Research Dashboard

Introduction

"Research Visibility – Finance Dashboard"

- Available on Weill Business Gateway
- Provides a summary of financial information
- Graphical representation of budgets, expenses, commitments, and balances
- Ability to delve into detail as needed
- Developed to assist Faculty and Department Administrators
- Helps in narrowing down which Account (Sponsored Program) requires attention
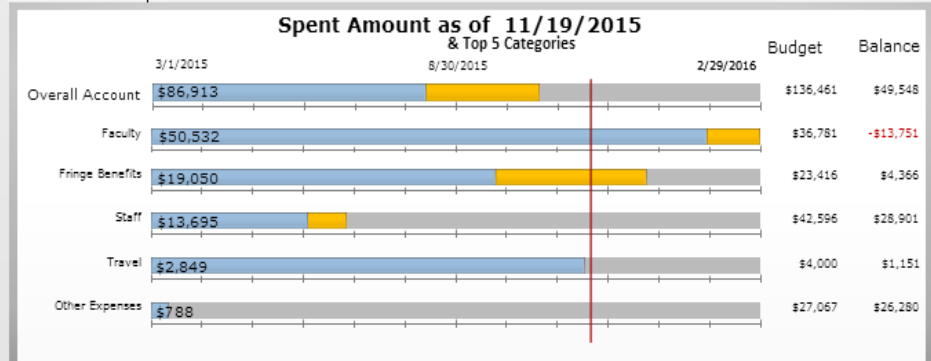- Linked to existing BI Reports

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Research Visibility – Finance Dashboard

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Research Dashboard Overview

Dashboard Areas

Dashboard Areas

1

Grant Summary - Top left quadrant

- Top left quadrant shows the summary of financial information for accounts (sponsored programs)
- Includes total budget
- Total amount of expenses
- Total outstanding commitments
- Balance available.
- Displays the direct expenses of the sponsored accounts that are active or have recently expired within 90 days of the current date
- The summary is similar to the "Grant Statement" BI report.

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Dashboard Areas

② **Spend Trends - Top right quadrant**
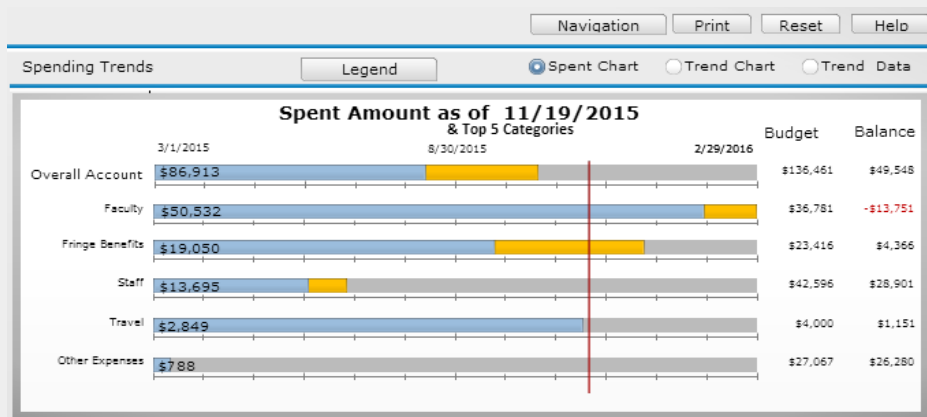
- Account selected in section 1, drives the top right quadrant
- Visualize spend against budget for top 5 expense categories as of today.
- Option of changing how you want to view the spend trends with the chart selections in the upper right corner of the quadrant
- **Legend** button to understand the spend chart coloring
- **Current Date** line indicator based on the date you are viewing the dashboard, between the start and end date of the grant period.
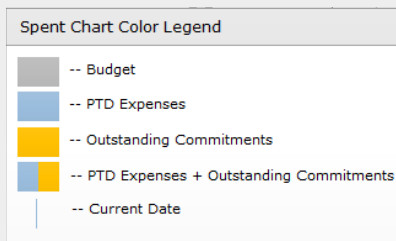
Dashboard Areas

3

Breakdown by Category - Bottom left quadrant

Breakdown by Category	● Categories	○ GL Account	○ Doc Type		Display Details

Category	Category Name	Payroll Ind	PTD Expenses	Commitments	PTD Balance
G6010	Faculty	Labor	33578.45	16953.79	-13751.24
G6030	Staff	Labor	10995.48	2699.82	28900.7
G6110	Fringe Benefits	Fringe Benefits	13261.17	5788.76	4366.07
G6370	Other Expenses	Non-Payroll	787.5		26279.5
G6385	Office Supplies	Non-Payroll			2601
G6470	Travel	Non-Payroll	2848.51		1151.49

- Bottom left quadrant shows the details of the expenses for the selected account in quadrant 1.

- Includes _all_ expense categories, associated expenses and outstanding commitments for each category.

- Ability to drill down into further details as they are linked to existing BI Reports by selecting the **Display Details** Icon

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Dashboard Areas

4 **Open POs, Invoices, Pcard Purchases - Bottom right quadrant**

- Bottom right quadrant displays purchase history and transactions for the selected account in section 1.
- Displays purchase order details
- Associated invoices
- PCard expenses
- Views between purchase order history and pcard expenses can be changed by using the dropdown menu

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Access

- PI's would only be able to access accounts that they are assigned as the PI on the sponsored program master data.

- Departmental personnel with approver, display and BI reporting access would be able to access the Research Dashboard

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