

# **PI Dashboard User Guide**

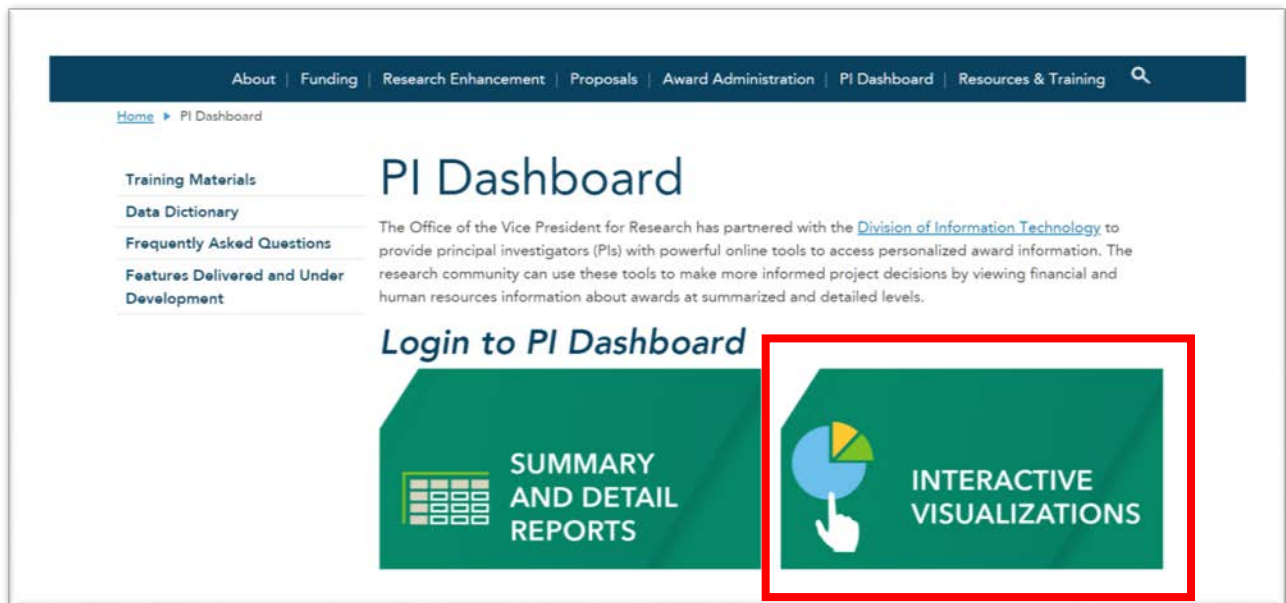
**USING THE SUSPENSE TOOL**

## ACCESSING THE PI DASHBOARD ON-CAMPUS

- To Access the P.I. 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 P.I. 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)



The screenshot shows the PI Dashboard website. At the top is a dark blue navigation bar with links for About, Funding, Research Enhancement, Proposals, Award Administration, PI Dashboard, and Resources & Training. Below the navigation bar is a breadcrumb trail: Home > PI Dashboard. On the left side, there is a sidebar with links for Training Materials, Data Dictionary, Frequently Asked Questions, and Features Delivered and Under Development. The main content area features the title "PI Dashboard" and a paragraph explaining that the Office of the Vice President for Research has partnered with the Division of Information Technology to provide principal investigators (PIs) with powerful online tools to access personalized award information. Below this text is the heading "Login to PI Dashboard" and two large green buttons. The left button is labeled "SUMMARY AND DETAIL REPORTS" and features a grid icon. The right button is labeled "INTERACTIVE VISUALIZATIONS" and features a pie chart icon with a hand cursor pointing at it. This right button is highlighted with a red rectangular border.

Once you are logged into the PI Dashboard, you will see the screen below. From this screen, choose the “More Tools” tab.

