



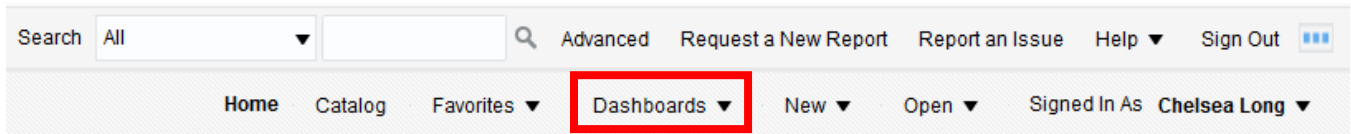
Job Aid: Faculty Financial Summary (Faculty Version)

What is the Faculty Financial Summary dashboard?

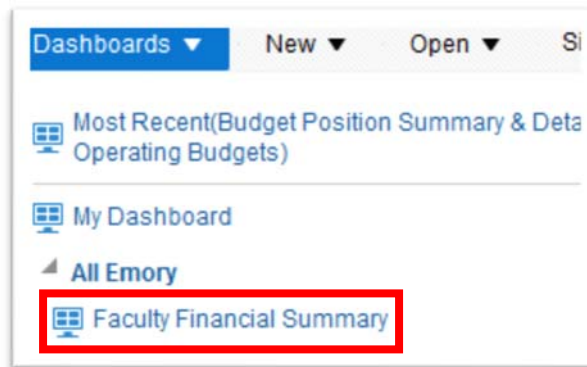
The Faculty Financial Summary is a dashboard in EBI created to allow faculty to access their complete sponsored and non-sponsored portfolio on-demand. The Faculty Financial Summary is intended to serve as an “online bank account” style view of a faculty member’s portfolio, providing current balances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





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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.*

▲
You are currently logged in as: 1490107- Long,Chelsea (clong4)
If you are missing projects below, either your department has not completed their roles assignments, or you have not been identified as having responsibility for managing any projects.
Please contact your Department Administrator if you feel this is an error.

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
 2. **NOTE:** Effective 9/1/2019, Non-Sponsored Projects have been temporarily removed from the Faculty Financial Summary. For Non-Sponsored Project reporting, please contact your Department Administrator



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- 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

The image shows four performance tiles in a row. From left to right: a blue tile with '1 Projects Ending in Next 90 Days', a yellow tile with '2 Employees Paid by Projects Ending in Next 90 Days', a blue tile with '11 Active Projects with Direct Balance Available', and a yellow tile with '8 Active Projects with Deficit Balance'. Each tile has a 'Click for details' link below the number.

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

Project	Project Begin Date	Project End Date	F&A Rate	Award	Award Principal Investigator	Award Begin Date	Award End Date	Budget (\$)	Expenses (\$)	Encumbrance (\$)	Balance (\$)	Active Projects Available Balance
00061160- CFAR Core A ADMIN (Yerkes/EVC)	08/01/16	07/31/18	56.00	0000038232- Center for AIDS Research at Em	0102076- Del Rio,Carlos	08/24/2016	07/31/18	39,284.85	33,109.48	0.00	6,175.37	6,175.37
00017576- CFAR Core A ADMIN (Yerkes)	08/01/12	07/31/17	56.00	0000014972- Center for AIDS Research at Em	0102076- Del Rio,Carlos	08/01/2012	07/31/17	145,693.00	142,185.15	0.00	3,507.85	3,507.85
Grand Total								184,977.85	175,294.63	0.00	9,683.22	9,683.22

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

Select Your View Here:

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





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2. On the preferences tab of the dialogue box, click on the drop-down menu next to “Starting Page”

The screenshot shows a 'My Account' dialog box with the following settings:

