PI Dashboard User Guide

Interactive Visualization

Office of the Vice President for Research
Contact us at pidash@gwu.edu

ACCESSING THE PI DASHBOARD ON-CAMPUS

- To access the PI Dashboard through the University on- campus network, go to: https://sponsoredprojects.gwu.edu/pi-dashboard
- Click the Interactive Visualizations link
- Sign into the Dashboard using your GWNetID (id and password used for email)

ACCESSING THE PI DASHBOARD OFF-CAMPUS

- To access the PI Dashboard when outside of the on-campus network
- First, log into the VPN network using your Net-ID: https://vpn.gwu.edu/
- Then go to: https://sponsoredprojects.gwu.edu/pi-dashboard
- Click the Interactive Visualizations link
- Sign into the Dashboard using your GWNetID (id and password used for email)

# LOGIN SCREEN

SEARCH, FILTER AND SORT

Note: Access to information in PI Dashboard is controlled through your EAS role access. Therefore, you will only see the award(s) you have been given access to.

Once logged into the PI Dashboard, you will see the screen below. From this screen, you can <u>perform a search</u> by Project, Award or Banner Index #.
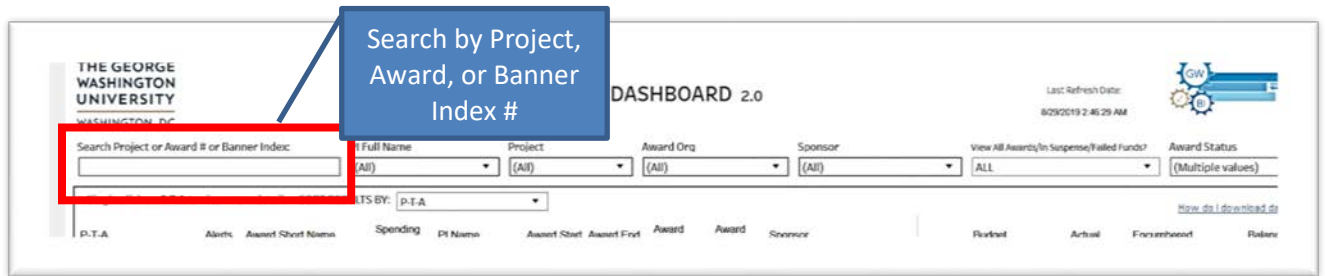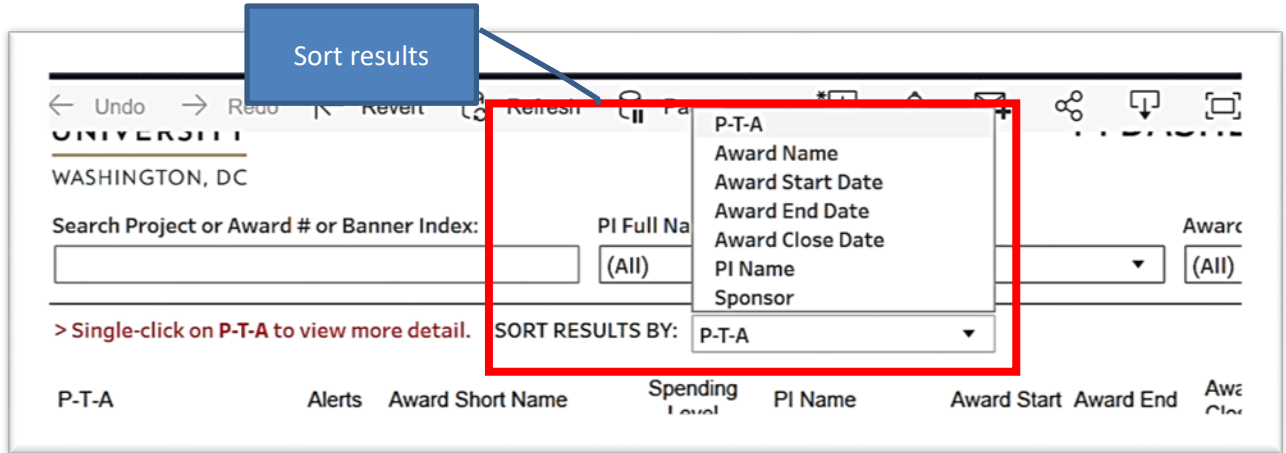

