

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

Home > PI Dashboard

Training Materials
Data Dictionary
Frequently Asked Questions
Features Delivered and Under Development

PI Dashboard

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. 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.

Login to PI Dashboard

SUMMARY AND DETAIL REPORTS

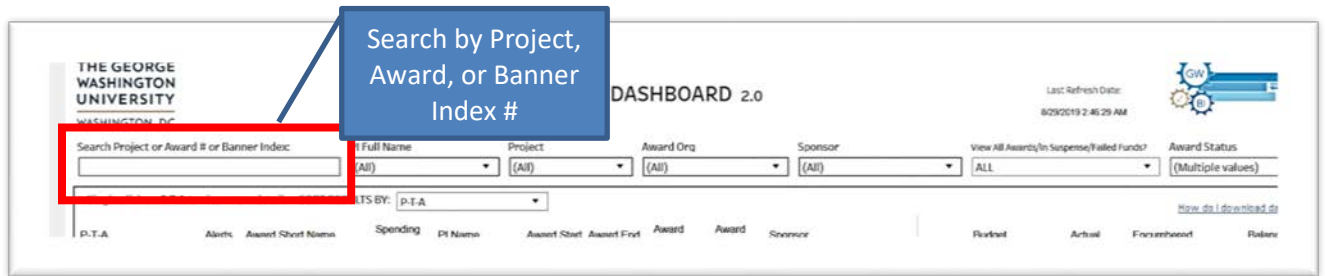
INTERACTIVE VISUALIZATIONS

Click Image to Login

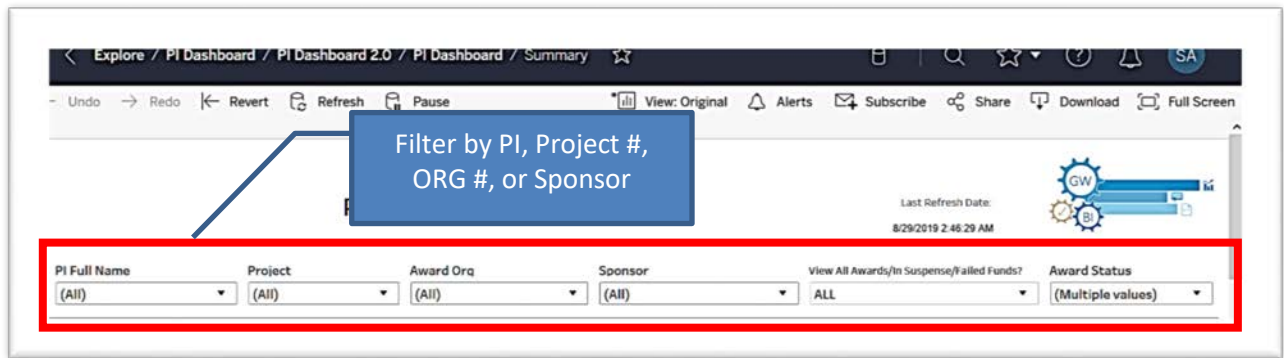
SEARCH, FILTER AND SORT

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.

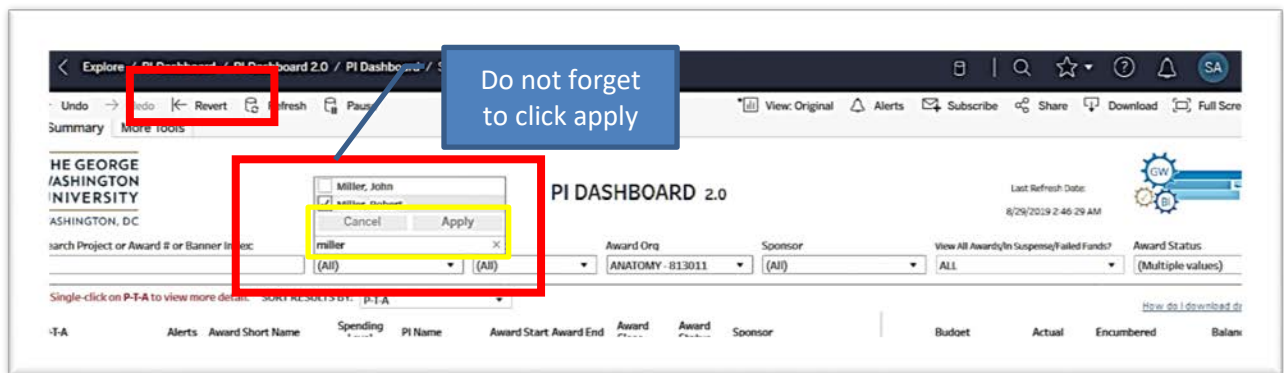
Once logged into the PI Dashboard, you will see the screen below. From this screen, you can perform a search by Project, Award or Banner Index #.



