Job Aid: Faculty Financial Summary (Faculty Version)

Purpose:
The Faculty Financial Summary is a dashboard in EBI created to allow faculty to access their complete sponsored and non-sponsored portfolio on-demand. The Faculty Financial Summary is intended to serve as an “online bank account” style view of a faculty member’s portfolio, providing current balances based on expenses that have already occurred.

Where can I find the Faculty Financial Summary?
1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards menu in the upper right
3. Faculty Financial Summary appears in the All Emory folder
Job Aid: Faculty Financial Summary (Faculty Version) – cont’d

How does the Faculty Financial Summary work?

1. Prompts are not used for the Faculty Financial Summary
   a. The Emory NETID is inherited upon login to EBI
   b. Upon navigation to the Dashboard, if a faculty member has been assigned responsibility for any projects, their name will automatically populate at the top of the page and begin to run the dashboard
   c. If data does not populate for the faculty member, their portfolio has not been assigned.
      i. Note: EBI is working with units/departments to collect roles assignments based on a pre-determined rollout schedule. If you feel that you should have been assigned responsibility for a portfolio, please work with your department/unit support staff to ensure that roles are assigned appropriately.

2. Content included in the report:
   a. The portfolio for the faculty member is comprised of Awards and projects based on roles assigned.
      i. Sponsored Projects
         1. Award PI is pulled directly from Compass
         2. Project PI has been assigned by RAS unit supporting the Award
      ii. Non-Sponsored Projects
         1. Faculty are assigned by department in which the project resides
Job Aid: Faculty Financial Summary (Faculty Version) – cont’d

How does the Faculty Financial Summary work? (cont’d)

b. Each section contains a row of performance tiles accompanied by a tabular report
   i. Performance Tiles – high level indicators. Faculty can click on a performance tile to drill
to details

   ![Performance Tiles](image)

   ![Tabular Reports](image)

   ![View Selectors](image)

ii. Tabular Reports – more detailed information related to the section’s content.

<table>
<thead>
<tr>
<th>Project</th>
<th>Project Begin Date</th>
<th>Project End Date</th>
<th>PI Name</th>
<th>Award</th>
<th>Award Principal Investigator</th>
<th>Award Begin Date</th>
<th>Award End Date</th>
<th>Budget ($)</th>
<th>Expenses ($)</th>
<th>Encumbrance ($)</th>
<th>Balance ($)</th>
<th>Active Projects Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>00611.160 - CFAR Core A ADMIN (Territory)</td>
<td>08/01/16</td>
<td>07/31/18</td>
<td>96.00</td>
<td>00000038/23 - Center for AIDS Research at En</td>
<td>01/12/2016 - Del Rio Centers</td>
<td>08/24/2016</td>
<td>07/31/18</td>
<td>39,284.58</td>
<td>33,190.48</td>
<td>0.00</td>
<td>6,178.37</td>
<td>6,178.37</td>
</tr>
<tr>
<td>0117.170 - CFAR Core A ADMIN (Yerkes)</td>
<td>08/01/17</td>
<td>07/31/17</td>
<td>96.00</td>
<td>00000038/23 - Center for AIDS Research at En</td>
<td>01/12/2012 - Del Rio Centers</td>
<td>08/01/2012</td>
<td>07/31/17</td>
<td>149,695.09</td>
<td>142,105.15</td>
<td>0.00</td>
<td>3,587.85</td>
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<td>Grand Total</td>
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<td>184,977.85</td>
<td>175,294.63</td>
<td>0.00</td>
<td>9,683.22</td>
<td>9,683.22</td>
</tr>
</tbody>
</table>

iii. View Selectors – drop down menus that allow users to select different views of the data
     (available on tabular reports)

   ![Select View Here](image)

How can I set the Faculty Financial Summary to be my home screen when I log in to EBI?

Setting the Faculty Financial Summary as your home screen in EBI means that when you log in to EBI, the
Dashboard will appear automatically, without the need to navigate to the Dashboard via the menu.

1. Click on your name in the upper right-hand corner of EBI, then click My Account

![My Account](image)
2. On the preferences tab of the dialogue box, click on the drop-down menu next to “Starting Page”
3. From the drop-down menu, select All Emory: Faculty Financial Summary and click OK

Need additional help?

- For additional assistance please contact EBI via the Financial Support Center.
  - Choose Emory Business Intelligence (EBI)/Reporting as your ticket category
- Visit the faculty-centered Faculty Financial Summary website
- View our recorded training video
- For detailed instructions on customization options, please view the Staff Version of the Faculty Financial Summary Job Aid.