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# PI Dashboard User Guide

Release 4

## Interactive Visualizations

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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.

The screenshot shows a Firefox browser window displaying the PI Dashboard website. The address bar shows the URL [research.gwu.edu/pi-dashboard](https://research.gwu.edu/pi-dashboard). The page features a navigation menu with links: ABOUT, SPONSORED PROJECTS, PI DASHBOARD (active), COMPLIANCE, ENTREPRENEURSHIP, TECHNOLOGY TRANSFER, and NEWS. Below the navigation menu, a breadcrumb trail reads "You are here: Home / PI Dashboard". A left sidebar contains a list of links: HOME PAGE, VISUALIZATIONS, SUMMARY & DETAIL REPORTS, TRAINING MATERIALS, DATADictionary, FREQUENTLY ASKED QUESTIONS, and FEATURES UNDER DEVELOPMENT. The main content area is titled "PI Dashboard" and includes a welcome message: "Welcome to the Principal Investigator (PI) Dashboard!". It explains that the Office of the Vice President for Research has partnered with the Division of Information Technology to provide Principal Investigators with powerful online tools to access personalized award information. It notes that access is secured and must be granted for each individual user, with a request to email [pidash@gwu.edu](mailto:pidash@gwu.edu) for access. A list of required information includes Full Name and GW NetID. It also states that users already have access may use their GW NetID credentials. For remote access, it instructs users to establish a secure VPN connection and visit <https://vpn.gwu.edu/> to sign into VPN first. At the bottom, there is a section for "Interactive Visualizations" with a legend for Deficit, Encumbrance, Actual, and Balance, and a partially visible chart.

Firefox

PI Dashboard | Office of the Vice Preside...

research.gwu.edu/pi-dashboard

AVG Secure Search

ABOUT SPONSORED PROJECTS **PI DASHBOARD** COMPLIANCE ENTREPRENEURSHIP TECHNOLOGY TRANSFER NEWS

You are here: Home / PI Dashboard

HOME PAGE  
VISUALIZATIONS  
SUMMARY & DETAIL REPORTS  
TRAINING MATERIALS  
DATADictionary  
FREQUENTLY ASKED QUESTIONS  
FEATURES UNDER DEVELOPMENT

## PI Dashboard

Welcome to the Principal Investigator (PI) Dashboard!

The Office of the Vice President for Research has partnered with the Division of Information Technology to provide Principal Investigators with powerful online tools to access personalized award information. The Research community can use these tools to make more informed project decisions by viewing financial and human resources information about awards at summarized and detailed levels.

Due to the sensitive nature of the PI Dashboard's data, access is secured and must be granted for each individual user. To request access to the PI Dashboard, please send an email to [pidash@gwu.edu](mailto:pidash@gwu.edu) with your:

- Full Name
- GW NetID

Those who already have access may use their GW NetID credentials whenever prompted to log in.

If you are accessing this page from outside of the GW network, you must establish a secure VPN connection before being able to log into the PI Dashboard. Please visit this page to sign into VPN first: <https://vpn.gwu.edu/>

### Interactive Visualizations

Deficit Encumbrance Actual Balance

Expenditure Balance

Powered by IT

Research Resources Powered by IT

GW Division of Information Technology

University Libraries Resources

GW

# Click the Interactive Visualizations link or image.

Firefox

GW PI Dashboard | Office of the Vice Preside... +

research.gwu.edu/pi-dashboard

AVG Secure Search

FREQUENTLY ASKED QUESTIONS

FEATURES UNDER DEVELOPMENT

tools to make more informed project decisions by viewing financial and human resources information about awards at summarized and detailed levels.

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University Libraries  
Resources

