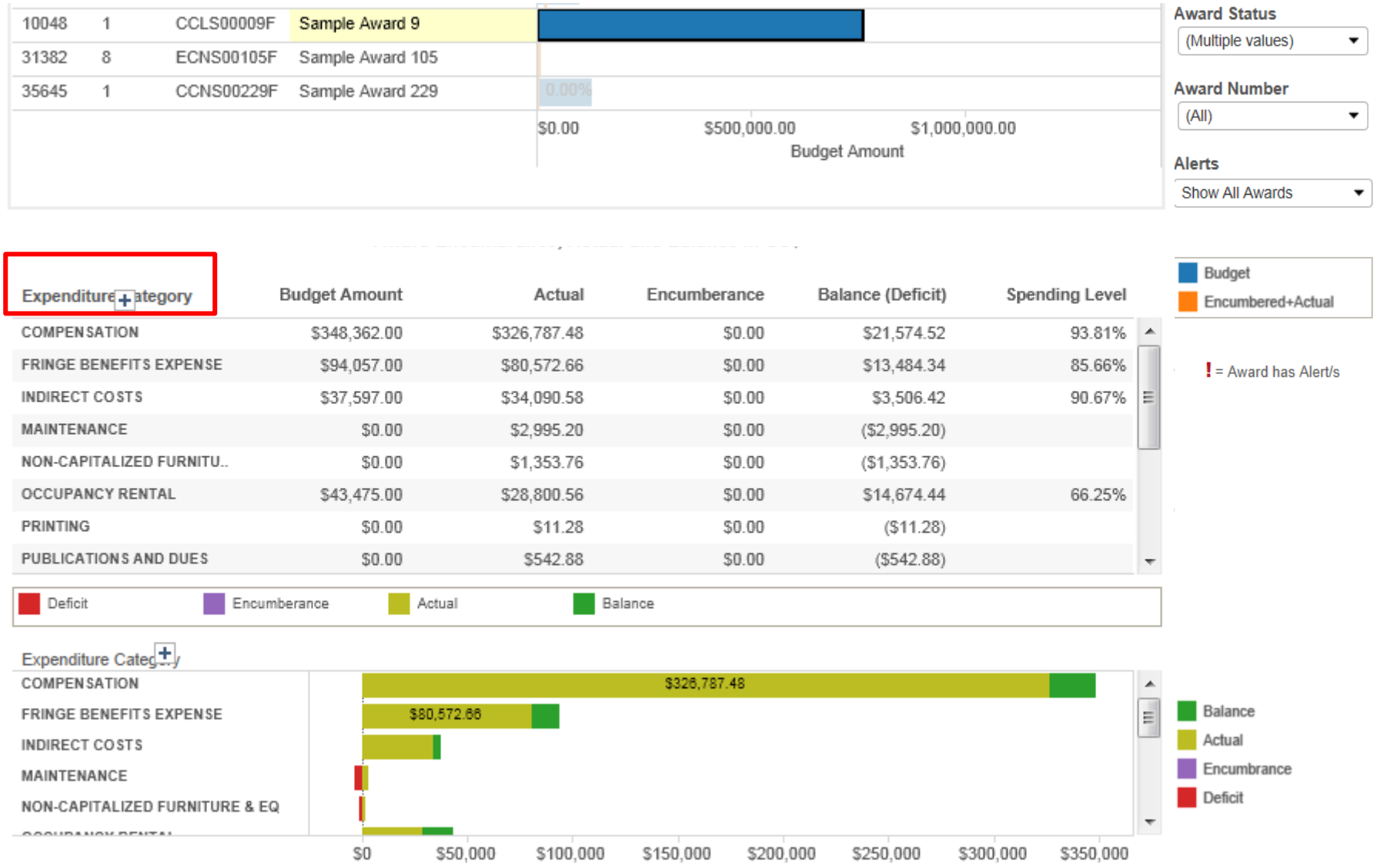
Expenditure Category	Budget Amount	Actual	Encumberance	Balance (Deficit)	Spending Level
COMPENSATION	$348,362.00	$326,787.48	$0.00	$21,574.52	93.81%
FRINGE BENEFITS EXPENSE	$94,057.00	$80,572.66	$0.00	$13,484.34	85.66%
INDIRECT COSTS	$37,597.00	$34,(		.42	90.67%
MAINTENANCE	$0.00	$2,(		20)	
NON-CAPITALIZED FURNITU..	$0.00	$1,(		76)	
OCCUPANCY RENTAL	$43,475.00	$28,800.56	$0.00	$14,674.44	66.25%
PRINTING	$0.00	$11.28	$0.00	($11.28)	
PUBLICATIONS AND DUES	$0.00	$542.88	$0.00	($542.88)	