The dashboard has also a filter functionality so that you may <u>filter by</u> PI, Project, Award Organization, Sponsor or Award Status.
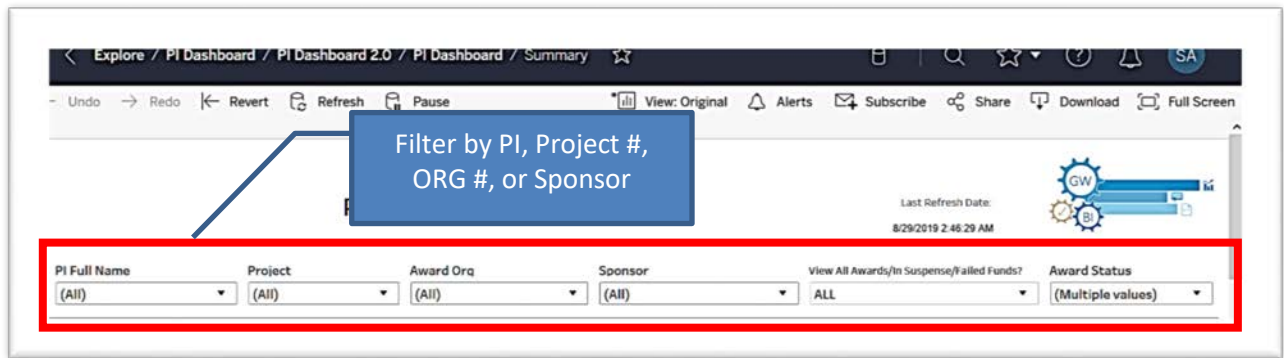
Filtering Tip: When filtering uncheck "(All)" and use the search toolbar. Results appear as you type. Once desired results are shown, check the selection and click "Apply". Use the checkboxes to view multiple choices at a time. Check "(All)" box to reset filter or <u>revert</u> to reset to default.
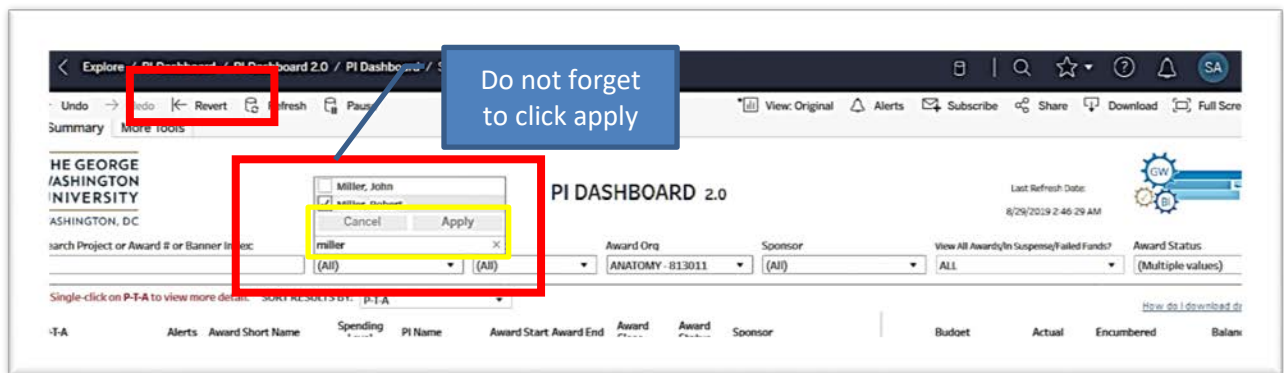
The dashboard lets you sort the results by PTA, Award Name, Award Start/End/Close date, PI Name as well as Sponsor.

Sort results

		P-T-A
		Award Name
		Award Start Date
		Award End Date
		Award Close Date
		PI Name
		Sponsor

UNIVERSITY
WASHINGTON, DC

← Undo → Redo ↰ Revert ↺ Refresh ⫾⫾ Pa

Search Project or Award # or Banner Index: PI Full Na   Award

(All)   ▼   (All)

> Single-click on **P-T-A** to view more detail.   SORT RESULTS BY: P-T-A   ▼

P-T-A   Alerts   Award Short Name   Spending   PI Name   Award Start Award End   Awa
                                                          Level   Clo

DRILL DOWN – AWARD & TRANSACTION DETAILS

From the summary table, you can select to view details about your PTA by clicking on the PTA once. Hover over any of the columns to the right and a pop up will provide you an option to drill down to view actuals, encumbrances, failed funds, and suspense details.

Once the PTA has been selected scroll down to view additional award information.

