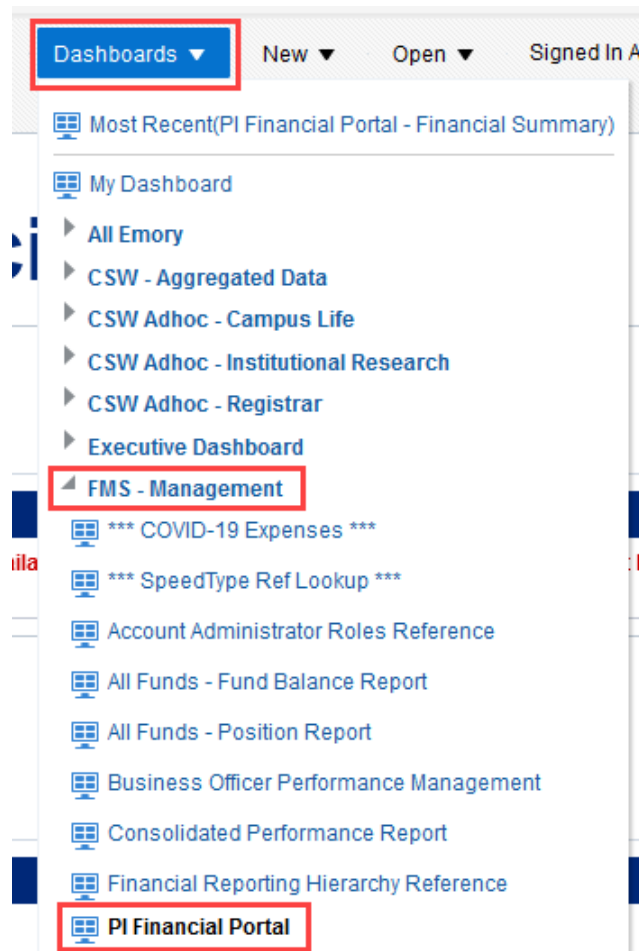# Job Aid: PI Financial Portal (Staff Version)

## 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. While specifically geared toward faculty use, this job aid is provided to administrative staff in the event that they wish to:

- Assist faculty with setup or inquiries related to the dashboard
- Utilize the dashboard to monitor portfolios of faculty they support

## 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 and the **FMS – Management** folder. Staff wishing to view faculty portfolios should use the version in the FMS – Management folder, as it contains a prompt to select the faculty member.

# Job Aid: PI Financial Portal (Staff Version)

## How does the PI Financial Portal work?

1. **Prompt: The only prompt is the Faculty member's name.**
   a. Your NETID is inherited upon login, and the dashboard will begin to run using your NETID in the prompt
   b. Upon navigation to the Dashboard, if a faculty member has been assigned responsibility for any projects, their name will automatically populate in the prompt and begin to run the dashboard
   c. Alternatively, any EBI user can use the prompt, as normal, to select a faculty member's name to view their portfolio
   d. If a faculty member's name does not appear in the prompt, their portfolio has not been assigned.
      i. **NOTE:** Assignments are made using the Account Administrator tool via Compass. If you do not have access to assign roles using Account Administrator, please contact your local school/unit finance office for assistance.

> You are currently logged in as: **clong4**
>
> If your name is not automatically populated in the Employee prompt 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.*
>
> **Faculty Member**
> --Select Value--  ▼
>
> Apply   Reset ▼

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 (Staff 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 ⌄
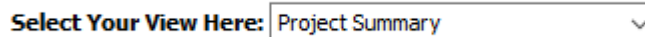
## How can I help my faculty member customize the PI Financial Portal?

**NOTE:** to assist faculty in customizing the PI Financial Portal, please have the faculty member log in to EBI, and navigate to the All Emory: PI Financial Portal dashboard.

1. **Collapsing sections:** The ability to collapse any section on the dashboard to remove that data from view
    a. Collapsing sections is useful if there is a section of the report that does not pertain to a faculty member's portfolio, to remove items such as Prompt selections from view, or to remove views of data that are not preferable (ie – your faculty member does not like to view performance tiles).
    b. To collapse a section, simply click on the down arrow that is seen in the upper left corner of any section:

| Award | Agency Name |
|---|---|
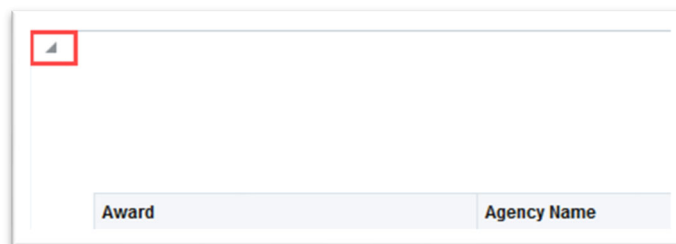
c.  Once collapsed, the section will not be readily visible, but can be expanded at any time by clicking the same arrow.

i.  NOTE: you can collapse the prompt section and the note above in order to save screen space.