Measure Names: **Actual**
Expenditure Category: **OCCUPANCY RENTAL**
Measure Values: **$28,800.56**

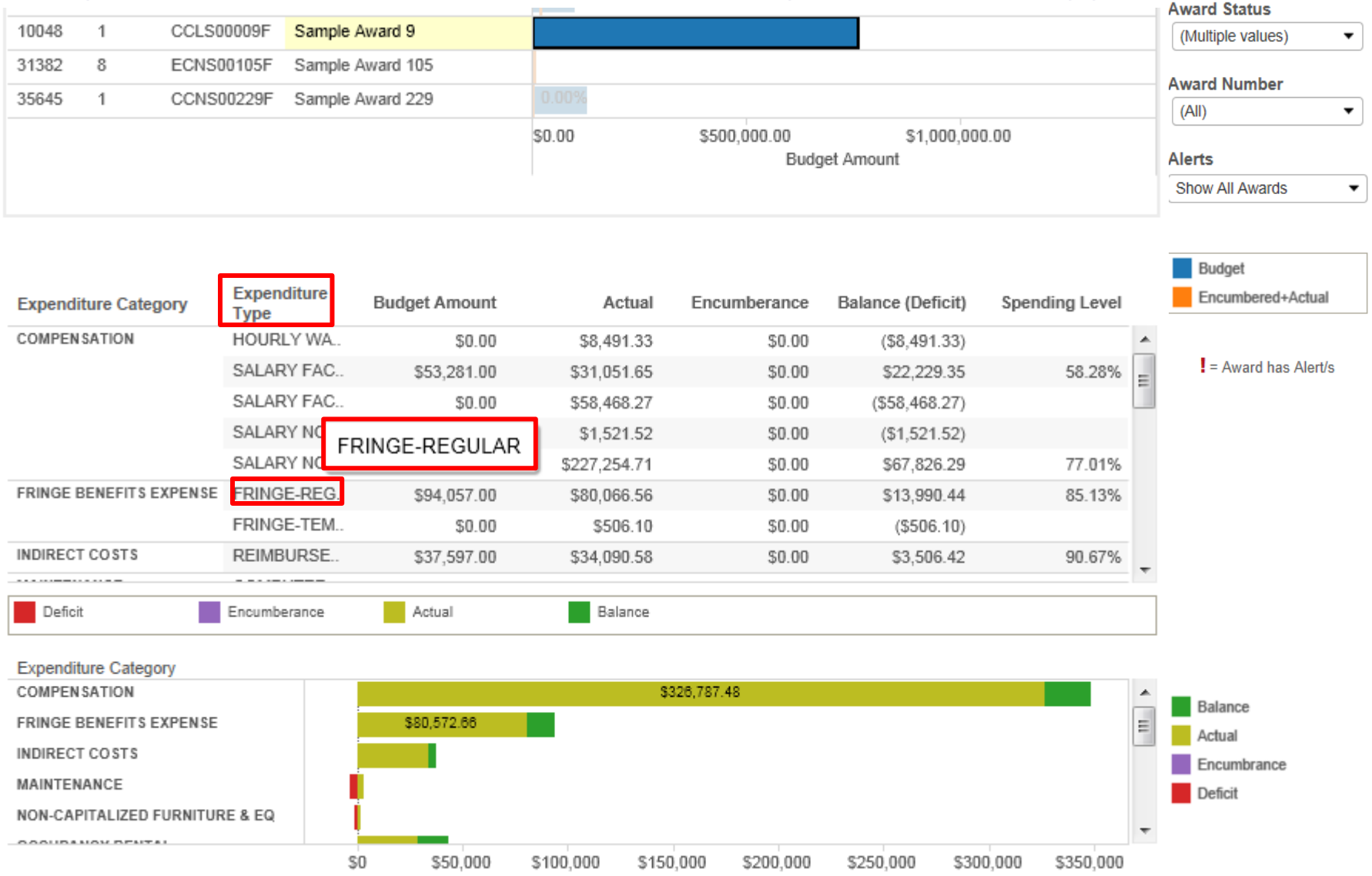


Balance
Actual
Encumbrance
Deficit

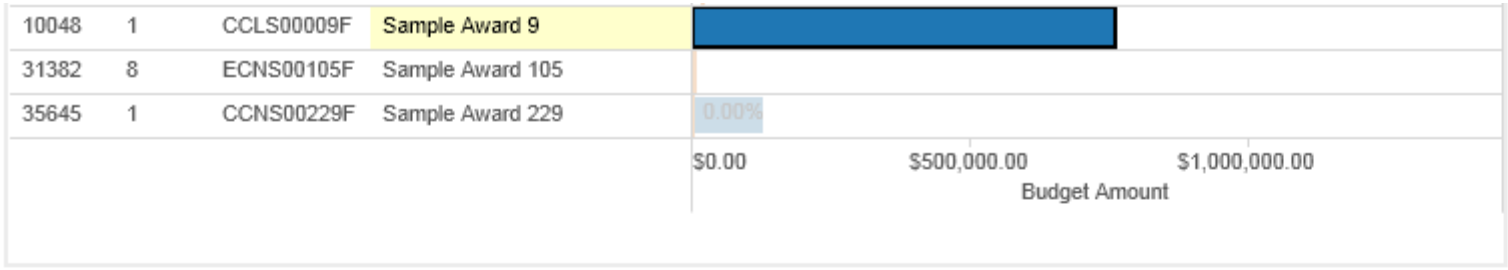
Some columns have expandable details. Rollover the column name (e.g. Expenditure Category) and click the expand icon (“+”) for details (Expenditure Type).



