
PI Dashboard User Guide

Release 4

Monthly Run Rate Report

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WASHINGTON, DC



GW Business Intelligence
- turning GW data into actionable insight -

Monthly Run Rate Report-Release 4

- Summarizes an award's total expenses by month and calculates the average monthly expenditure.
- Estimates the project's total expenditures to the end of the award and will predict if the award will go over or under budget.
- Accessible through the PI Dashboard's More Tools tab: <http://research.gwu.edu/pi-dashboard-visualizations>

If you are accessing the site remotely, click the link to sign into VPN first then return to the PI Dashboard.

The screenshot shows a Firefox browser window displaying the PI Dashboard website. The address bar shows the URL research.gwu.edu/pi-dashboard. The page features a navigation menu with tabs for ABOUT, SPONSORED PROJECTS, PI DASHBOARD (selected), COMPLIANCE, ENTREPRENEURSHIP, TECHNOLOGY TRANSFER, and NEWS. Below the navigation, a breadcrumb trail reads "You are here: Home / PI Dashboard". A left sidebar contains a list of links: HOME PAGE, VISUALIZATIONS, SUMMARY & DETAIL REPORTS, TRAINING MATERIALS, DATA DICTIONARY, FREQUENTLY ASKED QUESTIONS, and FEATURES UNDER DEVELOPMENT. The main content area is titled "PI Dashboard" and includes a welcome message: "Welcome to the Principal Investigator (PI) Dashboard!". It explains that the Office of the Vice President for Research has partnered with the Division of Information Technology to provide Principal Investigators with powerful online tools to access personalized award information. A note states that access is secured and must be granted for each individual user, with a request to email pidash@gwu.edu for access. A list of required information includes Full Name and GW NetID. It also mentions that users with access can use their GW NetID credentials. A note for remote access states that a secure VPN connection is required, with a link to <https://vpn.gwu.edu/> highlighted in a red box. The page is powered by IT, as indicated by a banner for "Research Resources Powered by IT" from the Division of Information Technology, and another banner for "University Libraries Resources". At the bottom, there is a section for "Interactive Visualizations" with a legend for Deficit, Encumbrance, Actual, and Balance.

Click the Interactive Visualizations link or image.

GW PI Dashboard | Office of the Vice Preside...

research.gwu.edu/pi-dashboard

FREQUENTLY ASKED QUESTIONS

FEATURES UNDER DEVELOPMENT

tools to make more informed project decisions by viewing financial and human resources information about awards at summarized and detailed levels.

Due to the sensitive nature of the PI Dashboard's data, access is secured and must be granted for each individual user. To request access to the PI Dashboard, please send an email to pidash@gwu.edu with your:

- Full Name
- GW NetID

Those who already have access may use their GW NetID credentials whenever prompted to log in.

If you are accessing this page from outside of the GW network, you must establish a secure VPN connection before being able to log into the PI Dashboard. Please visit this page to sign into VPN first: <https://vpn.gwu.edu>

