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
Research Visibility – Finance Dashboard

- **Budget** and **Balance** columns for various categories:
  - Overall Account: Budget $126,851, Balance $126,851
  - Faculty: Budget $26,782, Balance $126,851
  - Fringe Benefits: Budget $13,070, Balance $126,851
  - Staff: Budget $12,000, Balance $126,851
  - Travel: Budget $2,869, Balance $126,851
  - Other Expenses: Budget $7,86, Balance $126,851

- **Breakdown by Category** and **Invoice Details**:
  - GL Account Name: CONSULT SEI 07/02/2015
  - Vendor: Code #
  - Amount: $787.5

- **Spending Trends** and **Invoice Details** for various invoices:
  - Code # Check: $787.5

Overall, the dashboard provides a comprehensive view of spending trends and financial breakdowns for different categories.
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.
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

Breakdown by Category - Bottom left quadrant

- 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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Category Name</th>
<th>Payroll Ind</th>
<th>PTD Expenses</th>
<th>Commitments</th>
<th>PTD Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>G5010</td>
<td>Facility</td>
<td>Labor</td>
<td>33578.45</td>
<td>18653.79</td>
<td>-13754.24</td>
</tr>
<tr>
<td>G5050</td>
<td>Staff</td>
<td>Labor</td>
<td>10995.40</td>
<td>2096.02</td>
<td>20903.7</td>
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<td>G6110</td>
<td>Fringe Benefits</td>
<td>Fringe Benefits</td>
<td>13261.17</td>
<td>5700.76</td>
<td>4366.97</td>
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<tr>
<td>G6370</td>
<td>Other Expenses</td>
<td>Non-Payroll</td>
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<td>28279.5</td>
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<tr>
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<td>Office Supplies</td>
<td>Non-Payroll</td>
<td></td>
<td></td>
<td>2681</td>
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<tr>
<td>G6470</td>
<td>Travel</td>
<td>Non-Payroll</td>
<td>2846.51</td>
<td></td>
<td>1151.49</td>
</tr>
</tbody>
</table>
Dashboard Areas

- 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
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