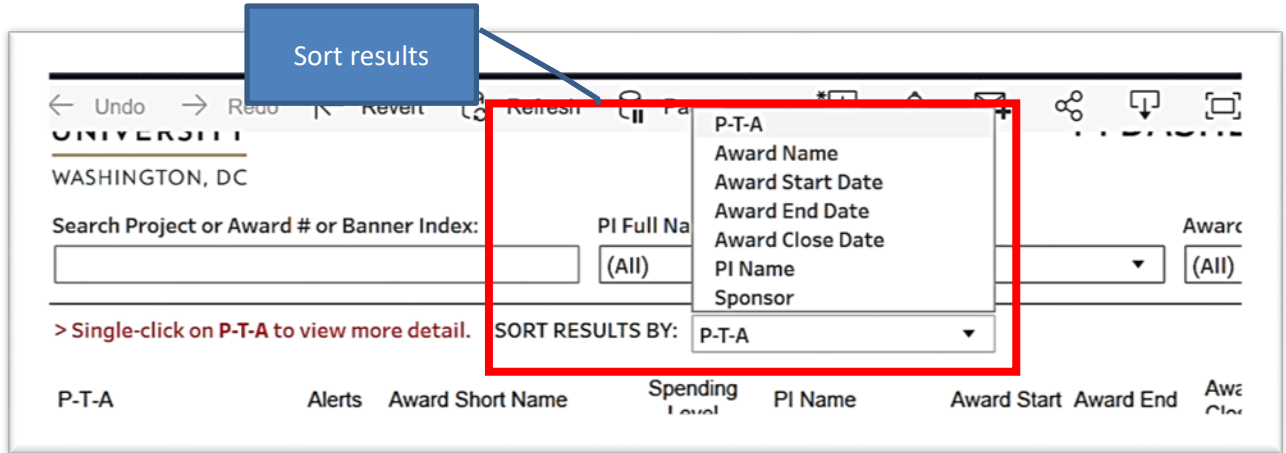
The dashboard has also a filter functionality so that you may filter by PI, Project, Award Organization, Sponsor or Award Status.



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 revert 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.



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.

Click only once

PI DASHBOARD 2.0

Last Refresh Date: 8/26/2019 2:46:29 AM

Filter Indec: Miller, Robert | Project: (All) | Award Org: ANATOMY - 813011 | Sponsor: (All) | View All Awards/In Suspense/Failed Funds?: All | Award Status: (Multiple values)

PTA ID	Award Short Name	Spending Level	PI Name	Award Start	Award End	Award Close	Award Status	Sponsor	Budget	Actual	Encumbered	Balance
36459-1-CCLS90674F	Dev. of Oligodendrocyt...	95.8%	Miller, R.	9/30/14	7/31/20	10/29/20	ACTIVE	NATIONAL INST...	1,733,794.52	1,649,379.88	12,133.28	72,271.3
36459-50-DOOS90665H	Dev. of Oligodendrocyt...	97.2%	Miller, R.	9/30/14	7/31/20	10/29/20	ACTIVE	NATIONAL INST...	347.0	0.00	0.00	9,660.5
37865-1-CCNS91184F	Role of Miconazole	92.1%	Miller, R.	9/15/15	8/31/19	10/31/19	ACTIVE	NATIONAL INST...	479.6	0.00	0.00	38,129.5
37865-50-DOOS90809N	Sal Cap Role of Miconaz...	99.4%	Miller, R.	9/15/15	8/31/19	10/31/19	ACTIVE	NATIONAL INST...	131.4	0.00	0.00	742.5
41038-1-CCNS91538F	CTSA2 Yr3 Admin	98.2%	Miller, R.	6/1/18	5/31/19	7/30/19	ACTIVE	NATIONAL INST...	76.2	0.00	0.00	1,358.3
41038-4-DOOS91065N	CS CTSA2 Yr3 Admin	98.9%	Miller, R.	6/1/18	5/31/19	7/30/19	ACTIVE	NATIONAL INST...	47.8	0.00	0.00	534.8
41038-50-DOOS91063N	Sal Cap CTSA2 Yr3 Ad...	83.1%	Miller, R.	6/1/18	5/31/19	7/30/19	ON_HO...	NATIONAL INST...	81.9	0.00	0.00	13,872.8
41125-1-CCNS91576N	Convelo LPC	100.0%	Miller, R.	7/1/18	6/30/19	8/29/19	ON_HO...	NATIONAL INST...				

