

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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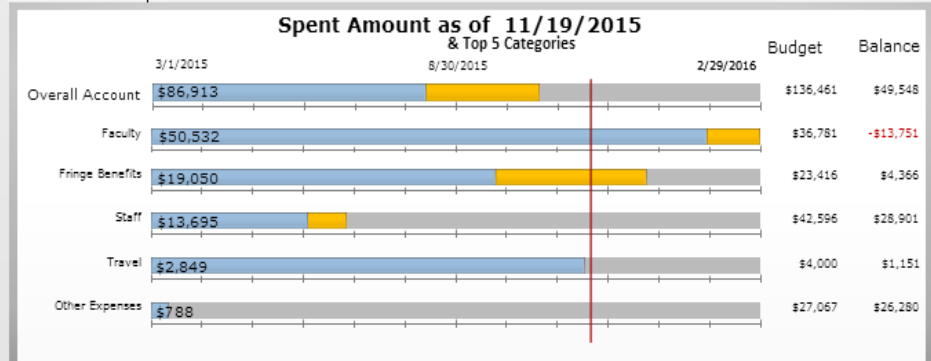
Research Visibility – Finance Dashboard

Research Visibility - Finance

Grants Summary Principal Investigator Display Master Data

Acc	Ar	Valid To	Budget	PTD Expenses	Commitmei	PTD Balance	Status
529	1 U	07/31/2016	37,675.00	41,619.66	14,844.37	-18,789.03	■
529	EMI	08/31/2016	39,014.66	9,453.03	18,826.94	10,734.69	●
542	MS	02/29/2016	136,461.00	61,471.11	25,442.37	49,547.52	●
532	MA	06/30/2016	71,360.00	21,841.60	45,495.00	4,023.40	▲
529	HA	10/31/2018	18,895.55	7,000.00		11,895.55	●
529	NIN	07/31/2017	88,539.60	27,638.93		60,900.67	●
532	NM	09/30/2015	132,545.39	109,616.31		22,929.08	●
529	5 U	03/31/2016	2,000.00	120.00		1,880.00	●
529	UC	08/31/2015	28,800.00	310.00		28,490.00	●

Spending Trends Legend Spent Chart Trend Chart Trend Data



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

Invoice Details Display Details (2) Invoices

GL Account	Name	Clear Date	Vendor	Nar	PO #	Line Item	Method	Amount
641004	CONSULT SEI	07/22/2015	125268	FRE #		#	Check	787.5
647010	Dom. Travel -	07/30/2015	203006	Clair #		#	Check	679.2
647020	Dom. Travel -	07/30/2015	203006	Clair #		#	Check	1312.61
647040	Dom. Travel -	07/30/2015	203006	Clair #		#	Check	230.05
647050	Dom. Travel -	07/30/2015	203006	Clair #		#	Check	250

Dashboard Areas

Research Visibility - Finance Navigation Print Reset Help

Grants Summary Principal Investigator Display Master Data Spending Trends Legend Spent Chart Trend Chart Trend Data

Acc#	Valid To	Budget	PTD Expenses	Commitm	PTD Balance	Status
5294	1 U 07/31/2016	37,675.00	41,619.66	14,844.37	-18,789.03	■
5294	EMII 08/31/2016	39,014.66	9,453.03	18,826.94	10,734.69	●
5425	MS 02/29/2016	136,461.00	61,471.11	25,442.37		●
5327	MA 06/30/2016	71,360.00	21,841.60	45,495.00		▲
5294	HA 10/31/2018	18,895.55	7,000.00			●
5294	NIN 07/31/2017	88,539.60	27,638.93			●
5327	NM 09/30/2015	132,545.39	109,616.31		22,929.08	●
5294	S U 03/31/2016	2,000.00	120.00		.00	●
5294	UC 08/31/2015	28,800.00	310.00		.00	●

Spent Amount as of 11/19/2015
& Top 5 Categories

	3/1/2015	8/30/2015	2/29/2016	Budget	Balance
Overall Account	\$86,913			\$136,461	\$49,548
Faculty	\$50,532			\$36,761	-\$13,751
Fringe Benefits				\$23,416	\$4,366
Staff	\$13,665			\$42,596	\$28,901
Travel	\$2,849			\$4,000	\$1,151
Other Expenses	\$788			\$27,067	\$26,280

Breakdown by Category Categories GL Account Doc Type Display Details Display Details (2) Invoices

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Dashboard Areas

1

Grant Summary - Top left quadrant

Research Visibility - Finance

Grants Summary Principal Investigator

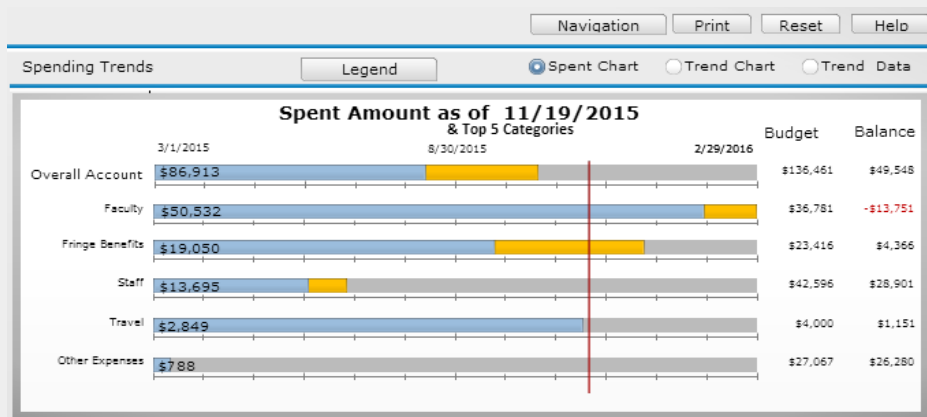
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- Top left quadrant shows the summary of financial information for accounts (sponsored programs)
- Includes total budget
- Total amount of expenses
- Total outstanding commitments
- Balance available.
- Displays the direct expenses of the sponsored 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.

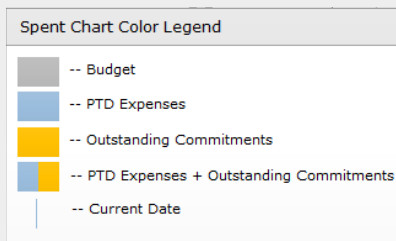
Dashboard Areas



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

Category	Category Name	Payroll Ind	PTD Expenses	Commitments	PTD Balance
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- 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



Dashboard Areas

4

Open POs, Invoices, Pcard Purchases - Bottom right quadrant

Invoice Details Display Details (2) Invoices

GL Account	Name	Clear Date	Vendor	Nar	PO #	Line Item		
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647010	Dom. Travel -	07/30/2015	203006	Clai#	#			
647020	Dom. Travel -	07/30/2015	203006	Clai#	#	Check	1312.61	
647040	Dom. Travel -	07/30/2015	203006	Clai#	#	Check	230.05	
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(1) Open Purchase Orders
(2) Invoices
(3) PCard Purchases

- 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