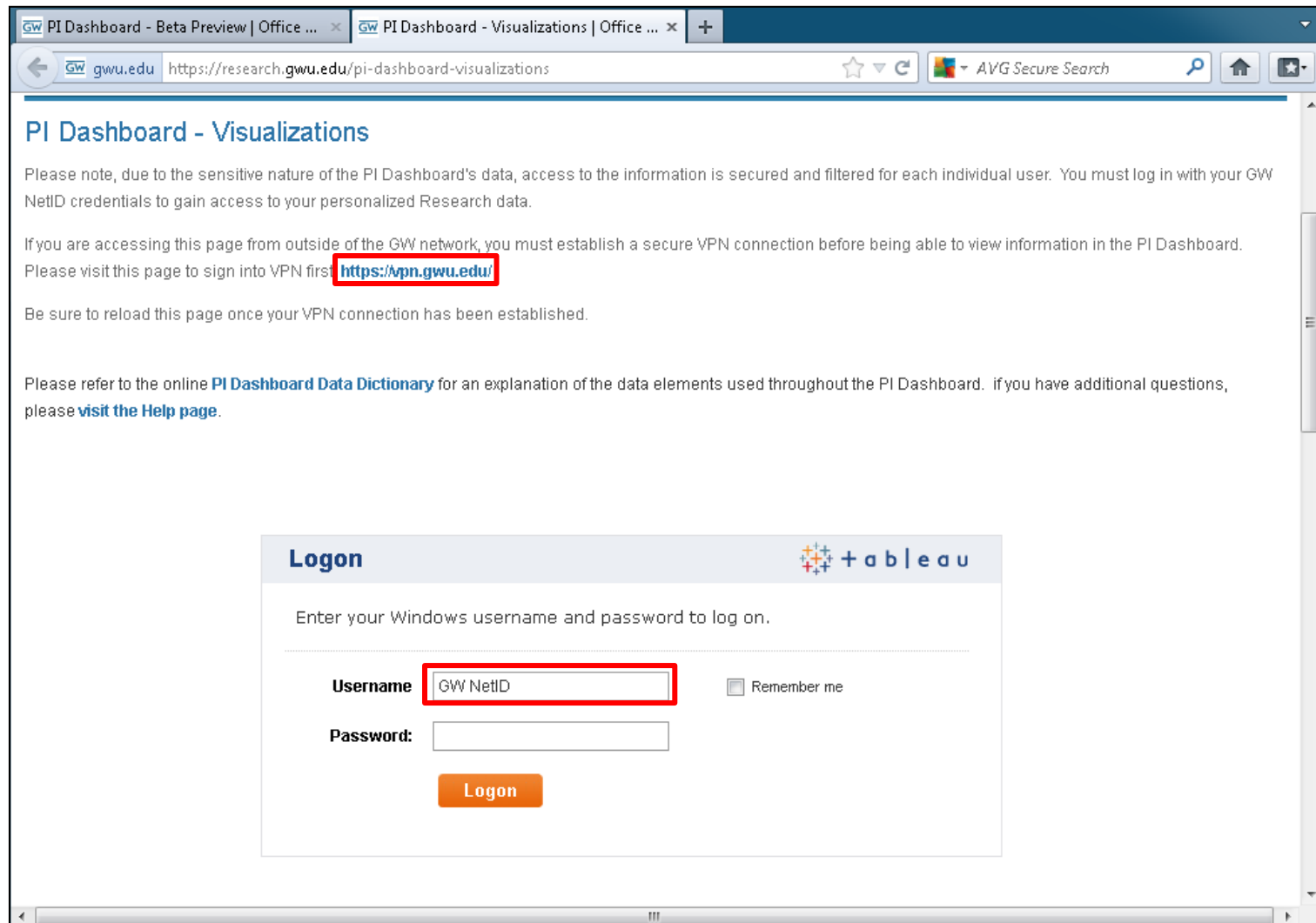
University Libraries Resources

Interactive Visualizations

Expenditure Category	Actual	Encumbran...	Balance (Deficit)	Burn Rate
COMPENSATION	\$166,752.05	\$0.00	(\$1,947.05)	101.18%
CONVERSION	\$0.00	\$0.00	\$4,000.00	0.00%
FRINGE BENEFITS EXPENSE	\$41,477.95	\$0.00	\$9,209.05	81.83%
INDIRECT COSTS	\$139,320.79	\$0.00	\$4,693.21	96.74%
SERVICES	\$17,500.00	\$0.00	(\$17,500.00)	0.00%
STUDENT SUPPORT	\$14,222.94	\$0.00	\$17,379.06	45.01%
SUPPLIES	\$4,133.70	\$0.00	\$7,441.30	35.71%
TRAVEL	\$7,732.16	\$0.00	\$20,584.82	27.31%
TRAVEL-DOMESTIC	\$42,110.45	\$0.00	(\$42,110.45)	0.00%
TRAVEL-FORIGN	\$1,748.91	\$0.00	(\$1,748.91)	0.00%
Grand Total	\$434,998.97	\$0.00	\$1.03	100.00%

Interact with charts and graphs that feature an overview list of your awards, plus the ability to view a breakdown of award expenditure details with the percent spent of each expenditure category's budget.

When a new window opens, sign in with your GW NetID credentials. If you do not see a login prompt, connect to VPN and then reload the page.