Select report

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

6459-1-CCLS90674F Miller, Robert

ward Long Name: Development of Oligodendrocytes in the Spinal Cord

ward Org: ANATOMY - 813011

sponsor: HHS/NATIONAL INSTITUTES OF HEALTH-LOC

sponsor Award No.: SRD1NS030800-22

Award Type: Grant - SEFA

IDC Schedule: MC per agreement dated 06/2011

Allowed Cost Schedule: MTDC - A21 Allowable-ON

Prime Sponsor: n/a

In Failed Funds: 0.00

Suspense Amount: 0.00

Spending Level: 95.83%

Days to End Date: 337

Contact SPA: Khoshand, Nasrin

[View Personnel](#)

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

Award alerts and notifications

Click "View Personnel" to view all personnel that have access to the award

Explore / PI Dashboard / PI Dashboard 2.0 / PI Dashboard / Summary

Undo Redo Revert Refresh Pause View: Original Alerts Subscribe Share Download Full Screen

PI ID	PI Name	Progress	PI Director	Start Date	End Date	Status	Category	In Failed Funds	Suspense Amount
41038-50-DOCS91063N	Sal Cap CTS&Z Yr3 Ad...	83.1%	Miller, R.	6/1/18	5/31/19	7/30/19	ON_HO.. COST SHARING	81,953.00	68,130.16
41125-1-CCNS91576N	Corvelo LPC	100.0%	Miller, R.	7/1/18	6/30/19	8/29/19	ON_HO.. CONVELO THERAPEUTICS L...	115,370.00	115,369.85
42268-1-EENS91574N	In Vivo Remyelination A...	8.3%	Miller, R.	4/18/19	1/31/20	3/31/20	ACTIVE BIOGEN INC	150,000.18	12,513.66
42268-2-DOCS91155N	In Vivo Remyelination A...	24.3%	Miller, R.	4/18/19	1/31/20	3/31/20	ACTIVE COST SHARING	31,857.00	7,747.95
42569-1-EENS91591N	Comet Therapeutics	0.0%	Miller, R.	7/1/19	6/30/20	9/28/20	ACTIVE COMET THERAPEUTICS, IN...	4,183.49	0.00
42569-2-DOCS91202N	C/S Comet Therapeutics	0.0%	Miller, R.	7/1/19	6/30/20	9/28/20	ACTIVE COST SHARING	12,922.00	0.00

36459-1-CCL590674F
Award Long Name: Dev
Award Org: ANATOMY
Sponsor: HHS/NATION
Sponsor Award No.: SR

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?	

In Failed Funds: 0.00
Suspense Amount: 0.00

P-T-A: 36459-1-CCL590674F
[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.

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).

Spending Level: 95.83%

Days to Close Date: 427
Contact SPA: Khoshand, Nasrin
[View Personnel](#)

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

Budget & Actuals by Expenditure Category
Click +/- on Expenditure Category to see/hide Expenditure Type

TA	Cost Type	Expenditure Category +/-	Budget	Cumulative Actual	Cumulative Encumbrance	Balance	In Failed Funds	Suspense Amount
	FRINGE BENEFITS EXPENSE		154,369.00	113,779.83	0.00	40,589.17	0.00	0.00
	MAINTENANCE		0.00	2,679.00	0.00	(2,679.00)	0.00	0.00
	NON-CAPITALIZED FURNITURE		0.00	18,143.85	0.00	(18,143.85)	0.00	0.00
	OTHER		0.00	888.87	0.00	(888.87)	0.00	0.00

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

Spending Level: 95.83%

Days to Close Date: 427
Contact SPA: Khoshand, Nasrin
[View Personnel](#)

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

Budget & Actuals by Expenditure Category
Click +/- on Expenditure Category to see/hide Expenditure Type