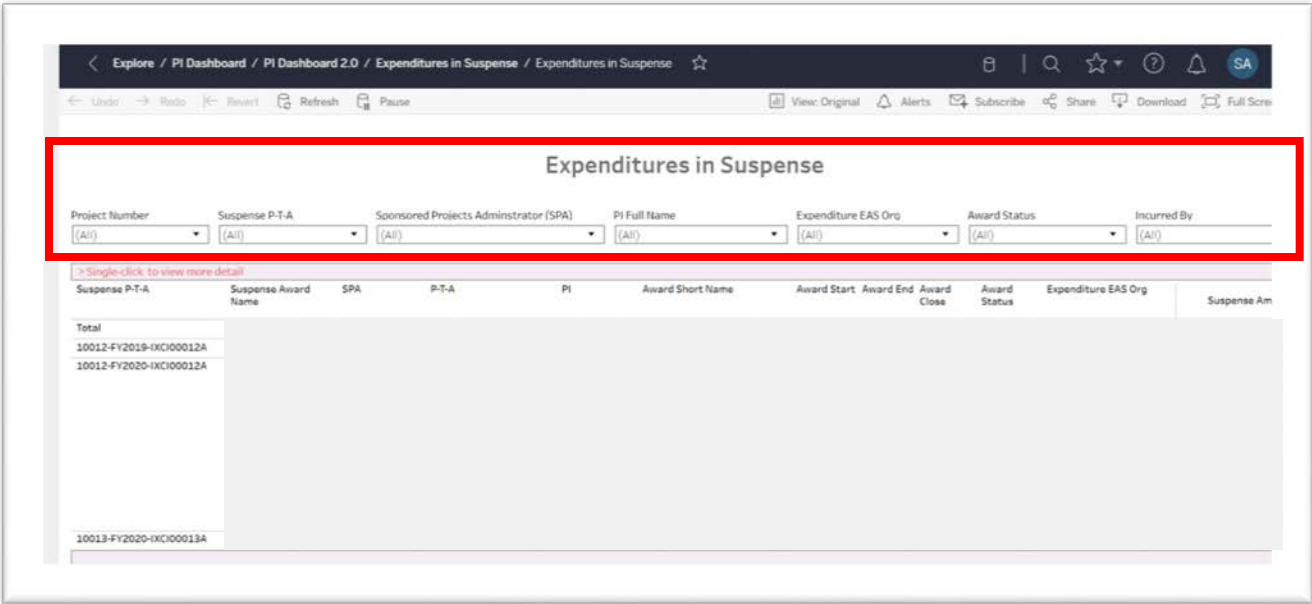
The screenshot shows the PI Dashboard 2.0 interface. At the top, there is a navigation bar with the breadcrumb "Explore / PI Dashboard / PI Dashboard 2.0 / PI Dashboard / Summary" and a user profile "SA". Below the navigation bar is a toolbar with icons for Undo, Redo, Revert, Refresh, and Pause. The "More Tools" tab is highlighted with a red box. Below the toolbar, the dashboard header includes "THE GEORGE WASHINGTON UNIVERSITY" and "WASHINGTON, DC". The main content area features a search bar and several dropdown menus for "PI Full Name", "Project", "Award Org", and "Sponsor", all set to "(All)". A "View All Award" link is also present. Below the search filters, there is a "SORT RESULTS BY:" dropdown menu set to "P-T-A". The main data area is a table with the following columns: P-T-A, Alerts, Award Short Name, Spending Level, PI Name, Award Start, Award End, Award Close, Award Status, Sponsor, and Budget. The table contains six rows of data, all with "ACTIVE" status and "CLEARING ACCOUNT" sponsor.

P-T-A	Alerts	Award Short Name	Spending Level	PI Name	Award Start	Award End	Award Close	Award Status	Sponsor	Budget
10018-1-IXCI00018A		SPHHS Suspense Awa...	Null	Goldman, L.	6/1/95	6/30/20	9/28/20	ACTIVE	CLEARING ACCOUNT	0.00
10018-FY2002-IXCI000...		SPHHS Suspense Awa...	Null	Goldman, L.	6/1/95	6/30/20	9/28/20	ACTIVE	CLEARING ACCOUNT	0.00
10018-FY2003-IXCI000...		SPHHS Suspense Awa...	0.0%	Goldman, L.	6/1/95	6/30/20	9/28/20	ACTIVE	CLEARING ACCOUNT	1.00
10018-FY2004-IXCI000...		SPHHS Suspense Awa...	0.0%	Goldman, L.	6/1/95	6/30/20	9/28/20	ACTIVE	CLEARING ACCOUNT	1.00
10018-FY2005-IXCI000...		SPHHS Suspense Awa...	Null	Goldman, L.	6/1/95	6/30/20	9/28/20	ACTIVE	CLEARING ACCOUNT	0.00
10018-FY2006-IXCI000...		SPHHS Suspense Awa...	Null	Goldman, L.	6/1/95	6/30/20	9/28/20	ACTIVE	CLEARING ACCOUNT	0.00

