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# PI Dashboard User Guide

Release 6

## Summary & Detail Reports

THE GEORGE  
WASHINGTON  
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WASHINGTON, DC

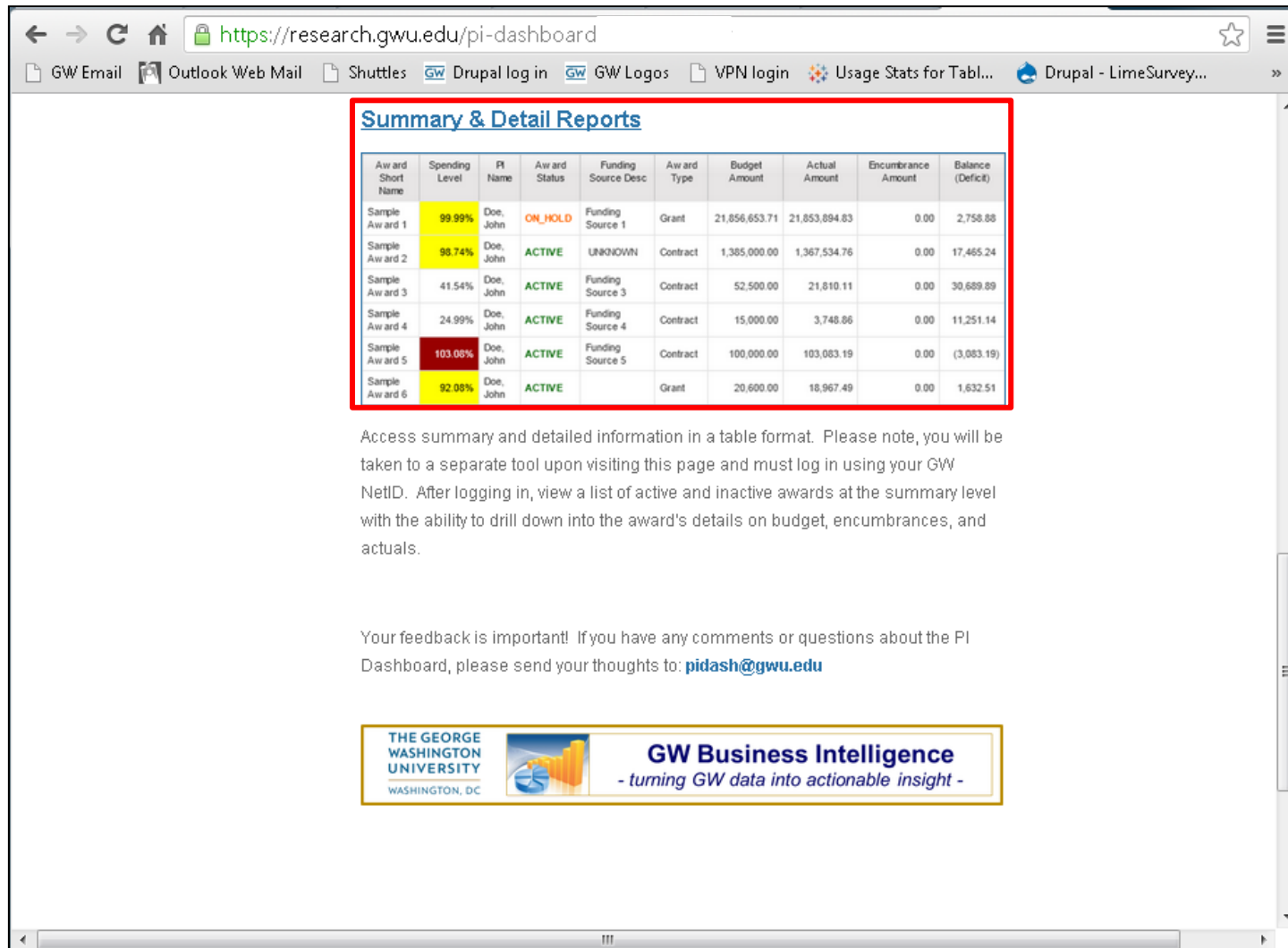


**GW Business Intelligence**  
*- turning GW data into actionable insight -*

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](https://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 dashboard provides personalized award information and is secured for individual users. A list of required information for access includes Full Name and GW NetID. A note states that users with access can use their GW NetID credentials. A key instruction for remote access is highlighted: "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/>". Below this, there is a section for "Interactive Visualizations" with a legend for Deficit, Encumbrance, Actual, and Balance.