TA	Cost Type	Expenditure Category +/-	Expenditure Type	Budget	Cumulative Actual	Cumulative Encumbrance	Balance	In Failed Funds	Suspense Amount
			SALARY NONFACULTY REG FT	430,766.00	270,957.71	0.00	159,808.29	0.00	0.00
			STUDENT WAGE NON FED WK STU.	0.00	2,280.00	0.00	(2,280.00)	0.00	0.00
			Total	616,661.00	466,318.46	0.00	150,342.54	0.00	0.00
	CONVERSION		PUBLICATION REIMBURSEMENTS	0.00	0.00	0.00	0.00	0.00	0.00
			Total	0.00	0.00	0.00	0.00	0.00	0.00
	FRINGE BENEFITS EXPENSE		FRINGE-REGULAR	154,369.00	113,072.12	0.00	41,296.88	0.00	0.00
			FRINGE-TEMPORARY	0.00	707.71	0.00	(707.71)	0.00	0.00
			Total	154,369.00	113,779.83	0.00	40,589.17	0.00	0.00
	MAINTENANCE		GENERAL EQUIPMENT MAINTENAN.	0.00	2,679.00	0.00	(2,679.00)	0.00	0.00

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.

Budget & Actuals by Expenditure Category

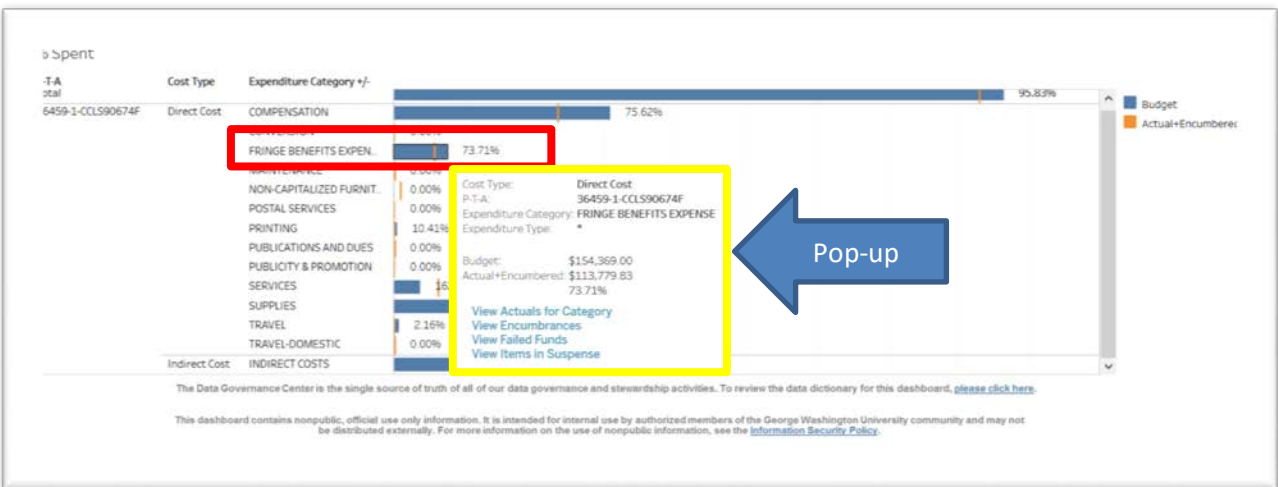
Click +/- on Expenditure Category to see/hide Expenditure Type

P-T-A	Cost Type	Expenditure Category +/-	Budget	Cumulative Actual	Cumulative Encumbrance	Balance	In Failed Funds	Suspense Amount
36459-1-CCL590674F	Direct Cost	COMPENSATION	616,661.00	466,318.46	0.00	150,342.54	0.00	0.00
		FRINGE BENEFITS EXPENSE	154,369.00	113,800.17	0.00	40,568.83	0.00	0.00
		MAINTENANCE	0.00	0.00	0.00	0.00	0.00	0.00
		NON-CAPITALIZED FURNIT.	0.00	0.00	0.00	0.00	0.00	0.00
		POSTAL SERVICES	0.00	0.00	0.00	0.00	0.00	0.00
		PRINTING	11,000.00	0.00	0.00	9,855.00	0.00	0.00
		PUBLICATIONS AND DUES	0.00	0.00	0.00	(1,559.06)	0.00	0.00
		PUBLICITY & PROMOTION	0.00	0.00	0.00	(396.23)	0.00	0.00
		SERVICES	78,000.00	126,452.65	0.00	(48,452.65)	0.00	0.00
		SUPPLIES	216,791.00	307,529.63	7,655.05	(98,393.68)	0.00	0.00
		TOTAL	1,174,502.00	964,318.46	7,655.05	16,681.00	0.00	0.00

