

PI Dashboard portlet descriptions

Alerts and Notifications

This portlet provides an area to highlight other portlets in the PI Dashboard where a review may be needed. Alerts are meant to indicate review/action is needed. They are categorized into yellow (warning) and red (urgent review) for areas such as: “Projected expenses exceed budget,” “Key personnel commitments are insufficient” and “Effort cards remain uncertified.” Notifications in this portlet will remind investigators on items such as “Monthly expense reports are available for review/certification,” “30-day budget period expiration notices” and “Proposals pending over 12 months.” Investigators should review and communicate/coordinate all needed actions with appropriate administrative staff.

Active Awards Summary

The Active Awards Summary lists all active projects for an Investigator. Projects in which the investigator is the overall project PI will include overall summary information for the current budget period. For projects in which the investigator is the Co-I, the portlet will display the subproject index for which the Co-I is responsible for financial management only.

Active Index Status

This portlet displays a graphic representation of the current status of all active indexes to which a PI has fiscal responsibility, either as the PI of the overall project, or as a Co-I with a sub-project. The grey rectangular box represents the active budget period. Inset within that box are expenditure, commitment, and time elapsed graphics. This allows investigators to see how their expenditures and commitments align with the time elapsed during a given budget period. Clicking on the graphic allows the Investigator to drill into a financial summary for the index.

Pending Proposals

The Pending Proposals portlet provides Investigators a list of pending projects and their current status.

Personnel Commitments

My Commitments outlines for an investigator all of their commitments to current projects and gives a calculation of % effort based on current salary labor distributions in the HR system. Individuals on My Projects is a list of all personnel currently charged to an investigators projects and their committed and calculated effort for the current budget period.

Reports

This portlet lists all of the Reports that are available to investigators in the PI Dashboard. Investigators are required to review and certify their Monthly Expense Reports for all active indexes which they manage. In addition there are other reports available to aid in the management of their projects such as: Payroll Distribution by Effort Period, Research Portfolio Summary, Active Awards list Detail, and Active and Pending Support. Investigators also have access to archived Monthly Expense Reports and lists of projects Closed or In-Closeout.

Active Awards Distribution by Sponsor

This portlet is intended to give an Investigator a visual representation of the sponsor diversity of their portfolio. The pie chart represents active awards by sponsor type where the Investigator is the PI. Clicking on the pie chart will detail all the awards which make up the total figure displayed on the pie chart. This chart does not include awards on which an individual is designated as a sub-project PI. An investigator can also select to view awards they are associated with as Sub-Project PI by clicking on the link [Active Award Distribution By Sponsor Type (As Sub-Project PI)] at the bottom of the portlet.

RA Dashboard portlet descriptions

My Researchers

This portlet provides summary-level information for all investigators with active research managed in your department/division. Clicking on an individual investigator's hyperlinked name will take you to their individual PI Dashboard. More detailed information can be accessed by clicking on the "View Award Details" link which will generate a report listing all of the awards currently active within your department/division that is fully exportable to Microsoft Excel.

Active Index Status

Active index status provides a way to quickly review the financial status of the active indexes within your department/division. The default view displays graphic representations of awards where actual expenditures are currently greater than 100 percent of the budget for all active indexes within your department/division. This includes indexes on which an investigator in your department/division is listed as a subproject PI.

Pending Proposals

Pending proposals provides a list of pending projects and their current status in the InfoEd system. You can filter to view the project statuses of a particular investigator or filter based on proposals pending for longer than nine or 12 months, proposals under development, proposals in the pre-award process and proposals under sponsor review.

Deficit Monitoring

Deficit monitoring displays indexes within your department/division which are in a deficit status for longer than one month. The portlet provides current budget balance and cash balance as well as the number of months the index has been in deficit. You can use the filters to focus on indexes in deficit greater than three months or to separate out industry clinical trial indexes from all other awards.

Budget Periods Ending

Budget periods ending displays awards within your department/division that are nearing the budget period end date. The default view shows awards with 30 days or less until the next budget period end date. The portlet provides information helpful when transitioning into a new budget period, such as days until expired, number of personnel assigned and whether or not a new index is needed each budget period.

Projects in Closeout

This portlet provides tools to manage the closeout of awards that have passed the project period end date. Information displayed includes: days since project period end date, days since last expense hit the award, number of personnel assigned to the award and the number of open encumbrances.

Cost Share

The cost share portlet aids in the management of cost share commitments within your department/division. Displayed are awards that have mandatory and voluntary committed cost share recorded in InfoEd.

NIH Over-the-cap Salary

NIH over-the-cap salary shows all personnel charged to NIH awards within your department/division in the current budget period and who have Institutional Base Salary (IBS) over the current NIH cap (\$183,300 as of January 2015).

Alerts and Notifications

The alerts and notifications portlet in the RA Dashboard displays all of the alerts and notifications associated with investigators in your department/division. These are the same alerts that show up on an individual's PI Dashboard and are meant to indicate review/action is needed.

Personnel Commitments

Personnel commitments provides a list of all personnel currently charged to all awards within your department/division. Individuals' committed and calculated effort levels for the current budget period are displayed. Similar to the PI Dashboard, red and green indicators draw attention to personnel commitments that may need to be reviewed.

Award Distribution by Sponsor Type

Award distribution by sponsor type provides a visual representation of the sponsor diversity of a department/division's portfolio. The pie chart represents active awards by sponsor type that are managed by the department/division. This chart does not include awards on which an investigator is designated as a subproject PI.