2.  **View Selectors:** View selectors allow a user to select from a variety of views that display similar information in a different format (eg: summary view vs. detail view).

a.  To select the preferred view for your faculty member, click on the drop down menu for the selector and click on the view that is preferred. The table will automatically update with the selected view once a selection has been made.

**Available balance on active awards for which you have been identified as the Award PI**

Select Your View Here: Award Summary Direct Costs Only ▼

- Award Summary
- Award/Project Summary
- **Award Summary Direct Costs Only**
- Award/Project Summary Direct Costs Only

| Award | Agency Name | Award Dept | Award B... | | rect Costs Expenses ($) | Encumbrance ($) | Direct Costs Balance | Active Projects Direct Costs Available Balance |
|---|---|---|---|---|---|---|---|---|
| 0000026677- A Rational Approach for HIV Va | UNIVERSITY OF ALABAMA BIRMINGHAM | 821000- YRK: Emory Vaccine Center | 07/15/2... | | 136,012.68 | 1,732.50 | (5,038.55) | (3,052.63) |
| 0000030853- CTL AND HIV POLYMORPHISMS IN H | NIH NATL INST OF ALLERGY AND INFECTIOUS | 821000- YRK: Emory Vaccine Center | 07/01/2... | | 2,231,877.93 | 263,626.05 | 1,035,944.02 | 1,035,944.02 |
| 0000033338- B and T Cell Biology of Protec | NIH NATL INST OF ALLERGY AND INFECTIOUS | 821000- YRK: Emory Vaccine Center | 06/01/2016 | 05/31/2021 | 8,321,662.00 | 3,903,052.99 | 211,880.35 | 4,206,728.66 | 4,206,728.66 |
| 0000035641- YR 15: Virologic Correlates of | NIH NATL INST OF ALLERGY AND INFECTIOUS | 821000- YRK: Emory Vaccine Center | 04/01/2016 | 03/31/2018 | 1,393,274.25 | 743,756.24 | 36,938.74 | 612,579.27 | 612,579.27 |
| 0000036621- Role of HIV Env glycosylation | UNIVERSITY OF NEBRASKA | 821000- YRK: Emory Vaccine Center | 07/01/2016 | 06/30/2018 | 18,912.00 | 15,951.10 | 14.62 | 2,946.28 | (84.07) |
| 0000040104- 12th International Workshop on | NIH NATL INST OF ALLERGY AND INFECTIOUS | 821000- YRK: Emory Vaccine Center | 06/01/2017 | 05/31/2018 | 25,000.00 | | 0.00 | 25,000.00 | 25,000.00 |
| **Grand Total** | | | | | 13,423,002.88 | 7,030,650.94 | 514,192.26 | 5,878,159.68 | 5,877,115.25 |

Refresh - Print - Export

3.  **Common EBI Customizations:** Tabular reports on the PI Financial Portal can be customized in the same ways as any other EBI report, including:

a.  Custom sorting
b.  Adding and removing subtotals
c.  Moving columns
d.  Excluding and including columns
e.  For further instruction on these customization methods, please view the Using Customizations in EBI job aid.
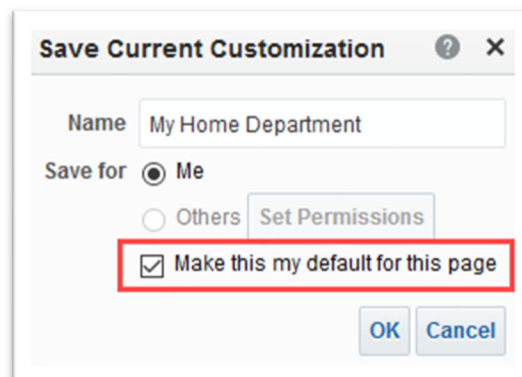
# Job Aid: PI Financial Portal (Staff Version)

## How do I save the customization once it meets the faculty member's needs?

1. While still logged in under the faculty member's name, and without navigating away from the PI Financial Portal, click on the Page Options menu in the upper left-hand corner of EBI.

