



OBJECTIVE

Harvard University is implementing PI Dashboard, a new reporting and projection tool, for faculty and financial staff to report on funding sources and project future expenses. The PI Dashboard serves as a one-stop-shop that provides a comprehensive and accurate view of expense data, detailed reporting, dashboards and analytics.

OVERVIEW

Why

Currently, departmental and financial staff use multiple applications and/or local shadow systems to get a complete picture of a faculty's funding portfolio. In addition, the process can be time consuming and the results inconsistent and inaccurate across the University.

Who

Faculty and staff including departmental administrators, financial administrators, sponsored research administrators, and faculty.

What

Originally developed in SEAS to provide an easy to use and streamlined reporting tool for faculty and financial staff, it was enhanced with additional projection functionality when it was adopted by the Chan SPH. The tool is now an enterprise wide system, supported by HUIT and is being rolled out by other schools across campus.

PI Dashboard is a web-based system that helps provides Faculty, PIs, and I administrators, with an up to date, and complete view of a faculty's funding portfolio including sponsored, non-sponsored funds, and faculty startup funds. The Dashboard pulls data from several University systems (e.g., PeopleSoft, GMAS, and Oracle Financials) to provide users with a consolidated, user friendly interface which can help answer the key question asked by every faculty member: 'How much money do I have left to spend?'

When

In FAS, we are implementing PI Dashboard in waves starting FY17 with departments in the Sciences and Social Sciences, and rollout to applicable Centers and A&H departments in FY19.

BENEFITS

- Quick at-a-glance view including: balances, encumbrances, transactions to-date, and estimated remaining balances
- Enables better communication with faculty by helping staff to:
 - Provide quicker response to faculty inquiries regarding fund balances
 - Consist reporting information and results across departments
- Transparent and standardized method for tracking non-sponsored funds

FEATURES

- **Reports:** Formatted, printer friendly summary of all sponsored and non-sponsored funds for faculty

- **Encumbrances:** Balances include personnel encumbrances and open commitments
- **Projections:** Module to build and share projections, scenario information flows through to reports
- **Additional Integrated Tools:**
 - Attach PDF files (emails and documentation)
 - In application message board (notes)
 - Display expenses in table or chart format

PI DASHBOARD PREVIEW

← PI List Fogg, Philae

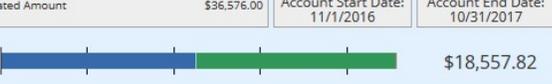
Account Type: Sponsored (Funds 100000 - 29) Sort By: Account Number

Filter

Longitudinal Study on Ebola

Description: Administration Award Number: LSE-01928
 Account String: 275-99999-199994-999994-0101-99998 Sponsor:

Obligated Amount: \$36,576.00 Account Start Date: 11/1/2016 Account End Date: 10/31/2017

 \$18,557.82

Economic Benefits of Better Bug Spray

Description: Chemicals Award Number: LSE-01928
 Account String: 275-99999-199995-999995-0001-99998 Sponsor: Ocean Liners of the Atlantic

Obligated Amount: \$1,085,781.00 Account Start Date: 4/15/2016 Account End Date: 3/31/2018

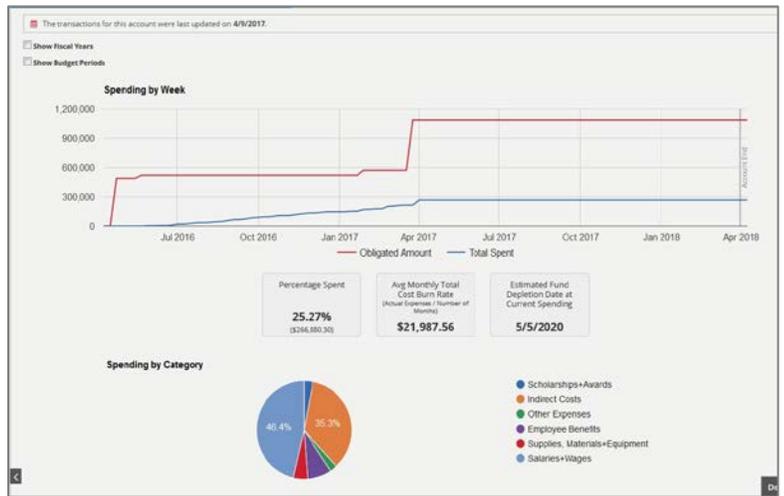
 \$818,900.70

Economic Benefits of Better Bug Spray

Description: Chemicals Award Number: IR987
 Account String: 275-99999-199995-999995-0002-99998 Sponsor: NIH

Obligated Amount: \$125,048.00 Account Start Date: 4/15/2016 Account End Date: 3/31/2017

 \$90,303.34



Transactions Show only unmatched Org/Root transactions: Sort By: Date Category: All Expand All Collapse All

Date	Object Code / Desc	Payee	Amount
03/10/2017	6750 - Computer Hardware <\$5000, GENERAL	Vendor Name	\$18.00
03/08/2017	6750 - Computer Hardware <\$5000, GENERAL	Vendor Name	\$1,829.00
03/06/2017	6750 - Computer Hardware <\$5000, GENERAL	Vendor Name	\$29.00
01/31/2017	6750 - Computer Hardware <\$5000, GENERAL	Vendor Name	\$135.19
Total			\$2,011.19