The screenshot shows a web browser window with the following elements:

- Browser Tabs:** "GW PI Dashboard - Beta Preview | Office ..." and "GW PI Dashboard - Visualizations | Office ...".
- Address Bar:** "https://research.gwu.edu/pi-dashboard-visualizations".
- Page Title:** "PI Dashboard - Visualizations".
- Text Content:**
 - "Please note, due to the sensitive nature of the PI Dashboard's data, access to the information is secured and filtered for each individual user. You must log in with your GW NetID credentials to gain access to your personalized Research data."
 - "If you are accessing this page from outside of the GW network, you must establish a secure VPN connection before being able to view information in the PI Dashboard. Please visit this page to sign into VPN first <https://vpn.gwu.edu/>" (The URL is highlighted with a red box).
 - "Be sure to reload this page once your VPN connection has been established."
 - "Please refer to the online [PI Dashboard Data Dictionary](#) for an explanation of the data elements used throughout the PI Dashboard. If you have additional questions, please [visit the Help page](#)."
- Login Form:**
 - Title:** "Logon" with the Tableau logo.
 - Instruction:** "Enter your Windows username and password to log on."
 - Username Field:** Labeled "Username", containing "GW NetID" (highlighted with a red box).
 - Remember me:** A checkbox labeled "Remember me".
 - Password Field:** Labeled "Password:", currently empty.
 - Logon Button:** An orange button labeled "Logon".

To view Monthly Run Rate: click the “More Tools” tab, then click the check mark beside “Monthly Run Rate”.

Click this tab to view other related reports

PI Dashboard **More Tools**

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More Tools

These links will take you to a separate GW site where you can log in with your GW NetID

CERTIFIED QUALITY GW BI

Logged in as: ead.gwu.edu/louyang



Summary and Detail Reports

Access summary and detail information in a table format. Reports show a list of awards at the summary level with the ability to drill down into details on budget, encumbrances, and actuals.



Monthly Run Rate


What is an award's average monthly expenditure and when will the budget run out?



Labor Effort

What percent of a person's labor distribution was paid from an award?

Once you choose the Monthly Run Rate button, another window will open and you will be asked to login using your NetID and password.

Log on [Help](#) 

Please type your credentials for authentication.

Namespace:
GW_NetID

User ID:

Password:

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and service names might be trademarks of IBM or
other companies.

After logging in, you will be prompted to select a PI from the list (**required**). You have the option to pick from the Award Status box. If you click “View Awards”, you will be able to pick and choose which awards you would like to see the Monthly Run Rate for. You also have the option to enter a Project Number.

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DATA WAREHOUSE

Award Monthly Run Rate

Prompt Page
Release 4

Please select Principal Investigator (required):

- * Doe, John
- Doebel, Hartmut
- Doering, Michael
- Doherty, Steven
- Dolling, David
- Donaldson, Robert
- Donnelly, Richard
- Donnels, Linda
- Dopkins, Stephen
- Dor, Avi
- Doroslovacki, Milos

[View Awards >>](#)

[Select all](#) [Deselect all](#)

Please select Award Status (optional):

- ACTIVE
- AT_RISK
- CLOSED
- ON_HOLD

[Select all](#) [Deselect all](#)

Select Award Number (optional) - Select a PI and click View Awards >>

- CCLS00066F - Sample Award 66
- CCLS00098F - Sample Award 98
- CCNS00005F - Sample Award 5
- CCNS00007F - Sample Award 7
- CCNS00008F - Sample Award 8
- CCNS00009F - Sample Award 9
- CCNS00011F - Sample Award 11
- CCNS00012N - Sample Award 12
- IXXS00006N - Sample Award 6
- IXXS00050N - Sample Award 50

[Select all](#) [Deselect all](#)

Or enter Project Number (optional):

Once you have selected the required criteria, click “Finish”.

Please select Principal Investigator (required):

* Doe, John

- Doebel, Hartmut
- Doering, Michael
- Doherty, Steven
- Dolling, David
- Donaldson, Robert
- Donnelly, Richard
- Donnels, Linda
- Dopkins, Stephen
- Dor, Avi
- Doroslovacki, Milos

[Select all](#) [Deselect all](#)

Please select Award Status (optional):

- ACTIVE
- AT_RISK
- CLOSED
- ON_HOLD

[Select all](#) [Deselect all](#)

Select Award Number (optional) - Select a PI and click View Awards >>

- CCLS00066F - Sample Award 66
- CCLS00098F - Sample Award 98
- CCNS00005F - Sample Award 5
- CCNS00007F - Sample Award 7
- CCNS00008F - Sample Award 8
- CCNS00009F - Sample Award 9
- CCNS00011F - Sample Award 11
- CCNS00012N - Sample Award 12
- IXS00006N - Sample Award 6
- IXS00050N - Sample Award 50

[Select all](#) [Deselect all](#)

Or enter Project Number (optional):

Once you click the “Finish” button, the Monthly Run Rate report will be generated. See example below.