# Click the Summary & Detail Reports link or image.





[Summary & Detail Reports](#)

Award Short Name	Spending Level	PI Name	Award Status	Funding Source Desc	Award Type	Budget Amount	Actual Amount	Encumbrance Amount	Balance (Deficit)
Sample Award 1	99.99%	Doe, John	ON_HOLD	Funding Source 1	Grant	21,856,653.71	21,853,894.83	0.00	2,758.88
Sample Award 2	98.74%	Doe, John	ACTIVE	UNKNOWN	Contract	1,385,000.00	1,367,534.76	0.00	17,465.24
Sample Award 3	41.54%	Doe, John	ACTIVE	Funding Source 3	Contract	52,500.00	21,810.11	0.00	30,689.89
Sample Award 4	24.99%	Doe, John	ACTIVE	Funding Source 4	Contract	15,000.00	3,748.86	0.00	11,251.14
Sample Award 5	103.08%	Doe, John	ACTIVE	Funding Source 5	Contract	100,000.00	103,083.19	0.00	(3,083.19)
Sample Award 6	92.08%	Doe, John	ACTIVE		Grant	20,600.00	18,967.49	0.00	1,632.51

Access summary and detailed information in a table format. Please note, you will be taken to a separate tool upon visiting this page and must log in using your GW NetID. After logging in, view a list of active and inactive awards at the summary level with the ability to drill down into the award's details on budget, encumbrances, and actuals.

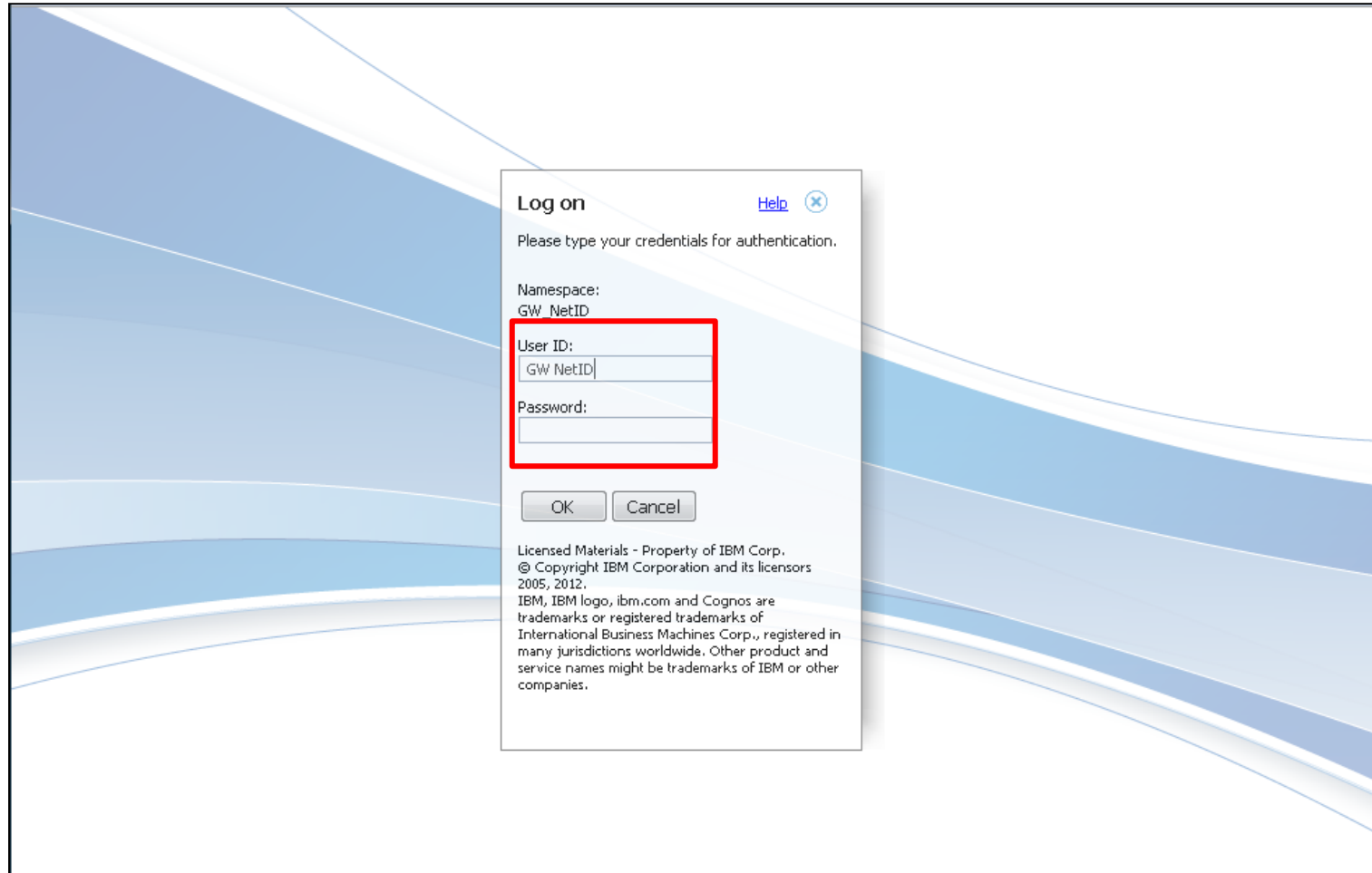
Your feedback is important! If you have any comments or questions about the PI Dashboard, please send your thoughts to: [pidash@gwu.edu](mailto:pidash@gwu.edu)



