Job Aid: PI Financial Portal (Faculty 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. The PI Financial Portal is intended to serve as an “online bank account” style view of a faculty member’s portfolio, providing current balances based on expenses that have already occurred.

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
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How does the PI Financial Portal work?

1. **Prompts are not used for the PI Financial Portal**
   a. The Emory NETID is inherited upon login to EBI
   b. Upon navigation to the Dashboard, if a faculty member has been assigned responsibility for any projects, their name will automatically populate at the top of the page and begin to run the dashboard
   c. If data does not populate for the faculty member, their portfolio has not been assigned through Account Administrator.
      i. Account Administrator is available in Compass for certain staff to assign projects to faculty. Please contact your local department administrator to review or assign your roles in Account Administrator.

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
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 50 Days](image1)
   ![Employees Paid by Projects Ending in Next 50 Days](image2)
   ![Active Projects with Direct Balance Available](image3)
   ![Active Projects with Deficit Balance](image4)

   ii. **Tabular Reports** – more detailed information related to the section’s content.

<table>
<thead>
<tr>
<th>Project</th>
<th>Project Begin Date</th>
<th>Project End Date</th>
<th>FFA Rate</th>
<th>Award</th>
<th>Award/Principal Investigator</th>
<th>Award Begin Date</th>
<th>Award End Date</th>
<th>Budget ($)</th>
<th>Expenses ($)</th>
<th>Encumbrance ($)</th>
<th>Balance ($)</th>
<th>Active Projects Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>C0081866 - CPAR Core A ADMIN (TestSet1)</td>
<td>08/01/16</td>
<td>07/31/18</td>
<td>96.00</td>
<td>0000083232- Center for AIDS Research at Em</td>
<td>012096- Del Rio Carlos</td>
<td>08/24/2016</td>
<td>07/31/18</td>
<td>30,284.85</td>
<td>33,109.48</td>
<td>0.00</td>
<td>6,175.37</td>
<td>6,175.37</td>
</tr>
<tr>
<td>C0017767 - CPAR Core A ADMIN (TestSet2)</td>
<td>08/01/16</td>
<td>07/31/17</td>
<td>95.00</td>
<td>000004972 - Center for AIDS Research at Em</td>
<td>012097 - Del Rio Carlos</td>
<td>08/09/2012</td>
<td>07/31/17</td>
<td>145,615.00</td>
<td>142,183.15</td>
<td>0.00</td>
<td>3,507.85</td>
<td>3,507.85</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>184,937.85</td>
<td>175,294.63</td>
<td>0.00</td>
<td>9,683.22</td>
<td>9,683.22</td>
</tr>
</tbody>
</table>

   iii. **View Selectors** – drop down menus that allow users to select different views of the data (available on tabular reports)

   ![Select Your View Here](image5)

   **How can I set the PI Financial Portal to be my home screen when I log in to EBI?**

   Setting the PI Financial Portal as your home screen in EBI means that when you log in to EBI, the Dashboard will appear automatically, without the need to navigate to the Dashboard via the menu.

   1. Click on your name in the upper right-hand corner of EBI, then click My Account

   ![Signed In As](image6)
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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 (EBI)/Reporting as your ticket category
- Visit the faculty-centered PI Financial Portal website
- For detailed instructions on customization options, please view the Staff Version of the PI Financial Portal Job Aid.