GW

### Interactive Visualizations

Deficit

Encumbrance

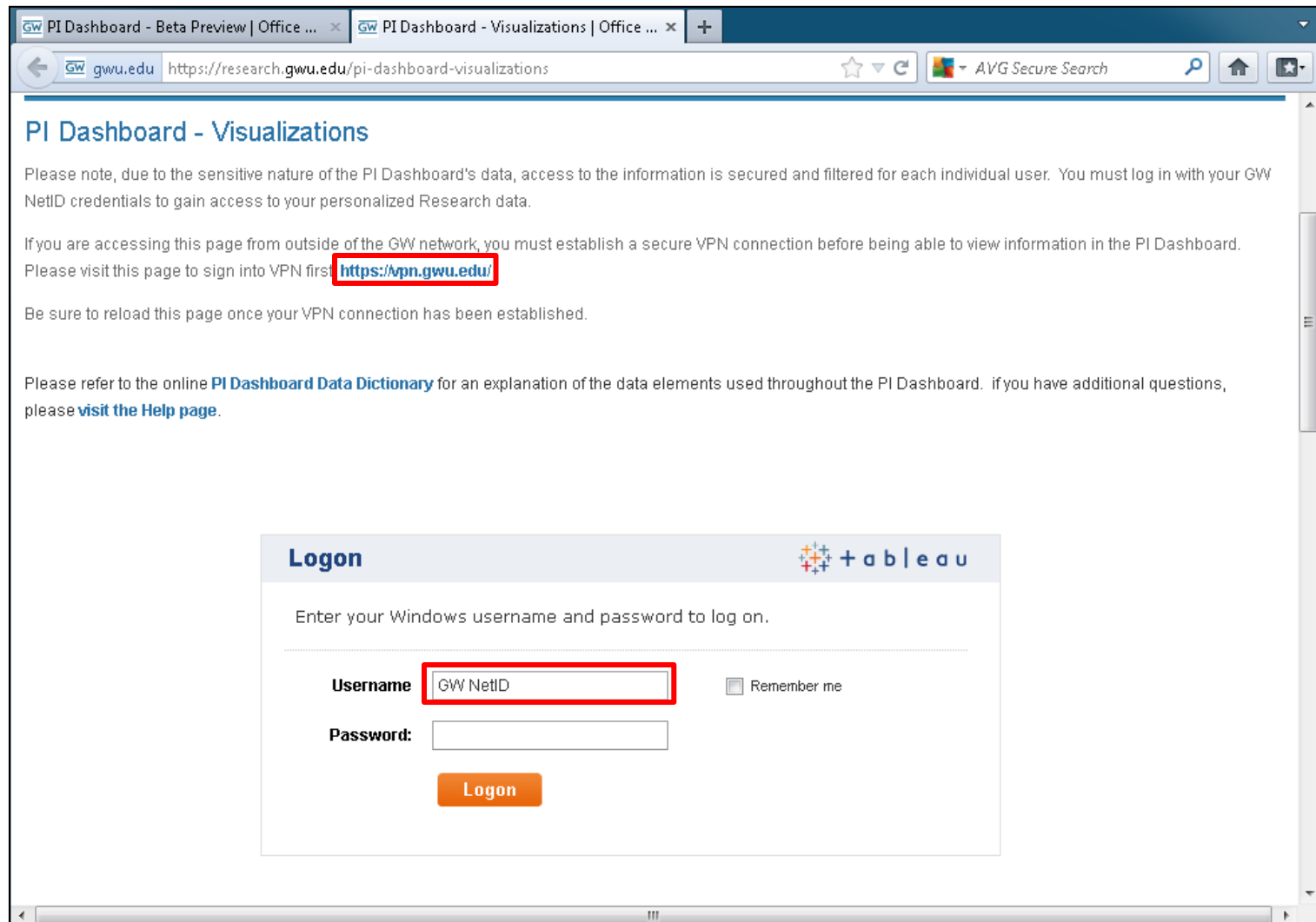
Actual

Balance

Expenditure Category	Actual	Encumbran..	Balance (Deficit)	Burn Rate
COMPENSATION	\$166,752.05	\$0.00	(\$1,947.05)	101.18%
CONVERSION	\$0.00	\$0.00	\$4,000.00	0.00%
FRINGE BENEFITS EXPENSE	\$41,477.95	\$0.00	\$9,209.05	81.83%
INDIRECT COSTS	\$139,320.79	\$0.00	\$4,693.21	96.74%
SERVICES	\$17,500.00	\$0.00	(\$17,500.00)	0.00%
STUDENT SUPPORT	\$14,222.94	\$0.00	\$17,379.06	45.01%
SUPPLIES	\$4,133.70	\$0.00	\$7,441.30	35.71%
TRAVEL	\$7,732.18	\$0.00	\$20,584.82	27.31%
TRAVEL-DOMESTIC	\$42,110.45	\$0.00	(\$42,110.45)	0.00%
TRAVEL-FORIGN	\$1,748.91	\$0.00	(\$1,748.91)	0.00%
Grand Total	\$434,998.97	\$0.00	\$1.03	100.00%

Interact with charts and graphs that feature an overview list of your awards, plus the ability to view a breakdown of award expenditure details with the percent spent of each expenditure category's budget.

**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.**




The screenshot shows a web browser window with two tabs: "GW PI Dashboard - Beta Preview | Office ..." and "GW PI Dashboard - Visualizations | Office ...". The address bar shows the URL "https://research.gwu.edu/pi-dashboard-visualizations". The page title is "PI Dashboard - Visualizations".

Please note, due to the sensitive nature of the PI Dashboard's data, access to the information is secured and filtered for each individual user. You must log in with your GW NetID credentials to gain access to your personalized Research data.

If you are accessing this page from outside of the GW network, you must establish a secure VPN connection before being able to view information in the PI Dashboard. Please visit this page to sign into VPN first <https://vpn.gwu.edu/>

Be sure to reload this page once your VPN connection has been established.

Please refer to the online [PI Dashboard Data Dictionary](#) for an explanation of the data elements used throughout the PI Dashboard. If you have additional questions, please [visit the Help page](#).

**Logon** 

Enter your Windows username and password to log on.

**Username**  ☐ Remember me

**Password:**

**Logon**

# New Features in PI Dashboard Release 4

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## 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**

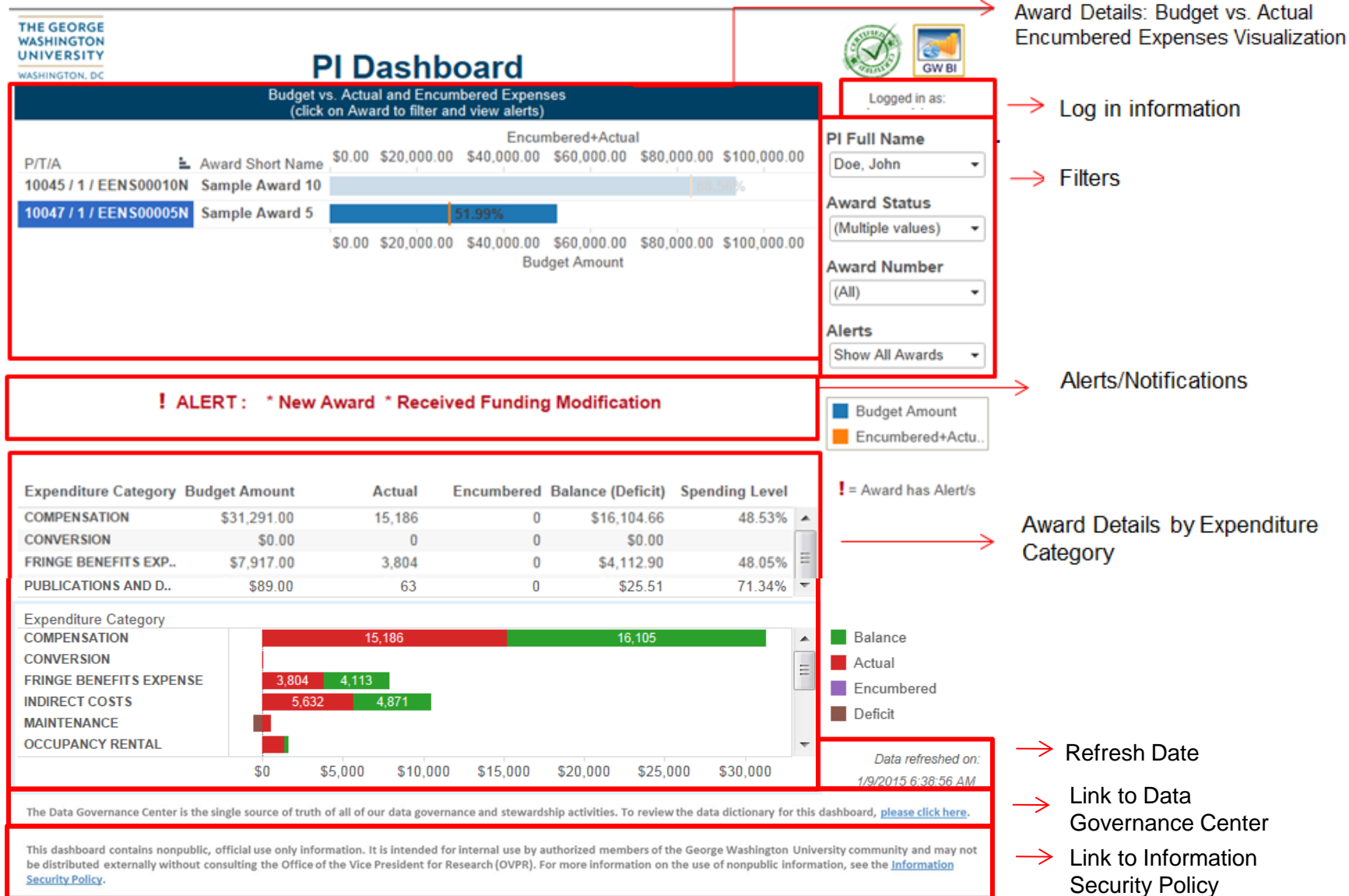
- o Shows the percent of effort spent by an employee on a given award based on Banner HR Labor Distributions
- o Also includes the percent of effort spent on teaching and on other awards within the same pay period
- o Labor Distributions are broken down by PICT code, pay number, Banner Index and Position 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. Actuals and Encumbrances