**GW Business Intelligence**  
- turning GW data into actionable insight -

# When the new window opens, sign in with your GW NetID credentials.

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The Prompt Page offers optional criteria to tailor the report. Your choices may differ from this example. Make any choices you'd like, then click Finish or if you'd like to view additional filters, click on More Filters.

THE GEORGE WASHINGTON UNIVERSITY WASHINGTON, DC DATA WAREHOUSE

- P/T/A Budget, Encumbrance and Actuals

Log On | Home | About

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Please select Principal Investigator (optional):

Doe, John

Select all Deselect all

Please select Award Status (optional):

ACTIVE  
AT RISK  
CLOSED  
ON HOLD

Select all Deselect all

Please enter Project Number (optional):


OR enter Award Number eg. EENS91173F (optional):

Cancel More Filters > Finish

The 2<sup>nd</sup> prompt page offers more optional criteria to tailor the report. Make any choices you'd like, then click Finish or click <Back to return to the previous prompt page.

**Award Summary**  
Prompt Page  
Release 6

Select Awards with Start Date (mm/dd/yyyy) from (optional):

Jul 1, 1971 

Select Award Org/s (optional):

813211 - MICROBIOLOGY IMMUNOLOGY & TROPICAL MEDICINE  
870011 - SPHHS GENERAL CENTER  
870031 - SPHHS RESEARCH ADMIN  
872411 - EPIDEMIOLOGY BIostatISTICS

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

Select Funding Source/s (optional):

COST SHARING  
DC GOVERNMENT - DEPARTMENT OF HEALTH  
ELIZABETH GLASER PEDIATRIC AIDS FOUNDATI  
FHI DEVELOPMENT 360 LLC  
HHS/NATIONAL INSTITUTES OF HEALTH-LOC

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


Select Banner Index/es (optional):

830373  
830377  
830389  
830393  
836901  
836902  
836956  
836957  
836959  
836960  
836962

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

Cancel   < Back   Finish

Tip: You can enter the Start Date by typing in a date in a mm/dd/yyyy format.

01/01/2015 

# Here's a sample Award Summary report. Criteria choices appear in checklists. You may check/uncheck criteria and click Refresh to view an updated report.