THE GEORGE WASHINGTON UNIVERSITY WASHINGTON, DC DATA WAREHOUSE Administrator About IBM

Award Monthly Run Rate

Release 4

< Return to Prompt Page

Data refreshed on: Jan 15, 2015 8:00:08 AM

P/T/A: 10005/1/CCLS00098F ⓘ ⓘ

Award Short Name: Sample Award 98
Award Status: ACTIVE
PI Name: Doe, John

Award Start Date: 06/01/2010
Award End Date: 05/31/2015
Award Close Date: 06/29/2015

Funding Source: Funding Source 98
Banner Index: 830373

Budget Amount	Encumbrance Amount	Actual Amount	Spending Level	Average Monthly Expenditure (Last 6 Months)	# of Months to Award End Date	Estimated # of Months Until Balance Runs Out	Projected Expenditures to End of Award	Remaining Balance w/ll approximately last until	Will Projection w/ll go over/under Budget?
2,458,250.39	99,023.27	1,980,843.81	84.61%	41,328.30	4	9.16	2,245,180.30	Oct 15, 2015	UNDER

Expenses by Month:

01/2014	02/2014	03/2014	04/2014	05/2014	06/2014	07/2014	08/2014	09/2014	10/2014	11/2014	12/2014	Total (Last 6 Months)
35,296.73	38,051.38	45,507.07	35,706.76	43,841.06	50,486.02	52,665.50	40,298.88	12,381.36	66,627.75	37,636.99	38,359.35	247,969.83

P/T/A: 10005/14/CCLS00066F ⓘ ⓘ

Award Short Name: Sample Award 66
Award Status: ACTIVE
PI Name: Doe, John

Award Start Date: 06/01/2011
Award End Date: 05/31/2015
Award Close Date: 08/29/2015

Funding Source: Funding Source 66
Banner Index: 836901

Budget Amount	Encumbrance Amount	Actual Amount	Spending Level	Average Monthly Expenditure (Last 6 Months)	# of Months to Award End Date	Estimated # of Months Until Balance Runs Out	Projected Expenditures to End of Award	Remaining Balance w/ll approximately last until	Will Projection w/ll go over/under Budget?
2,938,623.00	222,273.47	2,691,422.45	99.15%	37,840.64	4	0.66	3,065,058.46	Feb 15, 2015	OVER

Expenses by Month:

01/2014	02/2014	03/2014	04/2014	05/2014	06/2014	07/2014	08/2014	09/2014	10/2014	11/2014	12/2014	Total (Last 6 Months)
32,712.09	28,650.05	9,671.09	11,669.31	252,190.03	25,256.84	4,878.23	10,196.83	124,899.32	35,783.61	4,878.23	46,407.59	227,043.81

Calculate average based on:

- Last 12 months
- Last 6 Months
- Last 3 Months
- Last 2 Months
- Last 1 Month

Select Award/s (optional):

- CCLS00013F - Sample Award 13
- CCLS00014F - Sample Award 14
- CCLS00015F - Sample Award 15
- CCLS00017F - Sample Award 17
- CCLS00032F - Sample Award 32
- CCLS00045F - Sample Award 45
- CCLS00046F - Sample Award 46
- CCLS00047F - Sample Award 47
- CCLS00051F - Sample Award 51
- CCLS00066F - Sample Award 66

Select All Deselect All

Refresh

! Award Personnel
! Award Mapping and Info

The average Monthly Expenditure can be changed by selecting a different range in the “Calculate Average Based on” prompt box. Click “Refresh”.

Please visit online resources for additional help.

- Training materials:

<http://research.gwu.edu/pi-dashboard-training-materials>

- FAQs:

<http://research.gwu.edu/pi-dashboard-help>

- Data Dictionary for the Monthly Run Rate report:

<https://gwu.colibra.com/term/210c29b1-4500-4e00-9f1e-1ebacdb75af7#!=>