PI Dashboard More Tools

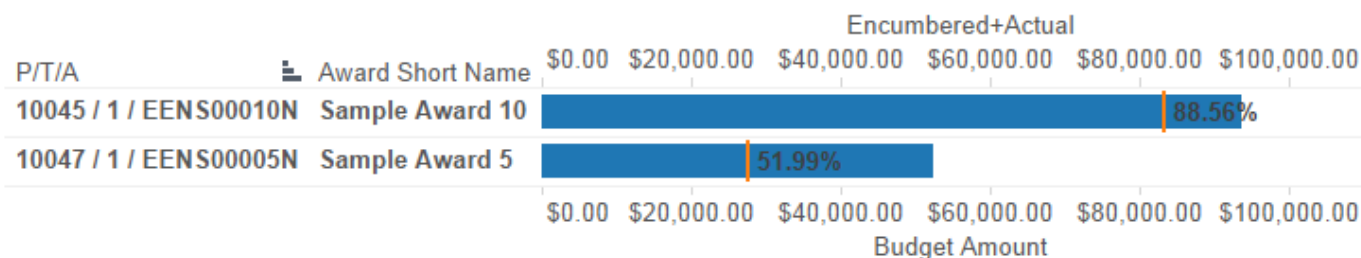
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WASHINGTON  
UNIVERSITY  
WASHINGTON, DC

## PI Dashboard

Budget vs. Actual and Encumbered Expenses  
(click on Award to filter and view alerts)



Logged in as:



PI Full Name

Doe, John

Award Status

(Multiple values)

Award Number

(All)

Alerts

Show All Awards

**P/T/A:** 10045 / 1 / EENS00010N (Sample Award 10)  
**Award Full Name:** Sample Award 10  
**Award Status:** ON\_HOLD  
**PI Full Name:** Doe, John  
**Award End Date:** 6/13/2014 12:00:00 AM (210 days since End Date)  
**Budget Amount:** \$93,750.00  
**Encumbered and Actual:** \$83,029.29  
**Balance:** \$10,720.71  
**Spending Level:** 88.56%

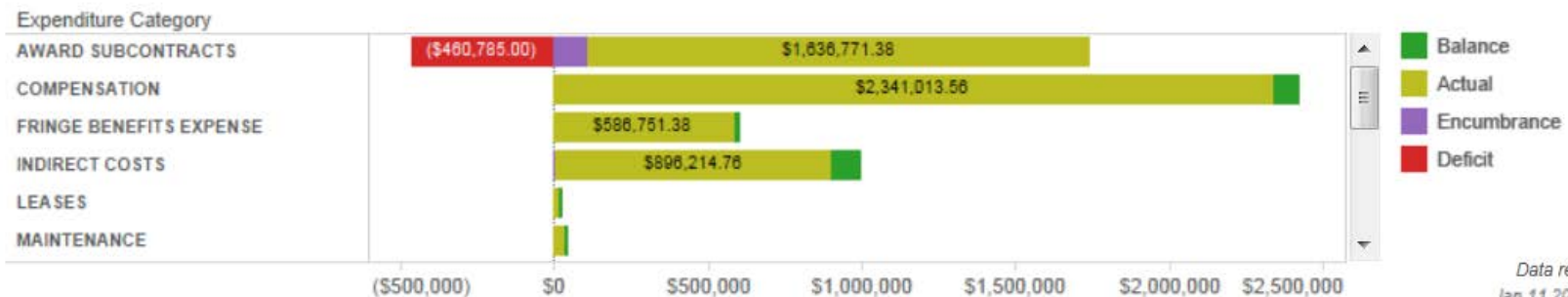
Budget Amount  
Encumbered+Actu..

! = Award has Alert/s

# 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



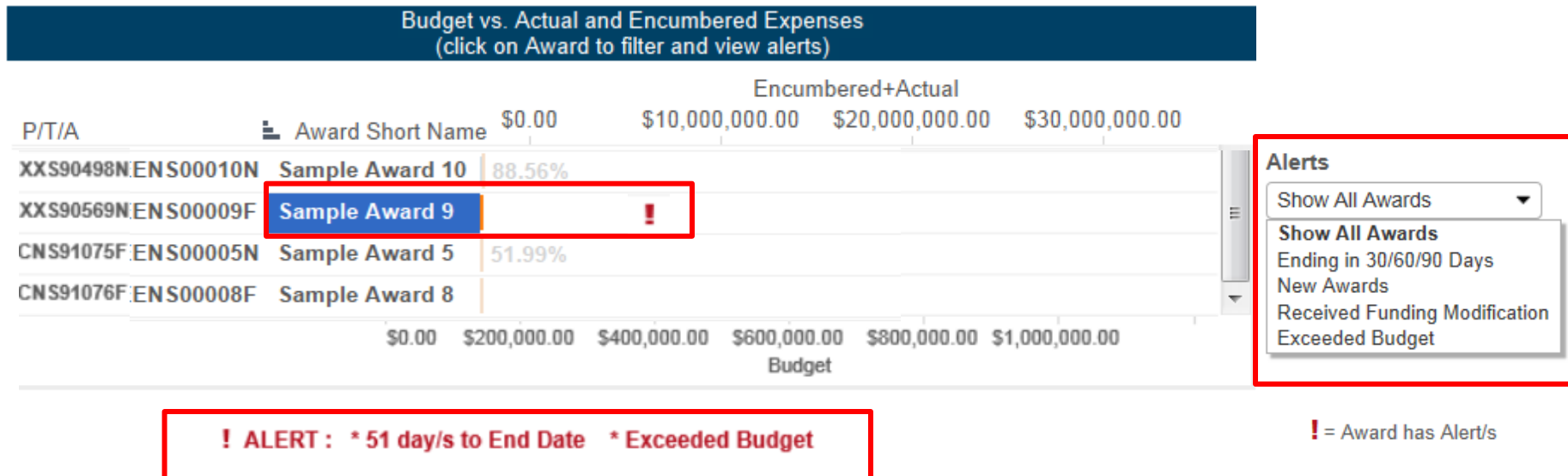
# Award Alerts – Show All Awards

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.