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 WASHINGTON, DC

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- P/T/A Budget, Encumbrance and Actuals

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Award Summary

[< Return to Prompt Page](#)

Project Task Award	Award Short Name	Spending Level		PI Name	Award Start Date	Award End Date	Award Status	Award Type	Award Organization	Banner Index	Funding Source	Budget Amount	Total Expenditures to date	Encumbrance Amount	Balance (Deficit)	Notification/s
<a href="#">10023-1-CCNS00047A</a>	Sample Award 47	98.74%		Doe, John	10/01/2005	09/30/2012	ON_HOLD	Contract	ORER (INSTITUTE FOR EDUCATION STUDIES RESEARCH) - 161101	163251	Funding Source 47	1,385,000.00	1,367,534.76	0.00	17,465.24	
<a href="#">10033-1-EENS00001N</a>	Sample Award 1	0.00%		Doe, John	01/31/2014	06/30/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164126	Funding Source 1	30,000.00	0.00	0.00	30,000.00	
<a href="#">10043-1-EENS00006F</a>	Sample Award 6	93.91%		Doe, John	11/01/2012	10/31/2013	ON_HOLD	Grant	CURRICULUM AND PEDAGOGY - 160116	164118	Funding Source 6	20,600.00	19,346.37	0.00	1,253.63	
<a href="#">10044-1-EENS00005F</a>	Sample Award 5	95.58%		Doe, John	02/15/2013	09/30/2013	ON_HOLD	Contract	CURRICULUM AND PEDAGOGY - 160116	164119	Funding Source 5	17,500.00	16,725.92	0.00	774.08	
<a href="#">10045-1-EENS00004N</a>	Sample Award 4	98.94%		Doe, John	05/06/2013	06/13/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164120	Funding Source 4	81,500.00	80,639.39	0.00	860.61	Award ends in 78 day/s
<a href="#">10046-1-EENS00003F</a>	Sample Award 3			Doe, John	05/14/2013	08/12/2013	AT_RISK	Contract	CURRICULUM AND PEDAGOGY - 160116	164121	Funding Source 3	0.00	0.00	0.00	0.00	
<a href="#">10047-1-EENS00014N</a>	Sample Award 14	55.16%		Doe, John	07/01/2011	12/31/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164109	Funding Source 14	52,500.00	28,958.54	0.00	23,541.46	
<a href="#">10047-2-</a>	Sample	27.51%		Doe	07/01/2014	12/31/2014	ACTIVE	Contract	CURRICULUM	164110	Funding	15,000.00	4,127.11	0.00	10,872.89	

PI Full Name (optional):

Doe, John

[Select all Dese](#)

Award Status (optional):

ACTIVE  
 AT\_RISK  
 CLOSED  
 ON\_HOLD

[Select all Dese](#)

Spending Level for Open Awards

90-99.99% Spent

Over 100% Spent

Award Personnel

Award Mapping and Info

Use Standard Colors  
 Use ADA Compliant Colors

# You can also click the Return to Prompt Page button to go back to the original Prompt Page criteria screen to make changes and run the report again.

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- P/T/A Budget, Encumbrance and Actuals

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### Award Summary

Project Task Award	Award Short Name	Spending Level		PI Name	Award Start Date	Award End Date	Award Status	Award Type	Award Organization	Banner Index	Funding Source	Budget Amount	Total Expenditures to date	Encumbrance Amount	Balance (Deficit)	Notification/s
<a href="#">10023-1-CCNS00047A</a>	Sample Award 47	98.74%	ⓘ ⓘ	Doe, John	10/01/2005	09/30/2012	ON_HOLD	Contract	ORER (INSTITUTE FOR EDUCATION STUDIES RESEARCH) - 161101	163251	Funding Source 47	1,385,000.00	1,367,534.76	0.00	17,465.24	
<a href="#">10033-1-EENS00001N</a>	Sample Award 1	0.00%	ⓘ ⓘ	Doe, John	01/31/2014	06/30/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164126	Funding Source 1	30,000.00	0.00	0.00	30,000.00	
<a href="#">10043-1-EENS00006F</a>	Sample Award 6	93.91%	ⓘ ⓘ	Doe, John	11/01/2012	10/31/2013	ON_HOLD	Grant	CURRICULUM AND PEDAGOGY - 160116	164118	Funding Source 6	20,600.00	19,346.37	0.00	1,253.63	
<a href="#">10044-1-EENS00005F</a>	Sample Award 5	95.58%	ⓘ ⓘ	Doe, John	02/15/2013	09/30/2013	ON_HOLD	Contract	CURRICULUM AND PEDAGOGY - 160116	164119	Funding Source 5	17,500.00	16,725.92	0.00	774.08	
<a href="#">10045-1-EENS00004N</a>	Sample Award 4	98.94%	ⓘ ⓘ	Doe, John	05/06/2013	06/13/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164120	Funding Source 4	81,500.00	80,639.39	0.00	860.61	Award ends in 78 day/s
<a href="#">10046-1-EENS00003F</a>	Sample Award 3		ⓘ ⓘ	Doe, John	05/14/2013	08/12/2013	AT_RISK	Contract	CURRICULUM AND PEDAGOGY - 160116	164121	Funding Source 3	0.00	0.00	0.00	0.00	
<a href="#">10047-1-EENS00014N</a>	Sample Award 14	55.16%	ⓘ ⓘ	Doe, John	07/01/2011	12/31/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164109	Funding Source 14	52,500.00	28,958.54	0.00	23,541.46	
<a href="#">10047-2-</a>	Sample	27.51%	ⓘ ⓘ	Doe	07/01/2011	12/31/2014	ACTIVE	Contract	CURRICULUM	164110	Funding	15,000.00	4,127.11	0.00	10,872.89	