41038-50-IXXS91063N	!	Sal Cap CTSA2 Yr3 Ad..	83.1%	Miller, R.	6/1/18	5/31/19	7/30/19	ON_HO..	COST SHARING
41125-1-CCNS91576N	!	Convelo LPC	100.0%	Miller, R.	7/1/18	6/30/19	8/29/19	ON_HO..	CONVELO THERAPEUTICS I..
42268-1-EENS91574N		In Vivo Remyelination A..	8.3%	Miller, R.	4/18/19	1/31/20	3/31/20	ACTIVE	BIOGEN INC
42268-2-IXXS91155N		In Vivo Remyelination A..	24.3%	Miller, R.	4/18/19	1/31/20	3/31/20	ACTIVE	COST SHARING
42569-1-EENS91591N		Comet Therapeutics	0.0%	Miller, R.	7/1/19	6/30/20	9/28/20	ACTIVE	COMET THERAPEUTICS, IN..
42569-2-IXXS91202N		C/S Comet Therapeutics	0.0%	Miller, R.	7/1/19	6/30/20	9/28/20	ACTIVE	COST SHARING

36459-1-CCLS90674F
Award Long Name: Dev
Award Org: ANATOMY -
Sponsor: HHS/NATION/
Sponsor Award No.: 5R

In Failed Funds	Suspense Amount
0.00	0.00

P-T-A: **36459-1-CCLS90674F**

View Failed Funds
View Items in Suspense

Pop-up

If the alerts section shows an **"!"** for suspense and/or failed funds roll over the amounts in the box to the right and click on the amounts for details. A pop up to select a report will appear.

Spending Level:
95.83%

Days to End Date: 337
Days to Close Date: 427
Contact SPA: Khoshand, Nasrin
View Personnel

ALERTS	!
Award Ending?	
Budget Exceeded?	
In Suspense?	
Failed Funds?	
Created in last 30 days?	
Funding Modification?	

BUDGET & ACTUALS BY EXPENDITURE CATEGORY TABLE
&
% SPENT VISUALIZATION

The Budget & Actuals by Expenditure Category table as well as the % Spent visualization, provides an option to expand/collapse the expenditure categories to view details by expenditure type. Roll over the column name (e.g. Expenditure Category) and click the expand icon ("+") for details (Expenditure Type).

Click the collapse icon ("-") to collapse details.

To view more information in the budget & actuals by expenditure category table, roll over any columns to view the pop-up window that will provide you an option to drill down into the actual transactions by category.
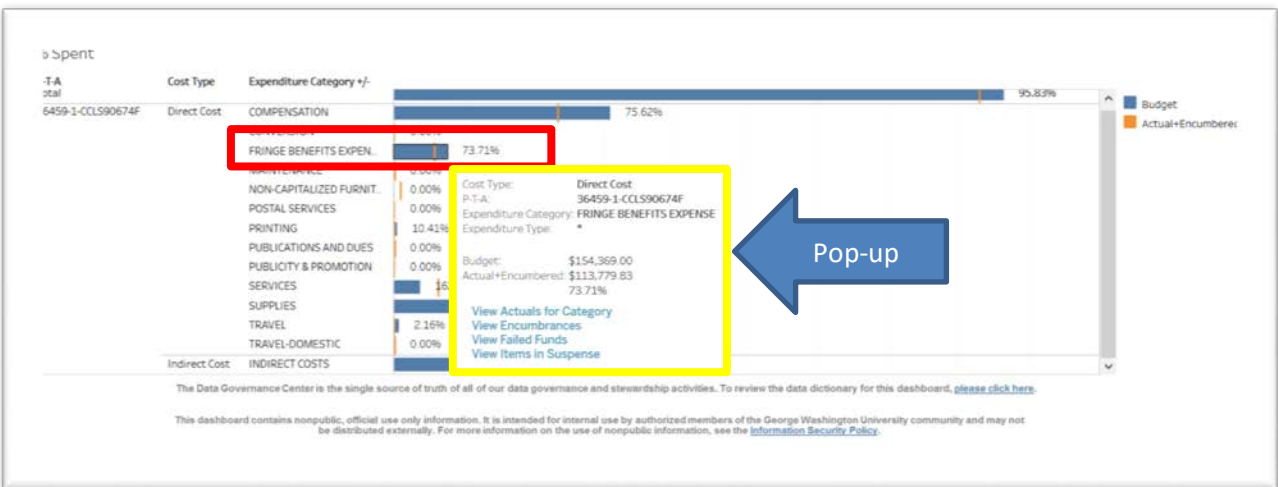

The % spent visualization is an interactive graph. Roll over the bars to view pop-up windows with more detailed information. If your pop-up disappears, simply roll over the bar again.