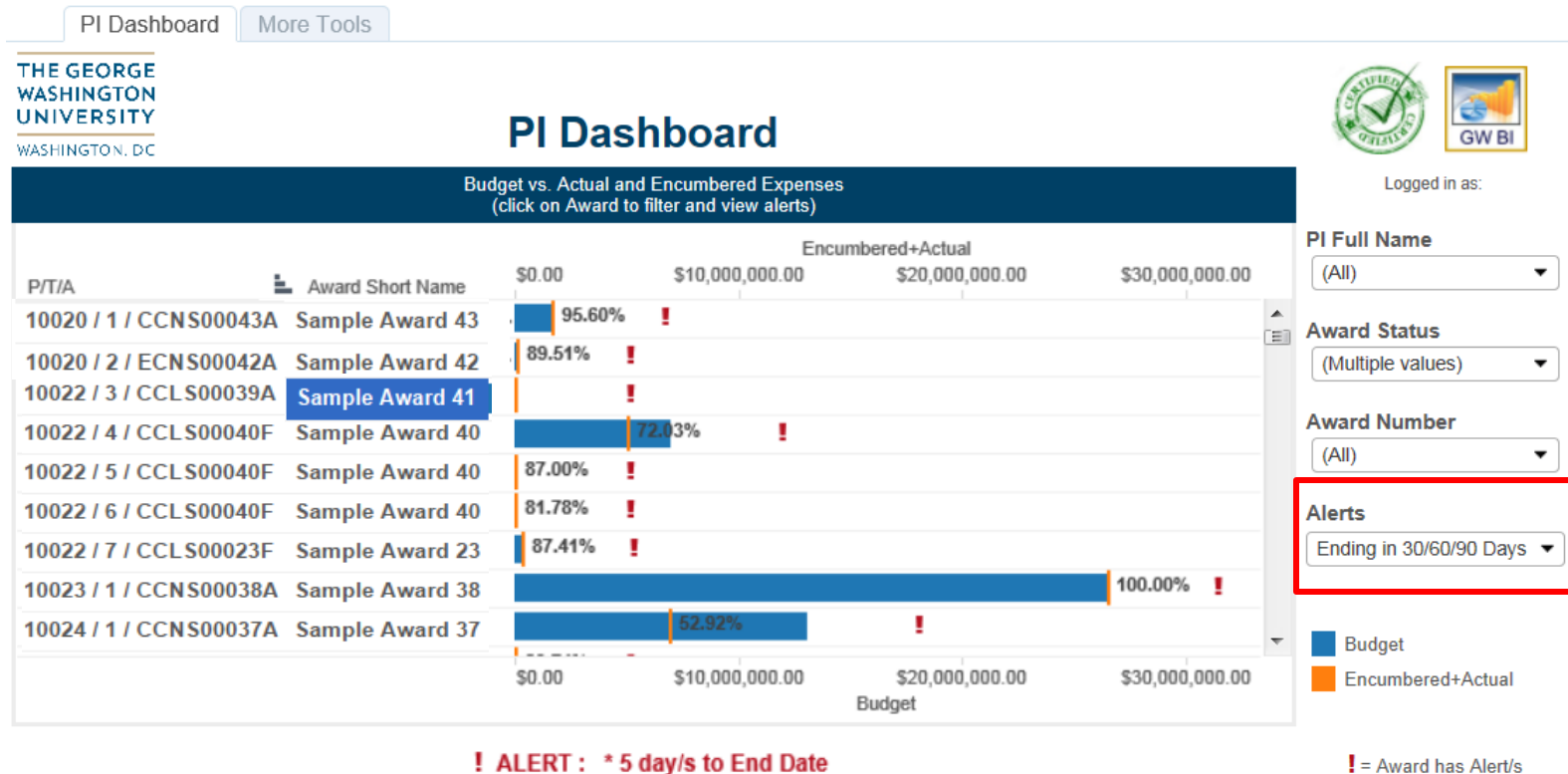
Click on the award with ! shown on the right side and the detail of the Alert will appear.



# Award Alerts and Notifications – Show Awards with a Certain Alert

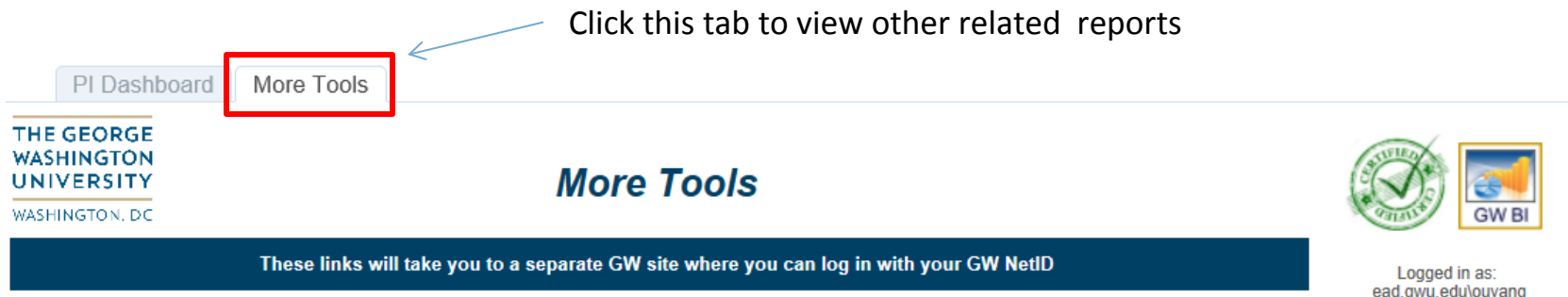
Selecting a certain Alert in the Alerts filter (e.g. "Ending in 30/60/90 Days") will cause the PI Dashboard to display only Awards with the corresponding Alert.

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**

Click this tab to view other related reports



PI Dashboard More Tools

**More Tools**

These links will take you to a separate GW site where you can log in with your GW NetID

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GW BI

Logged in as:  
ead.gwu.edu/ouyang



## Summary and Detail Reports

Access summary and detail information in a table format. Reports show a list of awards at the summary level with the ability to drill down into details on budget, encumbrances, and actuals.



## Monthly Run Rate

What is an award's average monthly expenditure and when will the budget run out?




## Labor Effort

What percent of a person's labor distribution was paid from an award?

# Please log in with your GW\_NetID and password. This will bring you to the other reports.

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**Log on** [Help](#) 

Please type your credentials for authentication.

Namespace:  
GW\_NetID

User ID:

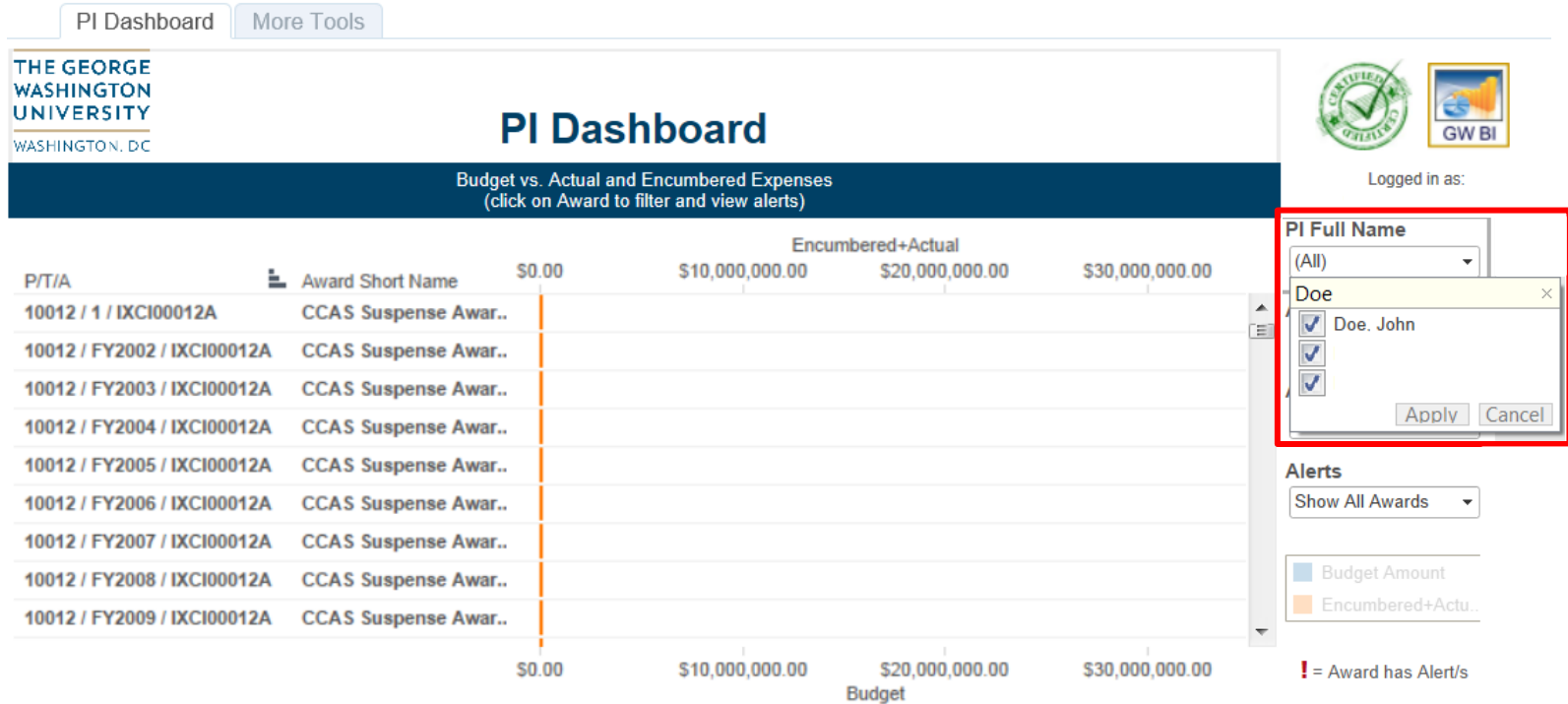
Password:

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© Copyright IBM Corporation and its licensors  
2005, 2012.  
IBM, IBM logo, ibm.com and Cognos are  
trademarks or registered trademarks of  
International Business Machines Corp., registered  
in many jurisdictions worldwide. Other product  
and service names might be trademarks of IBM or  
other companies.

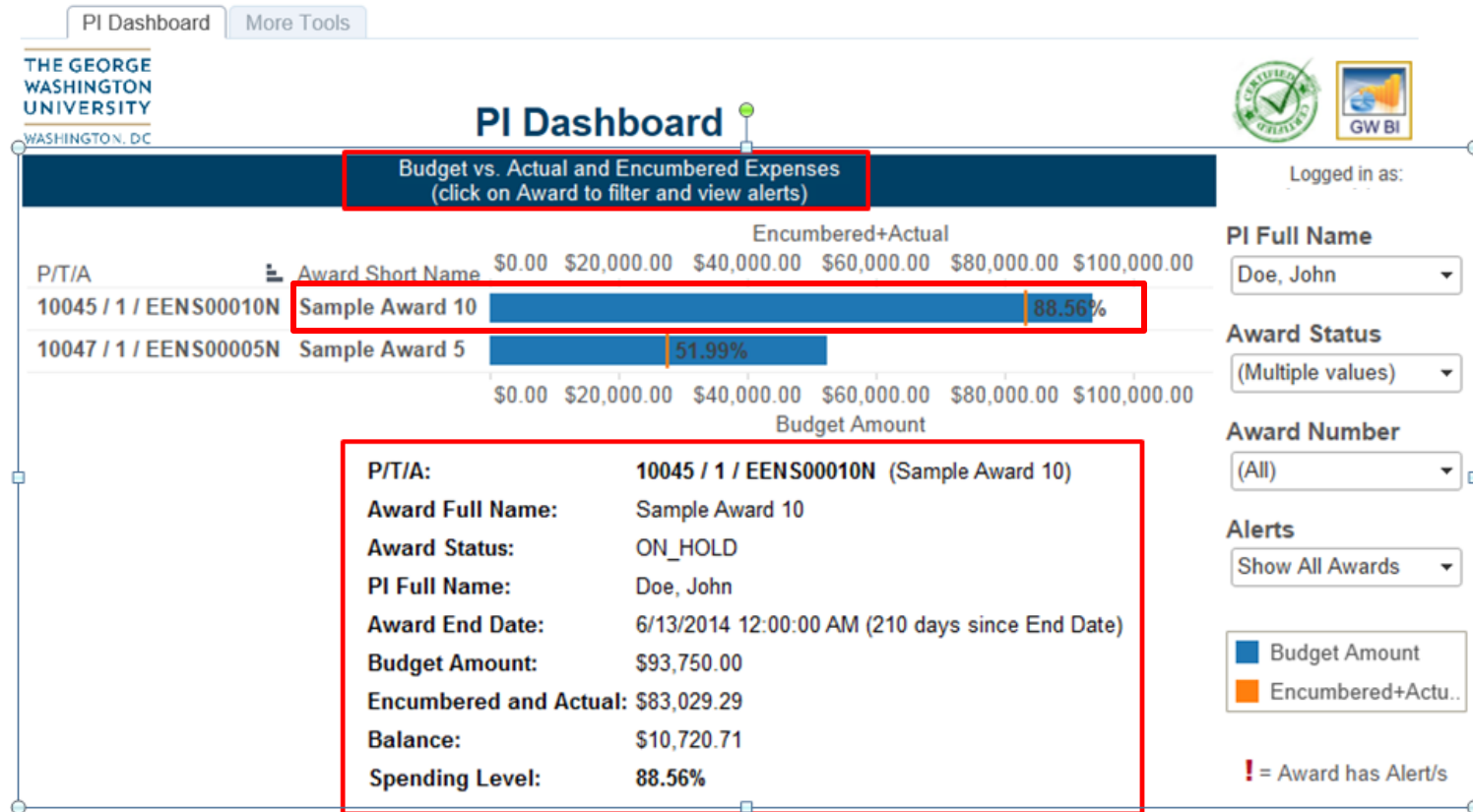
**Tips for using filters: use checkboxes to view multiple choices at a time, then click “Apply”. The All box displays all choices (unchecking it resets that filter).**

[illegible]