PI Full Name (optional):

Doe, John

[Select all Dese](#)

Award Status (optional):

ACTIVE  
 AT\_RISK  
 CLOSED  
 ON\_HOLD

[Select all Dese](#)

Refresh

Spending Level for Open Awards

90-99.99% Spent

Over 100% Spent


ⓘ Award Personnel

ⓘ Award Mapping and Info

Use Standard Colors  
 Use ADA Compliant Colors





# Use the legend to identify colored cells, as well as clickable icons that open additional detail reports.









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- P/T/A Budget, Encumbrance and Actuals

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[< Return to Prompt Page](#)      **Award Summary**

Project Task Award	Award Short Name	Spending Level		PI Name	Award Start Date	Award End Date	Award Status	Award Type	Award Organization	Banner Index	Funding Source	Budget Amount	Total Expenditures to date	Encumbrance Amount	Balance (Deficit)	Notification/s
<a href="#">10023-1-CCNS00047A</a>	Sample Award 47	98.74%	 	Doe, John	10/01/2005	09/30/2012	ON_HOLD	Contract	ORER (INSTITUTE FOR EDUCATION STUDIES RESEARCH) - 161101	163251	Funding Source 47	1,385,000.00	1,367,534.76	0.00	17,465.24	
<a href="#">10033-1-EENS00001N</a>	Sample Award 1	0.00%	 	Doe, John	01/31/2014	06/30/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164126	Funding Source 1	30,000.00	0.00	0.00	30,000.00	
<a href="#">10043-1-EENS00006F</a>	Sample Award 6	93.91%	 	Doe, John	11/01/2012	10/31/2013	ON_HOLD	Grant	CURRICULUM AND PEDAGOGY - 160116	164118	Funding Source 6	20,600.00	19,346.37	0.00	1,253.63	
<a href="#">10044-1-EENS00005F</a>	Sample Award 5	95.58%	 	Doe, John	02/15/2013	09/30/2013	ON_HOLD	Contract	CURRICULUM AND PEDAGOGY - 160116	164119	Funding Source 5	17,500.00	16,725.92	0.00	774.08	
<a href="#">10045-1-EENS00004N</a>	Sample Award 4	98.94%	 	Doe, John	05/06/2013	06/13/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164120	Funding Source 4	81,500.00	80,639.39	0.00	860.61	Award ends in 78 day/s
<a href="#">10046-1-EENS00003F</a>	Sample Award 3		 	Doe, John	05/14/2013	08/12/2013	AT_RISK	Contract	CURRICULUM AND PEDAGOGY - 160116	164121	Funding Source 3	0.00	0.00	0.00	0.00	
<a href="#">10047-1-EENS00014N</a>	Sample Award 14	55.16%	 	Doe, John	07/01/2011	12/31/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164109	Funding Source 14	52,500.00	28,958.54	0.00	23,541.46	

PI Full Name (optional):

Doe, John

[Select all D](#)

Award Status (optional):


ACTIVE  
 AT\_RISK  
 CLOSED  
 ON\_HOLD


[Select all D](#)

Spending Level for Open Award

90-99.99% Spent

Over 100% Spent

 Award Personnel

 Award Mapping and Info

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Use Standard Colors

Use ADA Compliant Colors

# The same report can be viewed using ADA compliant colors. Click the radio button to enable this feature.

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< Return to Prompt Page **Award Summary**

