Dashboard: Roles Assignment and Review Dashboard

What is the Roles Assignment and Review Dashboard?
The Roles Assignment and Review Dashboard is intended to be used in conjunction with the Faculty Financial Summary dashboard and the Financial Outlook Reporting Tool (FORT). Users can assign various roles to faculty and staff to identify their involvement with a Sponsored or Non-Sponsored Project.

When should I use the Roles Assignment and Review Dashboard?
Use this dashboard if you need to assign new roles or modify existing roles to populate the Faculty Financial Summary dashboard and the Financial Outlook Reporting Tool (FORT) with the correct Sponsored and Non-Sponsored Projects.

NOTE: Not all schools/units are currently using the Faculty Financial Summary or FORT. If your school/unit is not using those reports, the Roles Assignment and Review Dashboard does not need to be used. If you are unsure if your school/unit uses those reports and has assigned roles, please submit a ticket to Emory Business Intelligence for clarification.

IMPORTANT NOTES:
- Roles that are not submitted in the correct format or through the approved channels will be returned to the submitter.
- Roles submitted in the correct format to EBI will be uploaded as submitted. EBI is NOT responsible for errors caused by incorrect data.

Navigation
1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards menu in the upper right
3. In the FMS – Management folder, click the Roles Assignment and Review Dashboard link.
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Selecting Prompts for the Report

1. Select prompts to view any roles that have been assigned.
2. Click Apply

NOTE: The Speedtype Effective Status Prompt value defaults to Active.
   - This prompt has been provided to filter the SpeedTypes with Roles Currently Assigned section.
     - If roles were assigned to a speedtype while it was active, and the speedtype is later inactivated, the speedtype will retain the roles previously assigned.
     - Roles assigned to inactive speedtypes can be reviewed by changing the prompt to Inactive.

Understanding the Report

The dashboard is divided into two sections: SpeedTypes with No Roles Assigned and SpeedTypes with Roles Currently Assigned.

You can check to see if any roles have already been assigned based on the section where it appears on the dashboard.

Submitting Roles Assignments

1. Click on the Export link beneath the data in the section you wish to edit
   - For SpeedTypes with no roles currently assigned, use the top section titled SpeedTypes With No Roles Assigned
     - A speedtype is considered to have no roles assigned if no employee ID is entered in any of the roles columns, with the exception of Award PI, which is populated directly from Compass
     - A speedtype may not require any roles to be assigned. In this case, “Y” can be entered in the “No Roles Needed” column.
   - For SpeedTypes that have roles assigned or have been marked as “No Roles Needed” and need to be modified, use the bottom section titled SpeedTypes With Roles Currently Assigned
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2. Select the option to export to Excel 2007+

Submitting new roles for SpeedTypes without existing role assignments:
When submitting new roles for SpeedTypes that have not previously had roles assigned:
1. Use the top section: **SpeedTypes With No Roles Assigned**
2. Submit only the rows with role assignments. Do not submit rows with SpeedTypes that do not have role assignments.
   a. **This is important for the integrity of your roles data.** Submitting additional rows will expose your roles data to potential risk for error.
3. It is not required that all roles be assigned
   a. “Faculty” roles are for non-sponsored projects
   b. “Project PI” roles are for sponsored projects
4. **Optional:** If no roles need to be assigned to a speedtype, there is the option to mark the speedtype as “No Roles Needed.” Enter a “Y” in that column if there are no roles assignments for that speedtype. If there are roles, leave this column blank.

Updating or Modifying existing roles assigned to SpeedTypes:
When updating or modifying roles on SpeedTypes that have had role assignments in the past:
1. Use the bottom section: **SpeedTypes With Roles Currently Assigned**
2. Export, edit, and send the ENTIRE department at one time
   1. When the spreadsheet is received, the existing department in our roles database will be overwritten. If you leave out part of the department, the roles on those speedtypes will be lost and cannot be recovered.
      i. You may use column filters to view only the portion that you want to edit.
      ii. Remove all filters, frozen panes, and unhide any rows or columns before submitting
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IMPORTANT INSTRUCTIONS AND RULES FOR COMPLETION OF ROLES ASSIGNMENTS:
Absolutely no changes may be made to the following:
1. Order of the columns as presented
2. Any columns shaded GREY
3. The color/shading in any columns

Note: You must unfreeze all panes, unhide all rows and columns, and remove any filters before submitting.

4. Enter the Employee ID ONLY into the appropriate role
5. We will only assign roles based on the data populated in the “Employee ID” column for each role.
   a. The “Employee ID & Name” fields are provided for reference only and will not be used for assigning roles.
   b. To locate an Employee ID, use the Employee ID lookup page in the Roles Assignment and Review Dashboard.

Submitting completed roles assignments:
Roles assignments should be submitted to EBI by submitting a ticket via the Finance Support Center.
1. Log in to the Finance Support Center website
2. Select Emory Business Intelligence as the ticket category
3. Select Roles Assignments as the Sub Category

If you are making roles assignments to SpeedTypes in one of the below Operating Units, roles assignments MUST be submitted via the contact listed below:

<table>
<thead>
<tr>
<th>Operating Unit</th>
<th>Contact Name</th>
<th>Contact Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000 – Emory College</td>
<td>Carol King</td>
<td><a href="mailto:felecia.carpenter@emory.edu">felecia.carpenter@emory.edu</a></td>
</tr>
<tr>
<td>16000 – Goizueta Business School</td>
<td>Jerry Lockamy</td>
<td><a href="mailto:glockam@emory.edu">glockam@emory.edu</a></td>
</tr>
<tr>
<td>20000 – School of Medicine</td>
<td>Robb Merritt</td>
<td><a href="mailto:robbmerritt@emory.edu">robbmerritt@emory.edu</a></td>
</tr>
<tr>
<td>28000 – Yerkes</td>
<td>Yoko Hammond, Jonda Williams</td>
<td><a href="mailto:yhammon@emory.edu">yhammon@emory.edu</a>, <a href="mailto:jwill23@emory.edu">jwill23@emory.edu</a></td>
</tr>
</tbody>
</table>

If role assignments from these areas are submitted by anyone other than the contact listed above, they will be returned to the submitter.

When will I see my roles assignments in EBI?
- Roles submitted to EBI by the 15th of the month will be available in EBI on the 30th of the month
- Roles submitted to EBI by the 30th of the month will be available in EBI on the 15th of the following month.
- Please check the Roles Assignment and Review Dashboard to see if roles have been updated in EBI.
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More Information:
For additional assistance, please contact the Analytics & Reporting team via the Finance Support Center. Choose Emory Business Intelligence (EBI)/Reporting as your ticket category and Roles Assignment as your subcategory.