Some columns have expandable details. Rollover the column name (e.g. Expenditure Category) and click the expand icon ("+") for details (Expenditure Type).



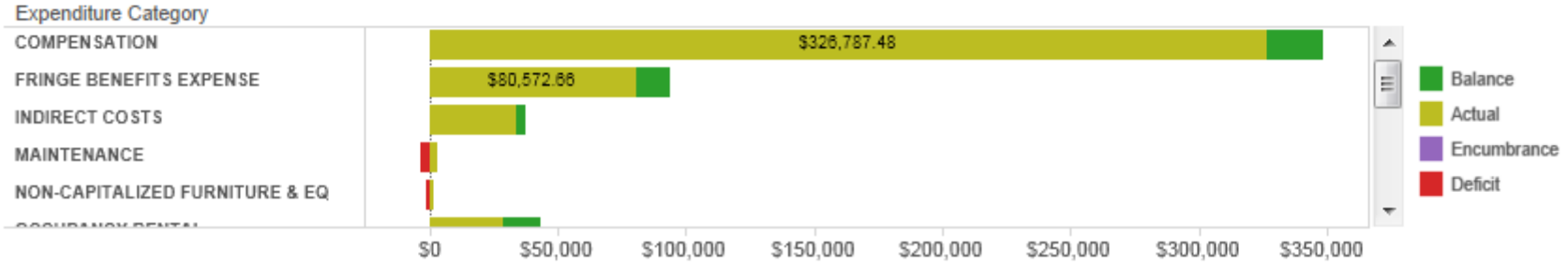
Certain columns can be sorted in ascending and descending order. Rollover a column name to enable its sort icon.