2. Select the option for Save Current Customization
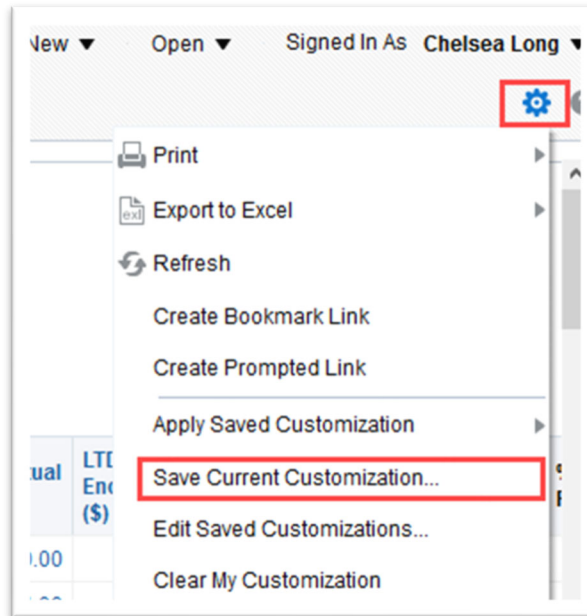


3. A dialogue box will appear.
    a. Provide a name for the customization. The customization will only exist on this dashboard, for this faculty member. It is only important that the name of the customization makes sense to the faculty member.
    b. **Check the box next to "Make this my default for this page".** This means that whenever the faculty member navigates to this dashboard, the report will begin running using the version customized to meet their needs.
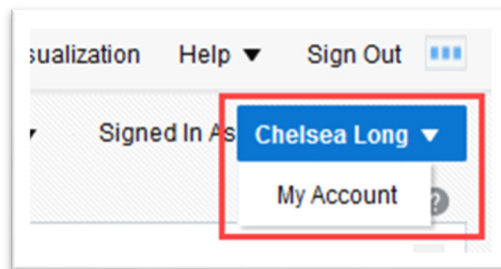    c. Click OK

## Job Aid: PI Financial Portal (Staff Version)

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

**NOTE:** to set the PI Financial Portal as the faculty member's home screen, please have the faculty member log in to EBI.

1. Click on the faculty member's name in the upper right-hand corner of EBI, and click My Account.



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
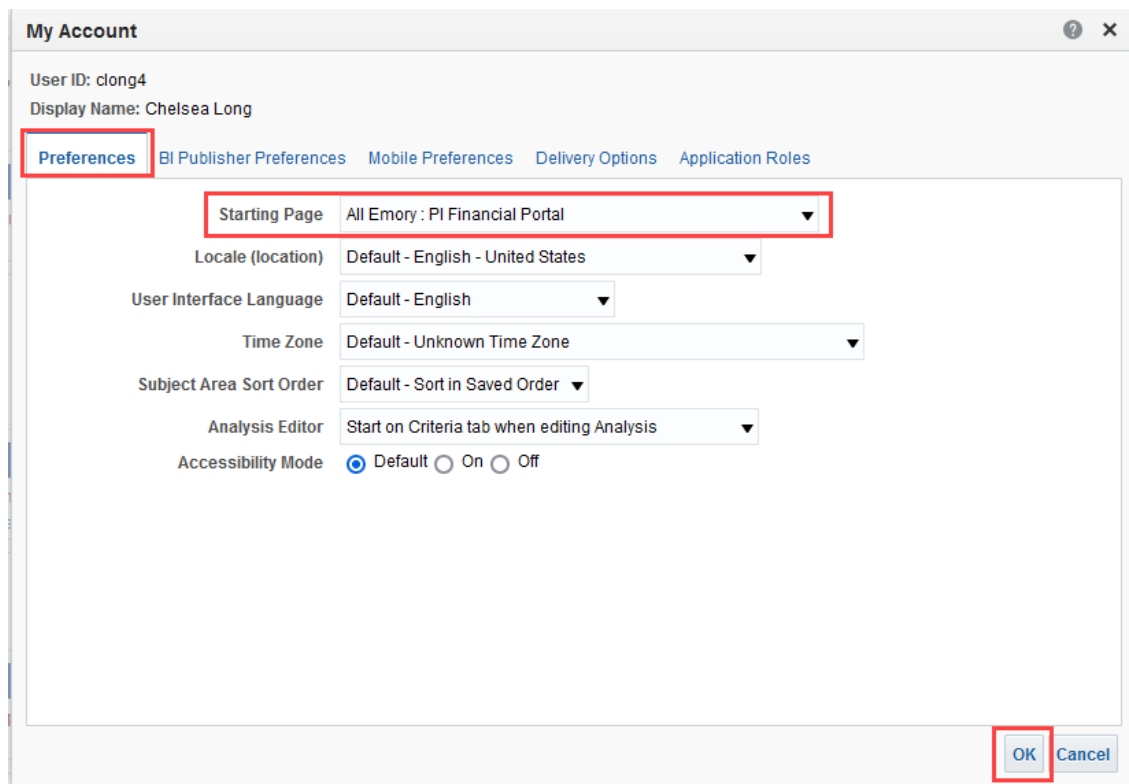
## Need additional help?

- For additional assistance please contact EBI via the Financial Support Center.
  - Choose **Emory Business Intelligence** as your ticket category
- Visit the faculty-centered PI Financial Portal website