Pop-up window for COMPENSATION:

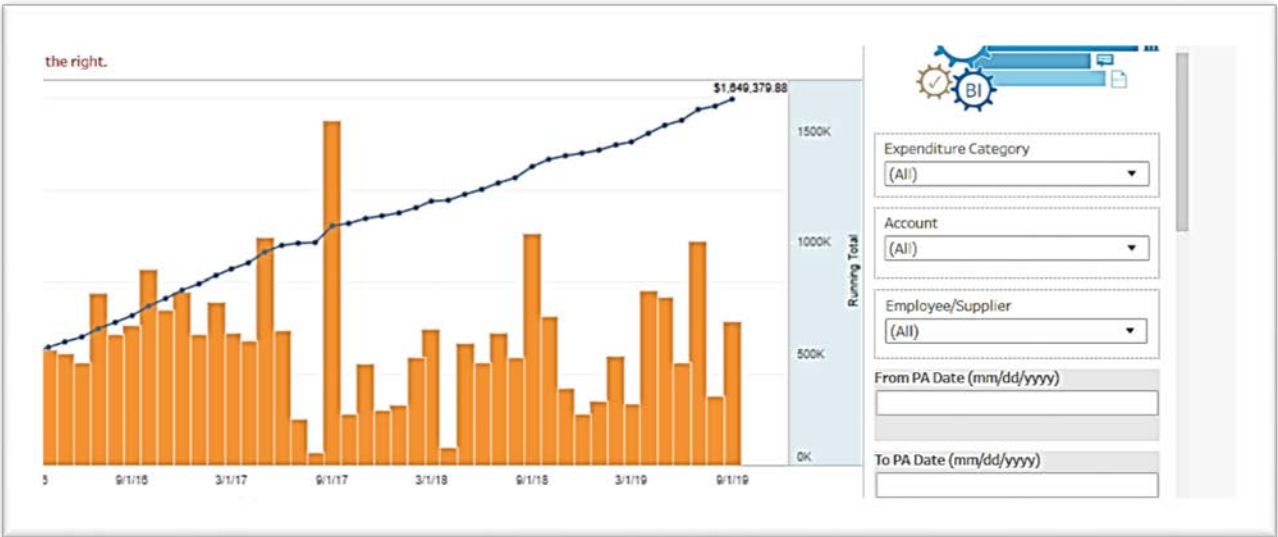
- Cost Type: Direct Cost
- P-T-A: 36459-1-CCL590674F
- Expenditure Category: COMPENSATION
- Budget: 616,661.00
- View Actuals for Category
- View Encumbrances
- View Failed Funds
- View Items in Suspense

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

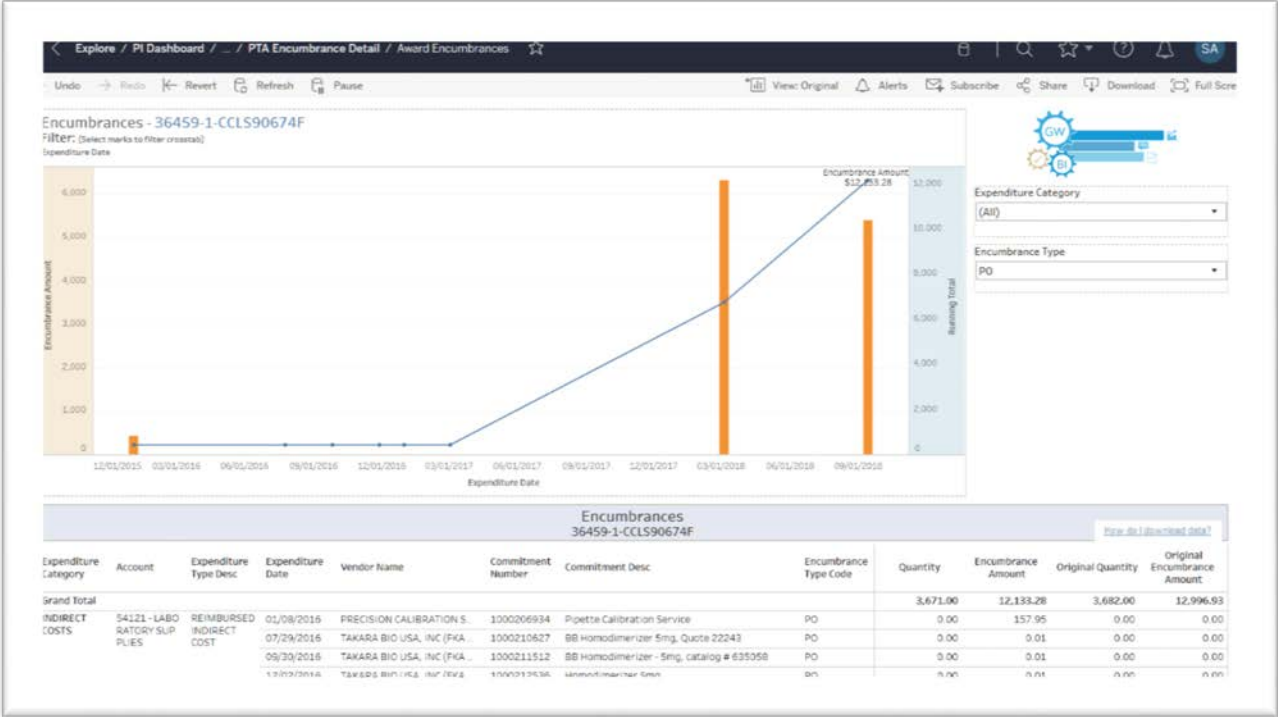
The bar graph shows the spending by period actual posting dates. By default, it shows all expenditures from the start of the project to current. To access a specific period, click on the bar for the specific period. The summary table below the graph will populate the details for the selected period. 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.