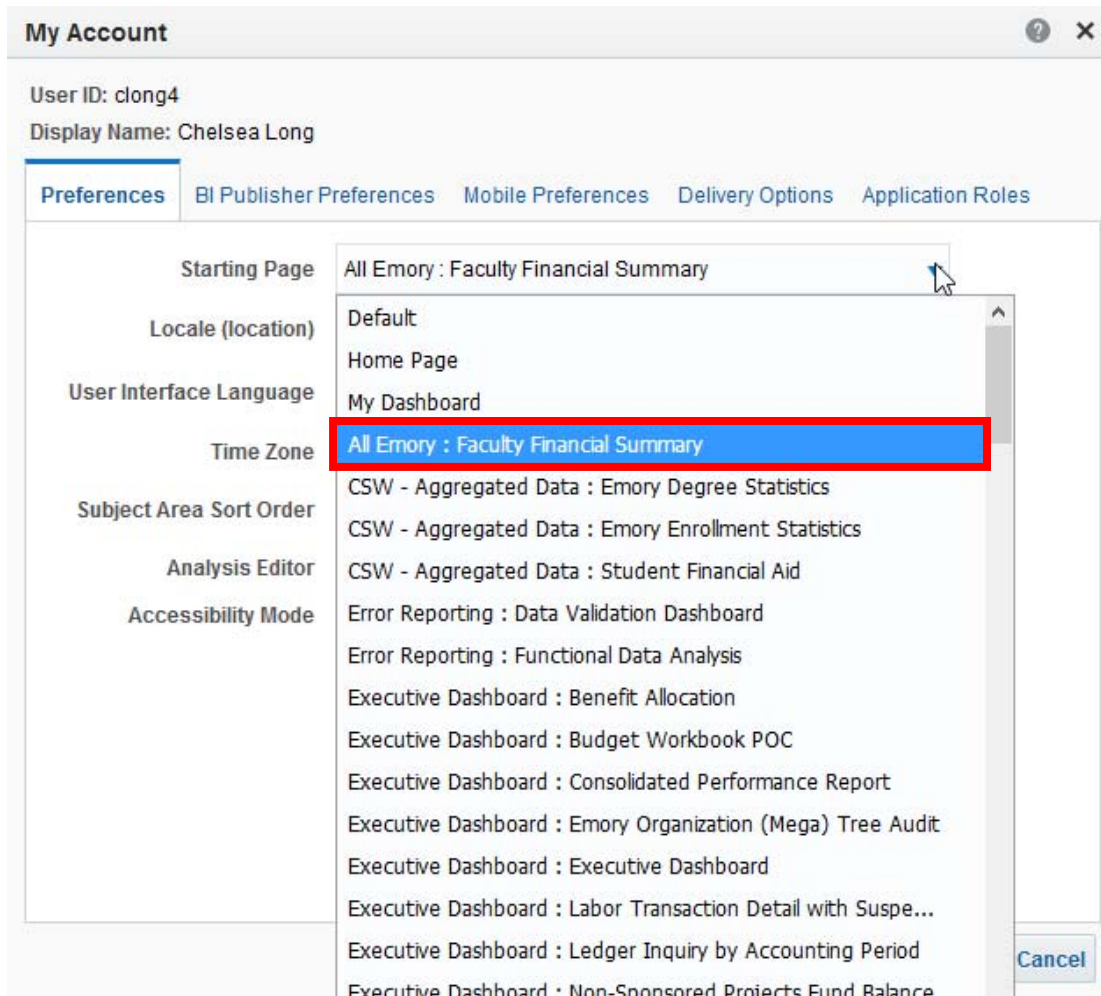
- User ID: clong4
- Display Name: Chelsea Long
- Preferences (highlighted with a red box)
- BI Publisher Preferences
- Mobile Preferences
- Delivery Options
- Application Roles
- Starting Page (highlighted with a red box): All Emory : Faculty Financial Summary
- Locale (location): Default - English - United States
- User Interface Language: Default - English
- Time Zone: (GMT-05:00) Eastern Time (US & Canada)
- Subject Area Sort Order: Sort A to Z
- Analysis Editor: Start on Criteria tab when editing Analysis
- Accessibility Mode: Default On Off

Buttons: OK, Cancel



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- 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](#).