Project Task Award	Award Short Name	Spending Level	PI Name	Award Start Date	Award End Date	Award Status	Award Type	Award Organization	Banner Index	Funding Source	Budget Amount	Total Expenditures to date	Encumbrance Amount	Balance (Deficit)	Notification/s
<a href="#">10023-1-CCNS00039A</a>	Sample Award 39	98.74%	Doe, John	10/01/2005	09/30/2012	ON_HOLD	Contract	ORER (INSTITUTE FOR EDUCATION STUDIES RESEARCH) - 161101	163251	Funding Source 39	1,385,000.00	1,367,534.76	0.00	17,465.24	
<a href="#">10033-1-EENS00002N</a>	Sample Award 2	0.00%	Doe, John	01/31/2014	06/30/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164126	Funding Source 2	30,000.00	0.00	0.00	30,000.00	
<a href="#">10043-1-EENS00006F</a>	Sample Award 6	93.91%	Doe, John	11/01/2012	10/31/2013	ON_HOLD	Grant	CURRICULUM AND PEDAGOGY - 160116	164118	Funding Source 6	20,600.00	19,346.37	0.00	1,253.63	
<a href="#">10044-1-EENS00005F</a>	Sample Award 5	95.58%	Doe, John	02/15/2013	09/30/2013	ON_HOLD	Contract	CURRICULUM AND PEDAGOGY - 160116	164119	Funding Source 5	17,500.00	16,725.92	0.00	774.08	
<a href="#">10045-1-EENS00004N</a>	Sample Award 4	98.94%	Doe, John	05/06/2013	06/13/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164120	Funding Source 4	81,500.00	80,639.39	0.00	860.61	Award ends in 77 day/s
<a href="#">10046-1-EENS00003F</a>	Sample Award 3		Doe, John	05/14/2013	08/12/2013	AT_RISK	Contract	CURRICULUM AND PEDAGOGY - 160116	164121	Funding Source 3	0.00	0.00	0.00	0.00	
<a href="#">10047-1-EENS00014N</a>	Sample Award 14	55.16%	Doe, John	07/01/2011	12/31/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164109	Funding Source 14	52,500.00	28,958.54	0.00	23,541.46	

Use Standard Colors  
 Use ADA Compliant Colors

PI Full Name (optional):

- Aar
- Abe
- Abc
- Abr
- Acs
- Adc

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

Award Status (optional):

- ACTIVE
- AT\_RISK
- CLOSED
- ON\_HOLD

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

Refresh

Spending Level for Open Awards

- 90-99.99% Spent
- Over 100% Spent

- Award Personnel
- Award Mapping and Info

# Clicking on links and icons will each open a detail report for that award in a new window. The current report window will remain open for your reference.

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## Award Summary

Project Task Award	Award Short Name	Spending Level		PI Name	Award Start Date	Award End Date	Award Status	Award Type	Award Organization	Banner Index	Funding Source	Budget Amount	Total Expenditures to date	Encumbrance Amount	Balance (Deficit)	Notification/s
<a href="#">10023-1-CCNS00047A</a>	Sample Award 47	98.74%		Doe, John	10/01/2005	09/30/2012	ON_HOLD	Contract	ORER (INSTITUTE FOR EDUCATION STUDIES RESEARCH) - 161101	163251	Funding Source 47	1,385,000.00	1,367,534.76	0.00	17,465.24	
<a href="#">10033-1-EENS00001N</a>	Sample Award 1	0.00%		Doe, John	01/31/2014	06/30/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164126	Funding Source 1	30,000.00	0.00	0.00	30,000.00	
<a href="#">10043-1-EENS00006F</a>	Sample Award 6	93.91%		Doe, John	11/01/2012	10/31/2013	ON_HOLD	Grant	CURRICULUM AND PEDAGOGY - 160116	164118	Funding Source 6	20,600.00	19,346.37	0.00	1,253.63	
<a href="#">10044-1-EENS00005F</a>	Sample Award 5	95.58%		Doe, John	02/15/2013	09/30/2013	ON_HOLD	Contract	CURRICULUM AND PEDAGOGY - 160116	164119	Funding Source 5	17,500.00	16,725.92	0.00	774.08	
<a href="#">10045-1-EENS00004N</a>	Sample Award 4	98.94%		Doe, John	05/06/2013	06/13/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164120	Funding Source 4	81,500.00	80,639.39	0.00	860.61	Award ends in 78 day/s
<a href="#">10046-1-EENS00003F</a>	Sample Award 3			Doe, John	05/14/2013	08/12/2013	AT_RISK	Contract	CURRICULUM AND PEDAGOGY - 160116	164121	Funding Source 3	0.00	0.00	0.00	0.00	
<a href="#">10047-1-EENS00014N</a>	Sample Award 14	55.16%		Doe, John	07/01/2011	12/31/2014	ACTIVE	Contract	CURRICULUM AND PEDAGOGY - 160116	164109	Funding Source 14	52,500.00	28,958.54	0.00	23,541.46	