SELECTING PERIOD ACTUAL (PA) DATES
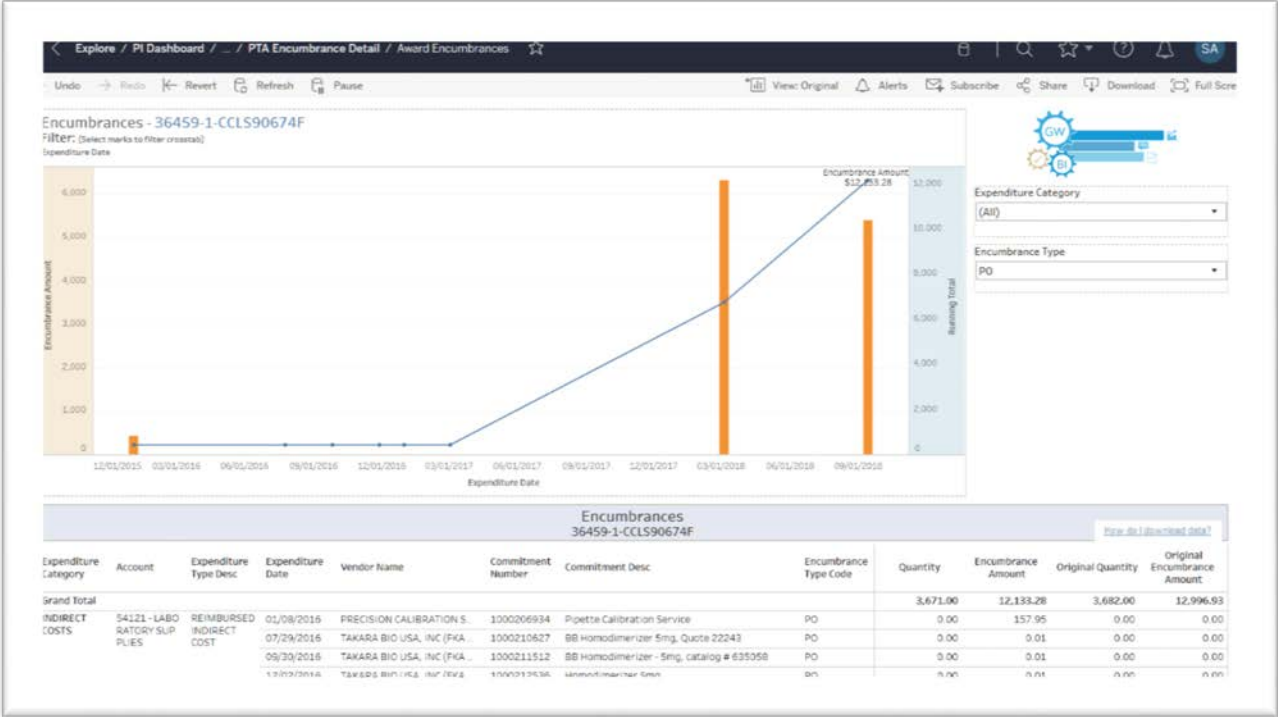
The bar graph shows the spending by period actual posting dates. By default, it shows all expenditures from the start of the project to current. To access a specific period, click on the bar for the specific period. The summary table below the graph will populate the details for the selected period. If interested in seeing more details, scroll down and it will show a table that includes transaction details. To view more than one period, click and drag the mouse to select the desired period or hold down the "ctrl" key and click on the desired periods you want to view.
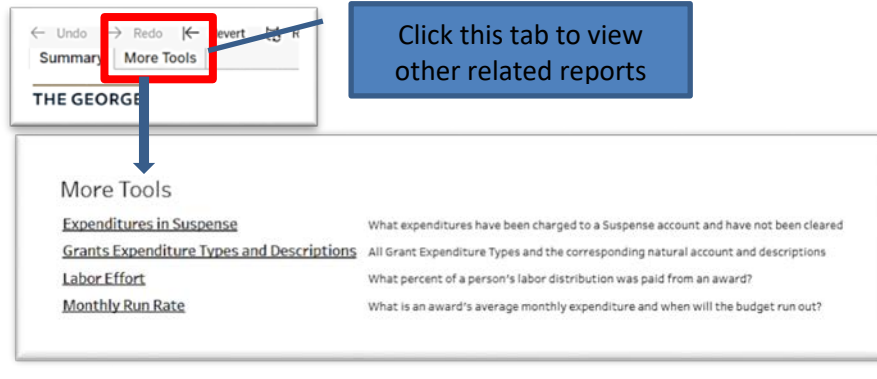
ENCUMBRANCE REPORT

The encumbrance report is navigated the same as the actual expenditures report. The encumbrance report includes details on the original and remaining quantity and amount, as well as the commitment number (purchase order #). Encumbrances can be viewed by expenditure category.

"MORE TOOLS"

Click this tab to view other related reports

More Tools

Expenditures in Suspense — What expenditures have been charged to a Suspense account and have not been cleared
Grants Expenditure Types and Descriptions — All Grant Expenditure Types and the corresponding natural account and descriptions
Labor Effort — What percent of a person's labor distribution was paid from an award?
Monthly Run Rate — What is an award's average monthly expenditure and when will the budget run out?

DATA DOWNLOAD

Data can be downloaded into a csv file by following the instructions here.

DATA DICTIONARY

If not familiar with terms used within the dashboard, please review the Data Dictionary page.