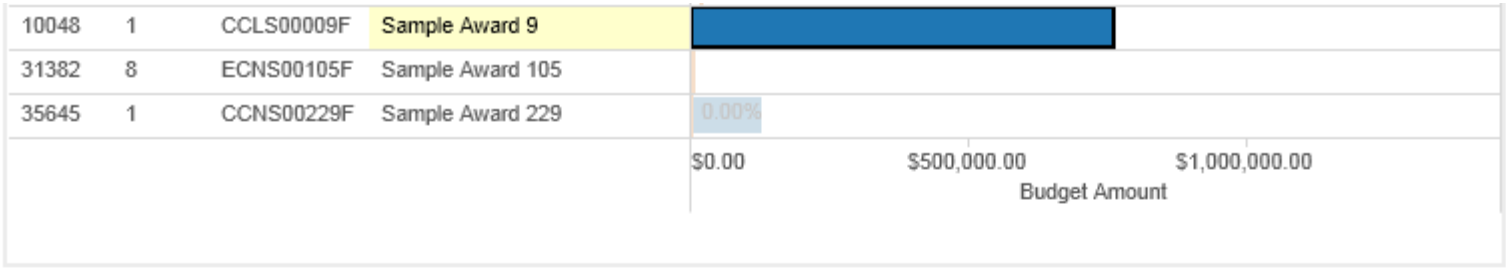
Expenditure Category	Expenditure Type	Budget Amount	Actual	Encumberance	Balance (Defi	Spending Level
COMPENSATION	HOURLY WA..	$0.00	$8,491.33	$0.00	($8,491.33)	
	SALARY FAC..	$53,281.00	$31,051.65	$0.00	$22,229.35	58.28%
	SALARY FAC..	$0.00	$58,468.27	$0.00	($58,468.27)	
	SALARY NON..	$0.00	$1,521.52	$0.00	($1,521.52)	
	SALARY NON..	$295,081.00	$227,254.71	$0.00	$67,826.29	77.01%
FRINGE BENEFITS EXPENSE	FRINGE-REG..	$94,057.00	$80,066.56	$0.00	$13,990.44	85.13%
	FRINGE-TEM..	$0.00	$506.10	$0.00	($506.10)	
INDIRECT COSTS	REIMBURSE..	$37,597.00	$34,090.58	$0.00	$3,506.42	90.67%

Budget
Encumbered+Actual

! = Award has Alert/s



Click the sort icon to sort the table by that column. Clicking the icon again will reverse the sorting order.



Award Status
(Multiple values)

Award Number
(All)

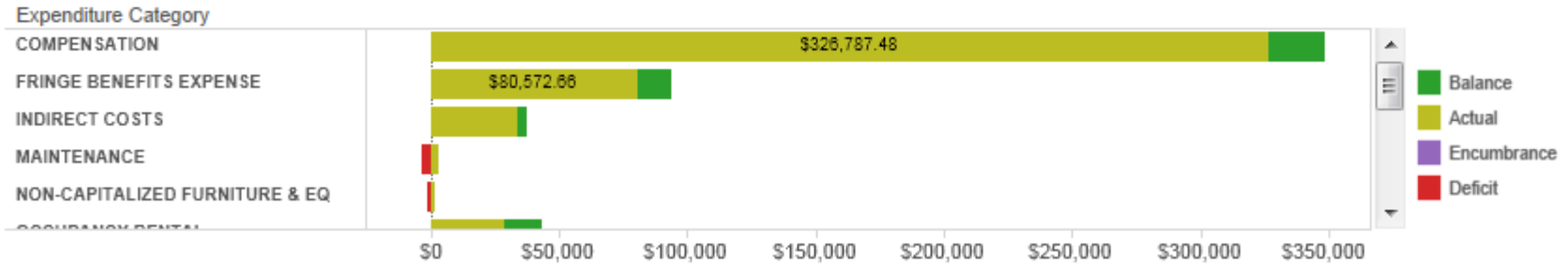
Alerts
Show All Awards

Expenditure Category	Budget Amount	Actual	Encumberance	Balance (Deficit)	Spending Level
STUDENT SUPPORT	$207,315.00	$104,193.00	$0.00	$103,122.00	50.26%
COMPENSATION	$348,362.00	$326,787.48	$0.00	$21,574.52	93.81%
OCCUPANCY RENTAL	$43,475.00	$28,800.56	$0.00	$14,674.44	66.25%
FRINGE BENEFITS EXPENSE	$94,057.00	$80,572.66	$0.00	$13,484.34	85.66%
SUPPLIES	$10,750.00	$1,079.83	$0.00	$9,670.17	10.04%
TRAVEL	$9,379.00	$3,511.51	$0.00	$5,867.49	37.44%
INDIRECT COSTS	$37,597.00	$34,090.58	$0.00	$3,506.42	90.67%
SERVICES	$3,000.00	$0.00	$0.00	$3,000.00	0.00%