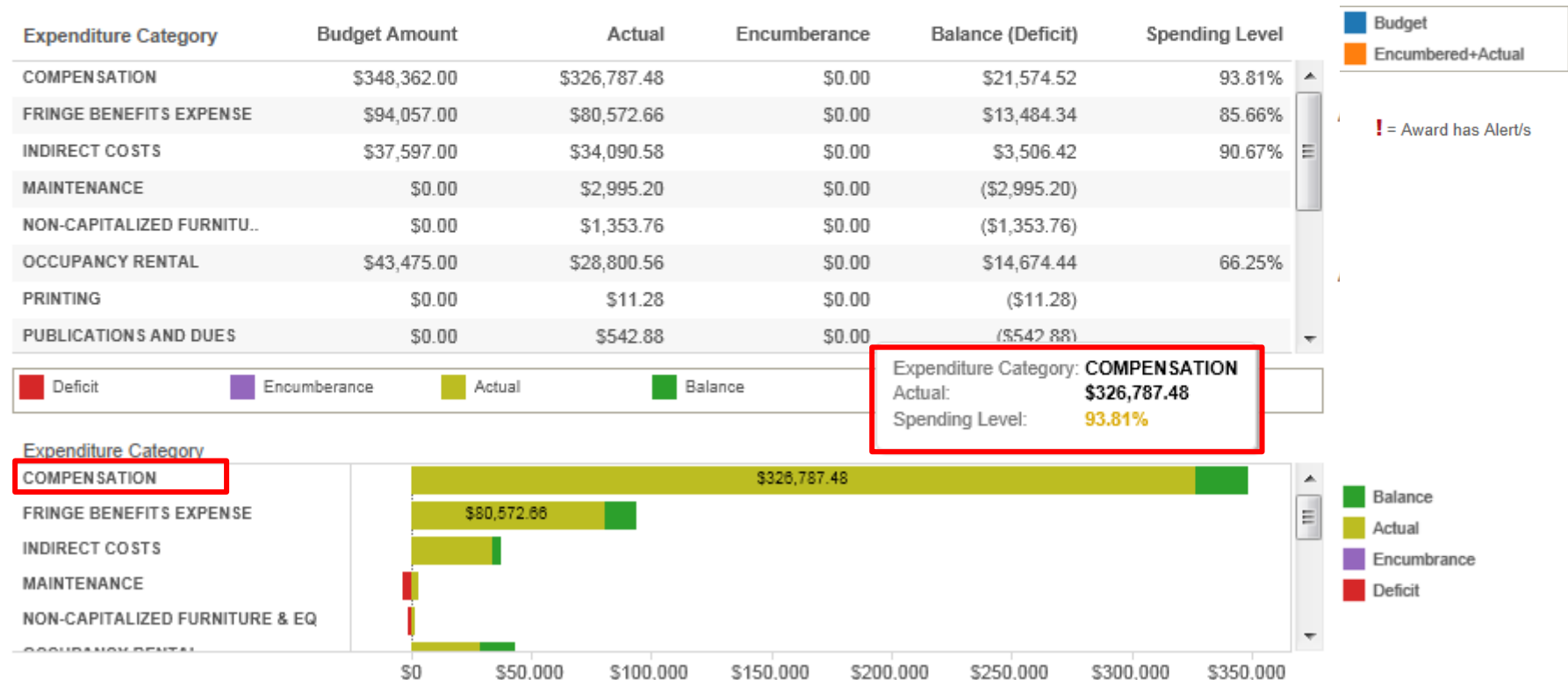
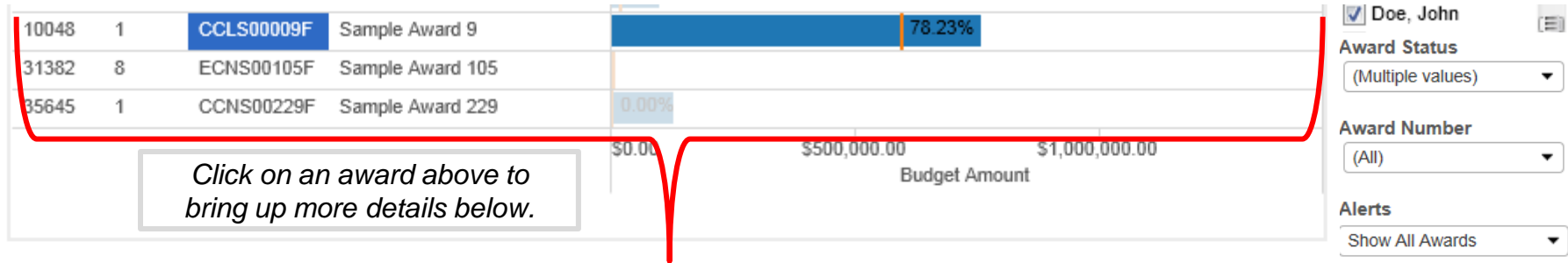
Click on the filter to use the search toolbar. Results appear as you type. Visualizations will automatically adjust to any filter selections.



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.

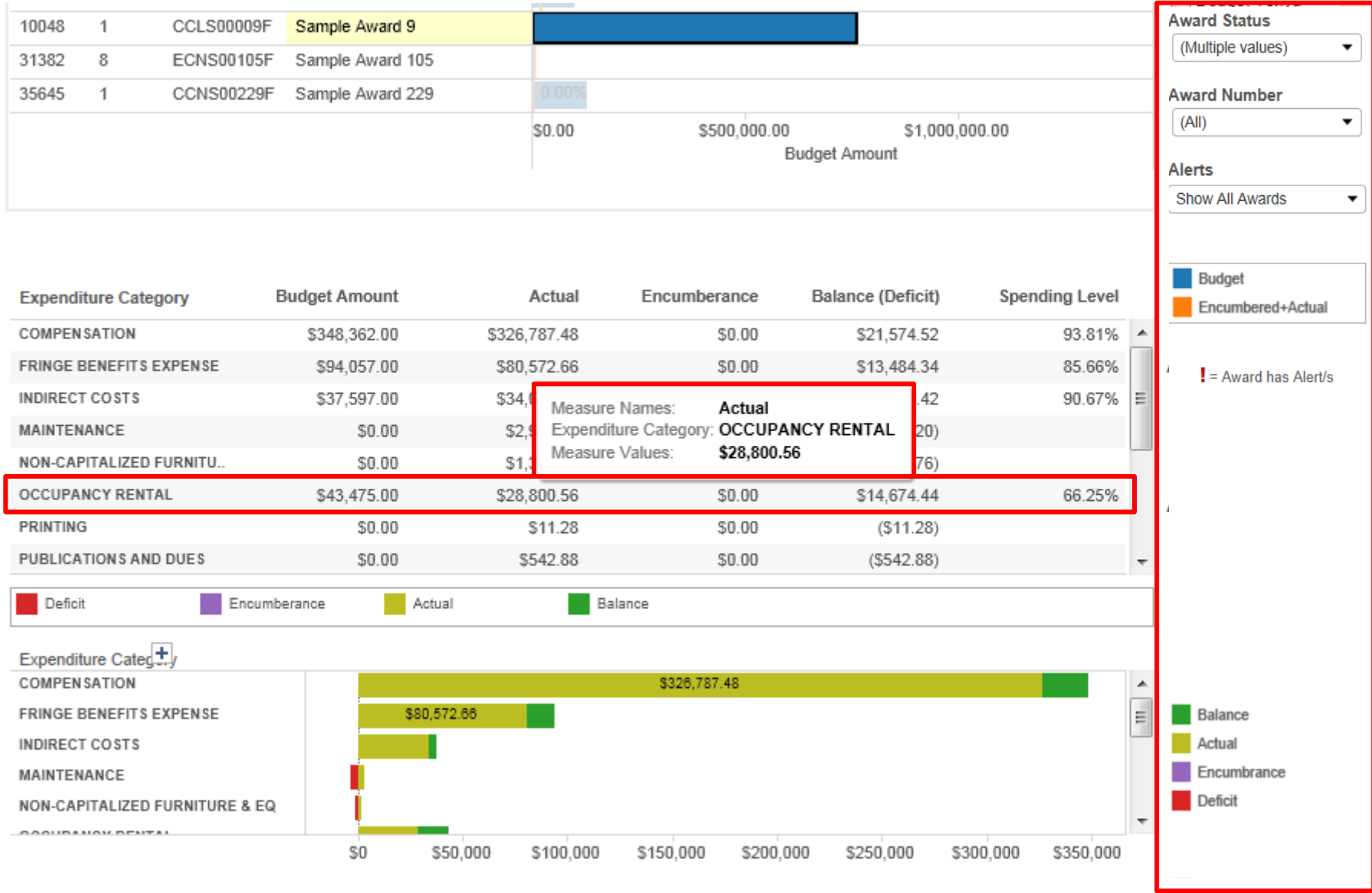


Clicking on an award's bar in the top will bring up more details below. The bar chart is explained with pop-ups, color coding, and a legend.





