The Table of Contents below allows users to quickly navigate to details in the defined sections by clicking on the bolded titles.

Table of Contents

Overview ............................................................................................................................................................. 1
Navigation ........................................................................................................................................................... 1
   Using Filters .................................................................................................................................................. 2
   Tips ................................................................................................................................................................ 2
Sponsored Programs - Homepage ...................................................................................................................... 4
SP Transactions Tab ............................................................................................................................................ 6
Faculty Funds Tab ............................................................................................................................................... 7
Cost Share Tab .................................................................................................................................................... 9
Instructions for Exporting to Excel ................................................................................................................... 10
Frequently Asked Questions ............................................................................................................................ 11

Overview

The PI Project Tracking Dashboard provides financial data on Sponsored Programs and Faculty Funds Projects by Entity or assigned Project Manager. The data presented in the dashboard is current to the previous day and is derived from several source reports, including but not limited to:

- Budget to Actuals – Sponsored Programs Analysis
- Sponsored Program Award Portfolio
- Sponsored Program Expenditures
- Mandatory Cost Share Report

Navigation

1. Access to the dashboard is available through multiple locations:
   - OVPR Website
   - CARA reports page
   - Project Management Data Portal
   - PI Project Tracking Dashboard tile

2. Users must be approved, and access granted by the IT Securities team, at the recommendation of Business Officers.

3. Use the scroll bar on the right side of the screen to view additional reports.

4. Use the tabs at the bottom of the screen for additional data sets.
Using Filters
Each tab has a unique set of filters applicable to the page data. The filters are next to the BU logo surrounded by a gold border.

The Sponsored Programs tab and the Faculty Funds tab have the below filters:

The SP Transactions tab also includes a Supplier Name filter.
The Cost Share tab has filters for Project Manager, Award Number, and Project Number.

Tips
1. Clear the prior selection in each filter and then select the new value.
2. When filtering by **Project Manager**, all tabs at the bottom of the dashboard will display data related to the selected PM.

| Sponsored Programs | SP Transactions | Faculty Funds | Cost Share |

3. When filtering by **Department**, the Project Manager and Project Number filters will display values corresponding to that Organization only.

4. When filtering by **Project Number**, the Project Manager and Department filters will display values corresponding to that specific project only.

5. When the dashboard is closed, all selected filters are automatically saved on your individual computer. This means that when you reopen the dashboard, your previous selections will be displayed.

6. If you ever need to revert all selected filters and return to the original view, click the **Revert All Changes** icon in the top right corner of the screen.
Notes: 1. The first time the dashboard is accessed, it will default to a single project manager. Use the filters near the BU logo to enter a new Project Manager. Once that is done, the dashboard details will default to the new setting.
2. For projects with multiple PIs, it is necessary to enter the Lead PI to access the data for that project.

---

1. Sponsored Programs Projects Overview provides general information on projects assigned to the defined Project Manager entered in the top filter.
2. Total Expenses, Commitments & Remaining provides at-a-glance details in bar and pie chart formats.
   Note: It is necessary to scroll down to see the remaining reports
3. Expenses by Category are displayed in table and bar chart formats.
4. **Non-Salary Expenses & Commitments by Supplier** are displayed in table and bar chart formats.
   
   a. Hover over the horizontal bars to see the Supplier Name and details

5. **Salary Distributions by Academic Year Breakout** provides totals of salary expenses by semester.

6. **Salary Distributions by Expenditure Item Date** provides totals of salary expenses by month.

*Note: Both Salary tables are displayed based on the expenditure item date, not the accounting date.*
SP Transactions Tab

This is the second tab found at the bottom left of the page. It includes detailed transactions for Sponsored Programs, excluding the following Expenditure Categories: Salary and Wages, Fringe Benefits, and Indirect Expenses.