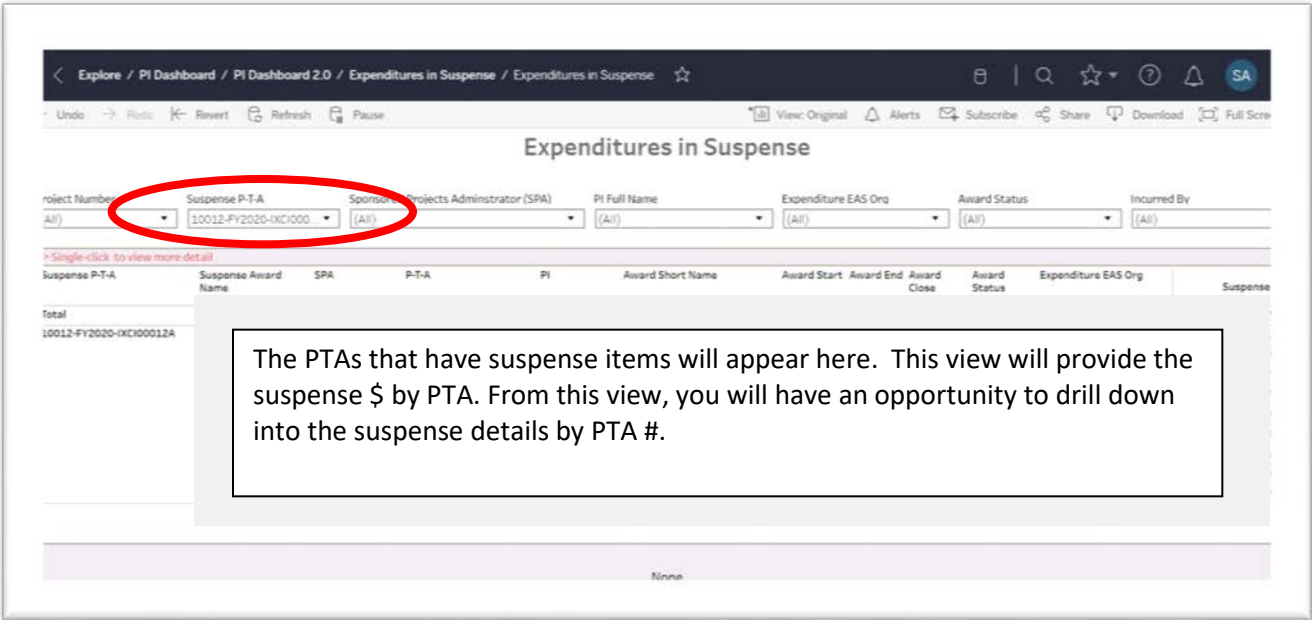
Once the “More Tools” tab is chosen, you will be brought to the screen below. From here, click the “Expenditures in Suspense” button.

The screenshot shows the "More Tools" page in the PI Dashboard. The navigation bar at the top is the same as in the previous screenshot, but the breadcrumb now includes "More Tools". The "More Tools" tab is highlighted with a red box. Below the navigation bar, there are four menu items, each with a description: "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?), and "Monthly Run Rate" (What is an award's average monthly expenditure and when will the budget run out?).

From this page, you will be able to run suspense reports using various criteria: Project Number, Suspense PTA number, SPA, PI Full Name, or Expenditure EAS Organization.



**SAMPLE OUTPUT BY SUSPENSE PTA:**



## SAMPLE OUTPUT BY SELECTED PTA

The screenshot shows a web application interface for 'Expenditures in Suspense'. The browser address bar indicates the path: 'Explore / PI Dashboard / PI Dashboard 2.0 / Expenditures in Suspense / Expenditures in Suspense'. The interface includes a navigation menu with 'Undo', 'Revert', 'Refresh', and 'Pause' options. A toolbar contains 'View: Original', 'Alerts', 'Subscribe', 'Share', 'Download', and 'Full Screen' icons. A table with columns 'Suspense P-T-A', 'Suspense Award', 'SPA', 'P-T-A', 'PI', 'Award Short Name', 'Award Start', 'Award End', 'Award', and 'Expenditure EAS Org' is displayed. A large grey rectangular area obscures the main data rows. A callout box with a black border and white background is overlaid on the table, containing the text: 'Once you select the PTA details on all suspense items on the selected PTA will appear.' The callout box is positioned over the 'Grand Total' row of the table, which shows 'Grand Total' and '10012-FY2020-IXCI00012A'.

Suspense P-T-A	Suspense Award	SPA	P-T-A	PI	Award Short Name	Award Start	Award End	Award	Expenditure EAS Org
Total									
10012-FY2020-IXCI0001:									
10012-FY2020-IXCI00012A									
Suspense P-T-A									
Grand Total									
10012-FY2020-IXCI00012A									

Data can be downloaded into a csv file by following the instructions [here](#).