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.



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

10048	1	CCLS00009F	Sample Award 9	
31382	8	ECNS00105F	Sample Award 105	
35645	1	CCNS00229F	Sample Award 229	0.00%
				<div> <div>\$0.00</div> <div>\$500,000.00</div> <div>\$1,000,000.00</div> </div> <div>Budget Amount</div>

**Award Status**  
(Multiple values) ▼

**Award Number**  
(All) ▼

**Alerts**  
Show All Awards ▼

Expenditure Category	Budget Amount	Actual	Encumbrance	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)	

Budget

Encumbered+Actual

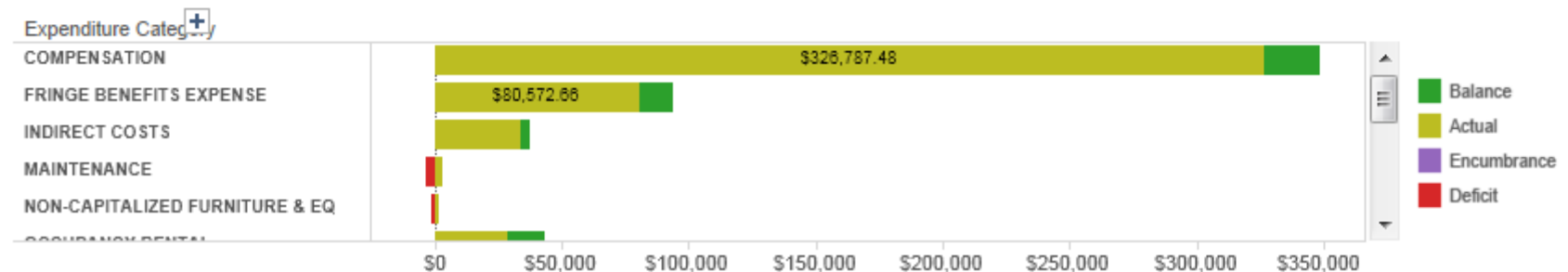
! = Award has Alert/s

Deficit

Encumbrance

Actual

Balance



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

10048	1	CCLS00009F	Sample Award 9	
31382	8	ECNS00105F	Sample Award 105	
35645	1	CCNS00229F	Sample Award 229	0.00%

\$0.00      \$500,000.00      \$1,000,000.00

Budget Amount

Award Status  
(Multiple values) ▼

Award Number  
(All) ▼

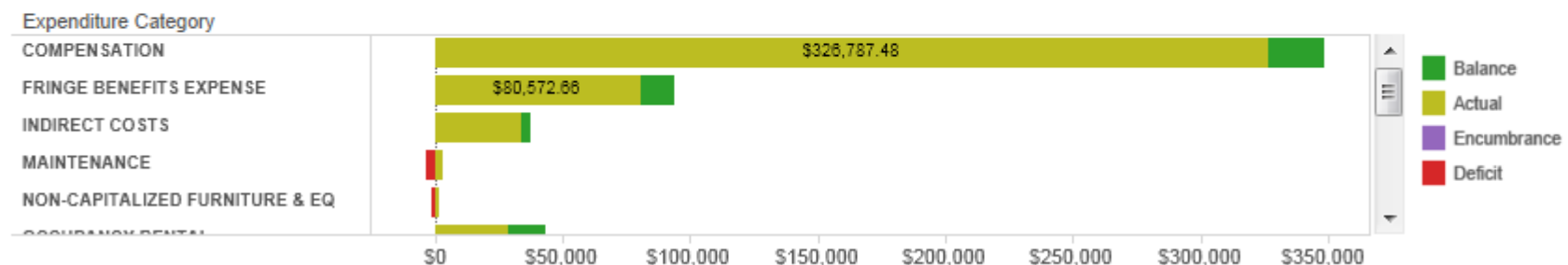
Alerts  
Show All Awards ▼

Expenditure Category	Expenditure Type	Budget Amount	Actual	Encumbrance	Balance (Deficit)	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 NO..		\$1,521.52	\$0.00	(\$1,521.52)	
	SALARY NO..		\$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%


! = Award has Alert/s



■ Budget  
■ Encumbered+Actual





■ Deficit    ■ Encumbrance    ■ Actual    ■ Balance

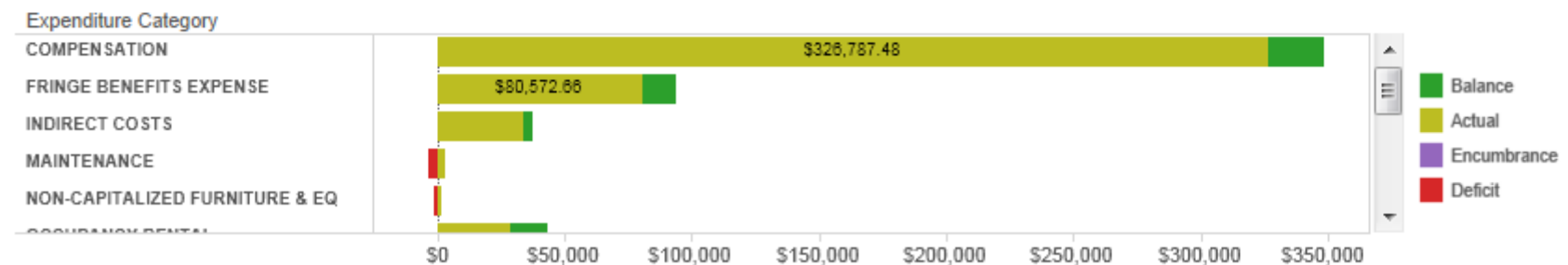


Certain columns can be sorted in ascending and descending order. Rollover a column name to enable its sort icon.


10048	1	CCLS00009F	Sample Award 9		<b>Award Status</b> (Multiple values) ▼  <b>Award Number</b> (All) ▼  <b>Alerts</b> Show All Awards ▼
31382	8	ECNS00105F	Sample Award 105		
35645	1	CCNS00229F	Sample Award 229	0.00%	
				\$0.00      \$500,000.00      \$1,000,000.00 Budget Amount	


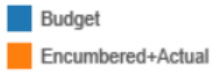
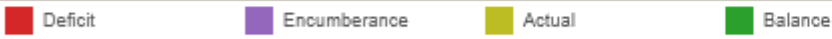
Expenditure Category	Expenditure Type	Budget Amount	Actual	Encumbrance	Balance (Deficit)	Spending Level	
COMPENSATION	HOURLY WA..	\$0.00	\$8,491.33	\$0.00	(\$8,491.33)		 Budget  Encumbered+Actual  ! = Award has Alert/s
	SALARY FAC..	\$53,281.00	\$31,051.65	\$0.00	\$22,229.35	58.28%	
	SALARY FAC..	\$0.00	\$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%	

