EMORY UNIVERSITY | Enterprise Data Analytics and Strategic Support
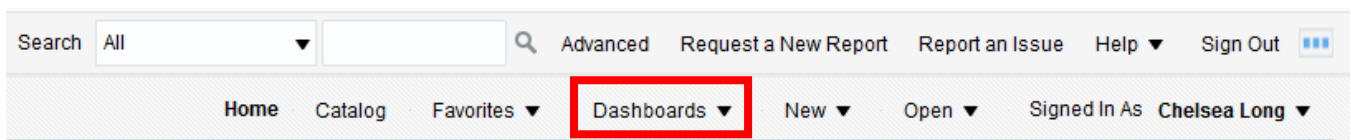
Job Aid: PI Financial Portal (Faculty Version)

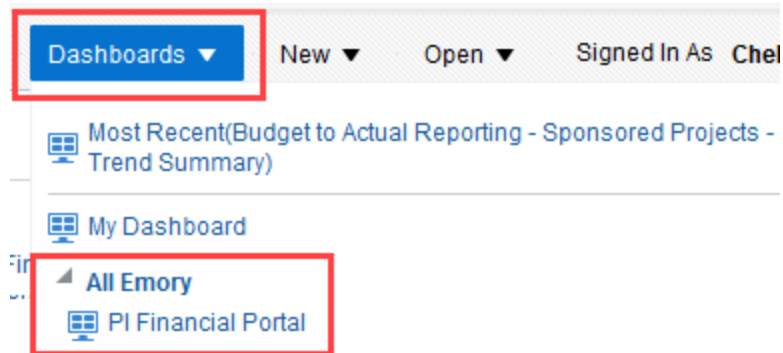### What is the PI Financial Portal dashboard?

The PI Financial Portal (formerly known as Faculty Financial Summary) is a dashboard in EBI created to allow faculty to access their complete sponsored and non-sponsored portfolio on-demand. The PI Financial Portal 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 PI Financial Portal?

1. Log in to EBI: https://dwbi.emory.edu/analytics
2. Click on the Dashboards menu in the upper right

3. The PI Financial Portal appears in the **All Emory** folder

Job Aid: PI Financial Portal (Faculty Version)

How does the PI Financial Portal work?

1. **Prompts are not used for the PI Financial Portal**
   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 through Account Administrator.
      i. Account Administrator is available in Compass for certain staff to assign projects to faculty. Please contact your local department administrator to review or assign your roles in Account Administrator.

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 through Account Administrator
      ii. **Non-Sponsored Projects**
         1. Faculty are assigned by department in which the project resides through Account Administrator

Job Aid: PI Financial Portal (Faculty Version)

    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

Projects Ending in Next 90 Days	Employees Paid by Projects Ending in Next 90 Days	Active Projects with Direct Balance Available	Active Projects with Deficit Balance
1	**2**	**11**	**8**
Click for details	Click for details	Click for details	Click for details

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

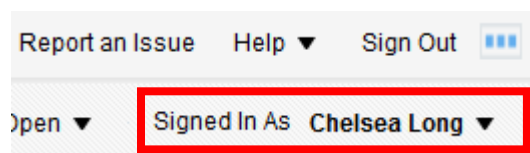| Project	Project Begin Date	Project End Date	F&A Rate	Award	Award Principal Investigator	Award Begin Date	Award End Date	Budget ($)	Expenses ($)	Encumbrance ($)	Balance ($)	Active Projects Available Balance
00061160- CFAR Core A ADMIN (Yerkes/EVC)	08/01/16	07/31/18	56.00	0000038232- Center for AIDS 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: Project Summary ⌄

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

Setting the PI Financial Portal 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

Report an Issue   Help ▼   Sign Out   ▪▪▪

)pen ▼   Signed In As **Chelsea Long** ▼

EMORY UNIVERSITY | Enterprise Data Analytics and Strategic Support

Job Aid: PI Financial Portal (Faculty Version)

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: PI Financial Portal and click OK

My Account

User ID: clong4
Display Name: Chelsea Long

Preferences   BI Publisher Preferences   Mobile Preferences   Delivery Options   Application Roles

Starting Page	All Emory : PI Financial Portal
Locale (location)	Default - English - United States
User Interface Language	Default - English
Time Zone	Default - Unknown Time Zone
Subject Area Sort Order	Default - Sort in Saved Order
Analysis Editor	Start on Criteria tab when editing Analysis
Accessibility Mode	● Default ○ On ○ Off

OK   Cancel

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 PI Financial Portal website
- For detailed instructions on customization options, please view the Staff Version of the PI Financial Portal Job Aid.