<table>
<thead>
<tr>
<th>Sponsored Programs</th>
<th>SP Transactions</th>
<th>Faculty Funds</th>
<th>Cost Share</th>
</tr>
</thead>
</table>

All expenses are listed by line, including Award Number, Award Name, Project Number, Project Name, Funding Source, Expenditure Category, Expenditure Type, Project Accounting Date, Expenditure Item Date, Transaction Source, Transaction Number, Expense Amount, Expenditure Comment, Supplier Name, Employee Name, and Supplier Invoice Number.

Use the filters near the BU logo to further refine the data.
Faculty Funds Tab

This is the third tab found at the bottom left of the page.

1. **Faculty Funds Overview** provides general information on Faculty Funds projects assigned to the defined Project Manager entered in the top filter. Data is sorted for both task types: Faculty Discretionary Funds and Startup Funds.

2. **Total Expenses, Commitments & Remaining** provides at-a-glance details in bar and pie chart formats.

3. **Expenses by Category** are displayed in table and bar chart formats.

4. **Salary Distributions by Academic Year Breakout** provides totals of salary expenses by semester.
5. Salary Distributions by Expenditure Item Date provides totals of salary expenses by month.

<table>
<thead>
<tr>
<th>Expenditure Category</th>
<th>Percent of Use</th>
<th>Budgeted Expenses</th>
<th>Actual Expenses</th>
<th>Variance</th>
<th>Var %</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALARIES AND WAGES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Both Salary tables are displayed based on the expenditure item date, not the accounting date.

Use the filters near the BU logo to further refine the data.

**Note:** If all visualizations display No Data Found, it indicates that no Faculty Funds are assigned to the PM.
Cost Share Tab

This is the fourth tab found at the bottom left of the page.

This tab corresponds to the Mandatory Cost Share Report. It displays Sponsored Program Projects with an Award Status = Active and Funding Source = Internal. These projects are flagged for Cost Share Required by Sponsor in Ignite. All projects reflected have registered expenses or commitments greater than $0.

1. **Total Internal Expenses** (Bar chart by Project Number)
2. **Internal Expenses by Category**: Budget, Expenses, Commitments, and Remaining Funds by project.
3. **Mandatory Cost Share Details**: Funding Source Name, Award Number, Project Number, Project Name, Project Organization Name, Project Status, Project Start Date, Project Finish Date, Project Manager (in case filters are applied by Award Number or Project Number), and Cost Share Required by Sponsor Indicator.

Use the filters near the BU logo to further refine the data.

**Note**: After selecting a Project Manager, if all visualizations display 'No Data Found', it indicates no projects are assigned to the PM with Mandatory Cost Share.
Instructions for Exporting to Excel

Use these instructions to export from any table or visualization:

1. Click the 3 vertical dots in the upper right-hand corner of the data set. If they are not immediately visible, hover near the corner and they will appear.

2. Select Export.

3. Select File.

4. Use the dropdown menu to select the Format.
   a. Select Data (csv) for data values only.
   b. Choose from PowerPoint (pptx), Acrobat (pdf), or Image (png) for visual charts.

5. Click Save. Depending on the settings on your web browser, it will either save automatically to the Downloads file on your computer, or prompt you to select a desired location.

! Note: Only one report can be exported at a time. It is not possible to export the entire tab of reports at once.
Frequently Asked Questions

Q: Why does the dashboard open to someone else’s project?
A: The dashboard must populate upon opening. Once a user updates the Project Manager filter, the system will retain that setting and open to the same dataset in the future.

Q: Why is the transaction I just entered not showing on the dashboard?
A: The dashboard updates once daily, so content will always appear 1 day behind.

Q: My project is not visible.
A: A project must have some activity to appear on the dashboard. If it has been created and has a budget, but no transactions have been processed, then the project will not appear on the dashboard.
   ➢ If a project has transactions and still is not being displayed, try resetting the filters.

Q: I am a Co-PI on a project, but I cannot see the project data when I enter my name in the Project Manager filter.
A: For projects with multiple PI’s, it is necessary to enter the name of the Lead PI in the Project Manager filter for the dashboard to display the related data.