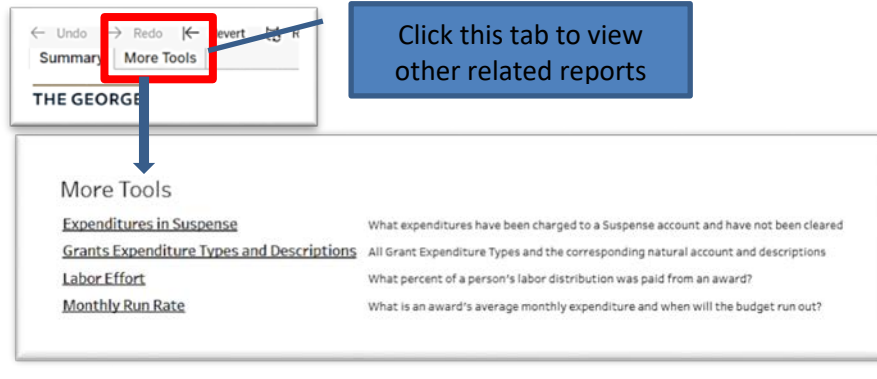
Actual Expenditures										
35459-1-CCL590674F										
P-T-A	Expenditure Category	Expenditure Type	PA Date	Expenditure Date	Expenditure Comment	Employee/Supplier	Passed Funds Check	Batch Number	Supplier Invoice Number	Actual Amt
	NON CAPITALIZED FURNITURE & EQ	NON CAP INSTRCT LAB EQUIP								10,329.19
		NONCAP COMPUTING EQUIP								2,582.98
	POSTAL SERVICES	POSTAGE/EXPRESS MAIL - NON GW	07/31/2018	08/10/2018	PCARD/FEDEX 28508266/FEDEX SH...	BRENNIA K BOND	Y	AP-1363000V11363001	252095	25.59
			10/31/2018	08/31/2018	PCARD/FEDEX 29781827/ANATOMY...	BRENNIA K BOND	Y	AP-1440019V11440020	270822	38.65
			08/31/2019	05/03/2019	PCARD/FEDEX 32764596/POSTAGE F...	BRENNIA K BOND	Y	AP-1744121V11744122	320270	4.63
	PUBLICATIONS AND DUES	BOOKS	05/31/2018	03/26/2018	PCARD/INTERNATIONAL TRANSACTI...	SANDRA FOSTER	Y	AP-1304000V11304001	240360	15.44
	PUBLICITY & PROMOTION SERVICES	ADVERTISING								396.23
		ANIMAL RESEARCH	08/31/2018	08/03/2018	SERVICES - BB Homodamericrchemi...	TAKARA BIO USA	Y	AP-1392999V11393000	713756	396.23
		FACS CORE FACILITY								818.75
		NANOFABIMAGING CNTR CORE FACI								1,087.00
	SUPPLIES	LABORATORY SUPPLIES								106,385.60
		LABORATORY SUPPLIES - ANIMALS								11,817.49

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”



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.