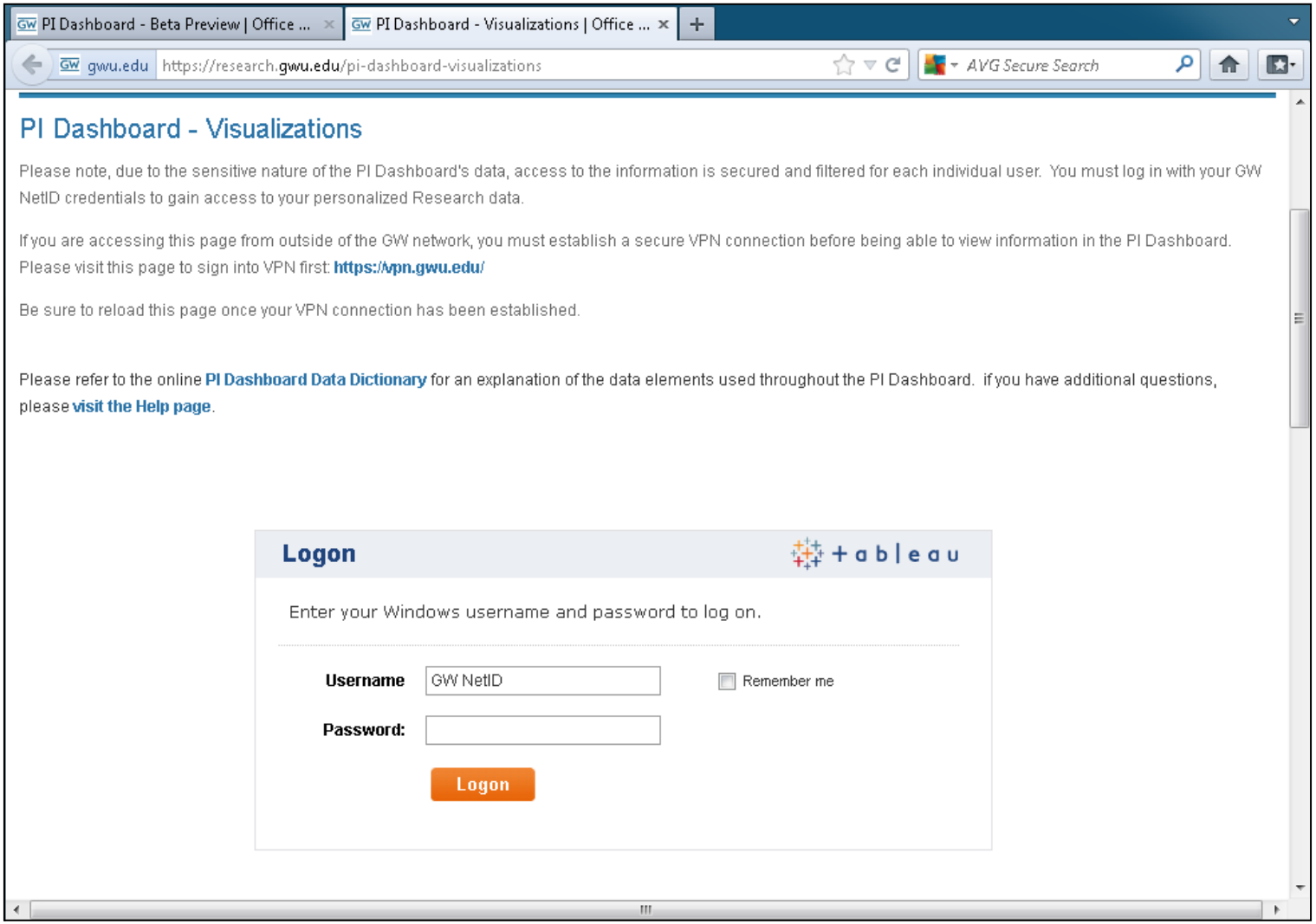
Budget
Encumbered+Actual

! = Award has Alert/s

Deficit Encumberance Actual Balance



Log off from the Visualizations tool by completely exiting that web browser. Revisit the page to login.



Please visit online resources for additional help.

- Training materials:

http://research.gwu.edu/pi-dashboard-training-materials

- FAQs:

http://research.gwu.edu/pi-dashboard-help

- Data Dictionary:

http://research.gwu.edu/pi-dashboard-data-dictionary

https://gwu.collibra.com/term/71938e8a-9390-4b0d-9e57-0586cf85549c#!=