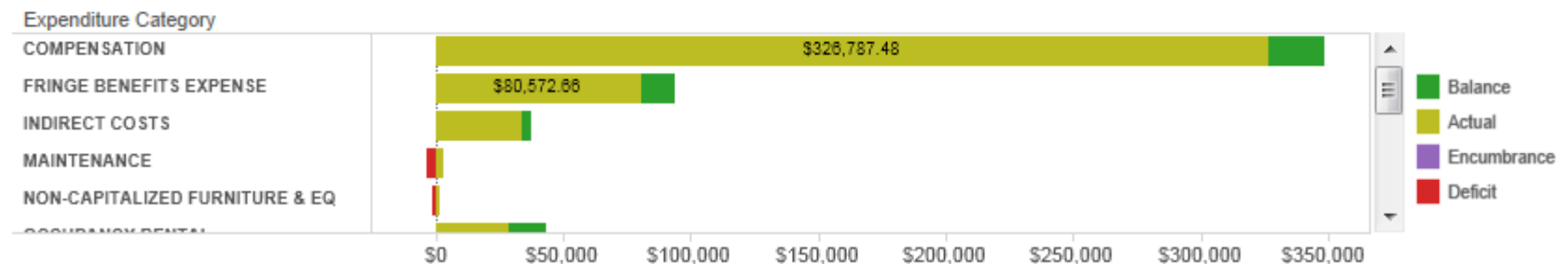
 Deficit   
 Encumbrance   
 Actual   
 Balance



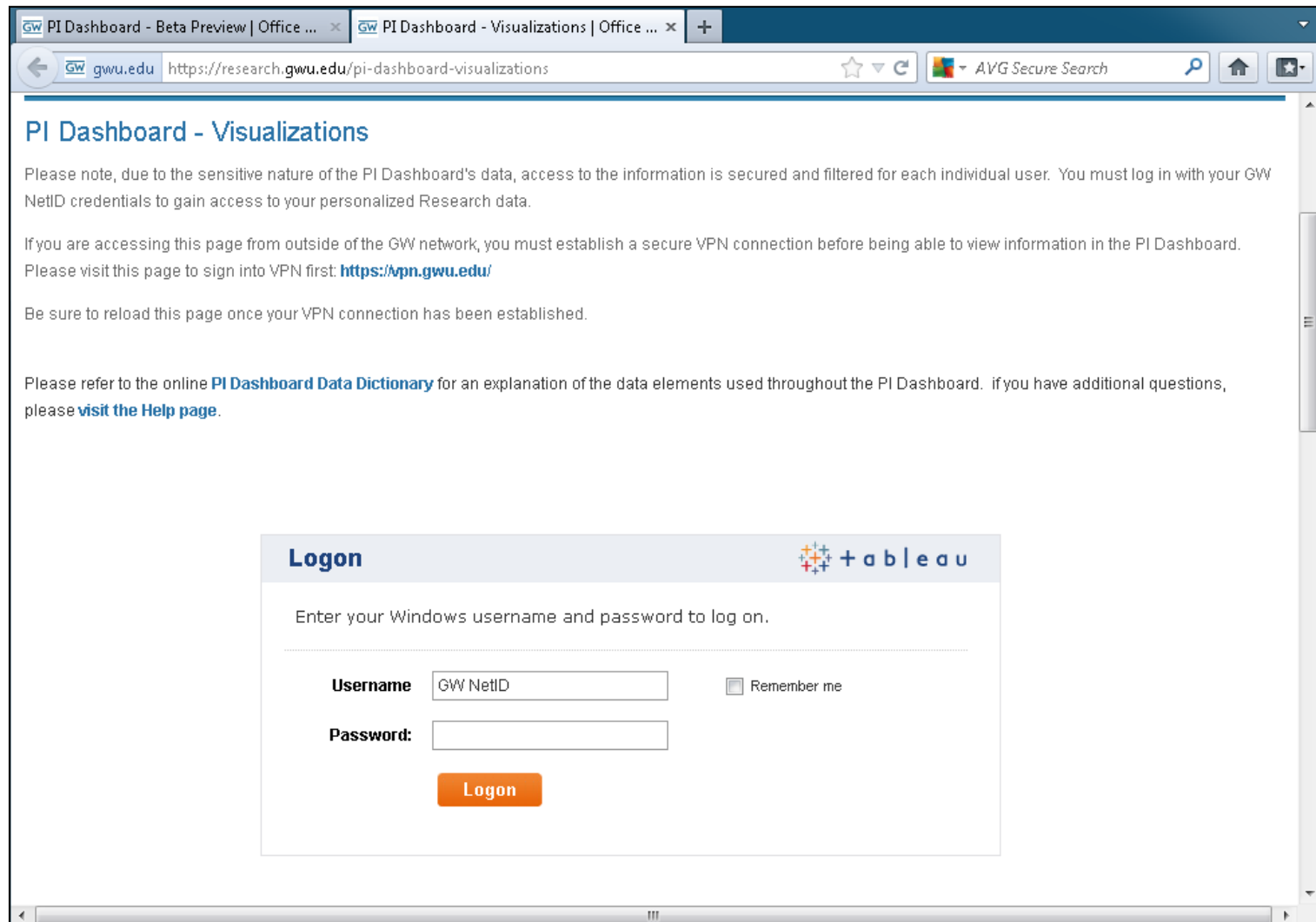
Click the sort icon to sort the table by that column.  
Clicking the icon again will reverse the sorting order.

10048	1	CCLS00009F	Sample Award 9		<b>Award Status</b> (Multiple values) ▼  <b>Award Number</b> (All) ▼  <b>Alerts</b> Show All Awards ▼
31382	8	ECNS00105F	Sample Award 105		
35645	1	CCNS00229F	Sample Award 229	0.00%	
				\$0.00      \$500,000.00      \$1,000,000.00 Budget Amount	

Expenditure Category	Budget Amount	Actual	Encumbrance	Balance (Deficit) 	Spending Level	
STUDENT SUPPORT	\$207,315.00	\$104,193.00	\$0.00	\$103,122.00	50.26%	  ! = Award has Alert/s
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%	
						



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



The screenshot shows a web browser window with two tabs. The active tab is titled "PI Dashboard - Visualizations | Office ...". The address bar shows the URL "https://research.gwu.edu/pi-dash-board-visualizations". The page content includes a title "PI Dashboard - Visualizations", a notice about data security, instructions for VPN access, and a login form. The login form is titled "Logon" and features the Tableau logo. It contains fields for "Username" (with "GW NetID" entered) and "Password", a "Remember me" checkbox, and an orange "Logon" button.


PI Dashboard - Visualizations

Please note, due to the sensitive nature of the PI Dashboard's data, access to the information is secured and filtered for each individual user. You must log in with your GW NetID credentials to gain access to your personalized Research data.

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Be sure to reload this page once your VPN connection has been established.

Please refer to the online [PI Dashboard Data Dictionary](#) for an explanation of the data elements used throughout the PI Dashboard. If you have additional questions, please [visit the Help page](#).

**Logon** 

Enter your Windows username and password to log on.

**Username**  ☐ Remember me

**Password:**

**Logon**

## Please visit online resources for additional help.

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- 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.colibra.com/term/71938e8a-9390-4b0d-9e57-0586cf85549c#!=>