PI Full Name (optional):

Doe, John

[Select all D](#)

Award Status (optional):

ACTIVE  
 AT\_RISK  
 CLOSED  
 ON\_HOLD

[Select all De](#)

Refresh

Spending Level for Open Award

90-99.99% Spent

Over 100% Spent

Award Personnel  
 Award Mapping and Info

Use Standard Colors  
 Use ADA Compliant Colors

# Your detail report's criteria are shown in the header and along the right. Certain criteria may be required to drill down to more detailed reports.

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**DATA WAREHOUSE**

- Budget, Actual, Encumbrance - Drill Through

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**P-T-A: 10047-1-EENS00020N**

Award Short Name Sample Award 20	Award Start Date 07/01/2011	Funding Source Funding Source 20
Award Status ACTIVE	Award End Date 12/31/2014	Banner Index 164109
PI Name Doe, John	Award Close Date 03/31/2015	Period Date Range From Sep 30, 2011 to Jul 31, 2014

**Period Date Range (required):**

From:

To:

[Expand Expenditure Type +](#)

		Budget Amount	Period Actual *	Cumulative Actual *	Cumulative Encumbrance	Balance (Deficit)	Spending Level	In Funds Failed	In Suspense Account/s
Direct Cost	<a href="#">COMPENSATION</a>	2,240.00	0.00	0.00	0.00	2,240.00	0.00%	0.00	0.00
	<a href="#">FRINGE BENEFITS EXPENSE</a>	132.00	0.00	0.00	0.00	132.00	0.00%	0.00	0.00
	<a href="#">OCCUPANCY RENTAL</a>	4,320.00	7,650.00	7,650.00	0.00	(3,330.00)	177.08%	0.00	0.00
	<a href="#">PUBLICATIONS AND DUES</a>	0.00	10,039.09	10,039.09	80.91	(10,120.00)	-	0.00	0.00
	<a href="#">SUPPLIES</a>	923.00	39.16	39.16	0.00	883.84	4.24%	0.00	0.00
	<a href="#">TRAVEL</a>	0.00	0.00	0.00	0.00	0.00	-	0.00	0.00
	<a href="#">TRAVEL-DOMESTIC</a>	42,385.00	31,389.84	31,389.84	0.00	10,995.16	74.06%	0.00	0.00
<b>Total</b>		50,000.00	49,118.09	49,118.09	80.91	801.00	98.40%	0.00	0.00
Indirect Cost	<a href="#">INDIRECT COSTS</a>	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
	<b>Total</b>	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
<b>Total</b>		79,250.00	77,852.20	77,852.20	128.24	1,269.56	98.40%	0.00	0.00

**\* Excludes expenses in Funds Failed**

Spending Level Criteria

90-99.99% Spent

Over 100% Spent

Award Personnel


Award Mapping and Info

Use Standard Colors

Use ADA Compliant Colors

Release 3

# Reports may have required date criteria to select before you can drill down to more detail. You can type dates in the field, or use the dropdown calendar.



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P-T-A: 10047-1-EENS00020N ⓘ ⓘ

Period Date Range (required):

From: Sep 30, 2011 

To: 2011

Re: 2011

Sun Mon Tue Wed Thu Fri Sat

1 2 3

\* Excl: 4 5 6 7 8 9 10

Spend: 11 12 13 14 15 16 17

90-91

Over: 18 19 20 21 22 23 24

25 26 27 28 29 30

ⓘ Award Mapping and Info

Award Short Name: Sample Award 20  
Award Status: ACTIVE  
PI Name: Doe, John

Award Start Date: 07/01/2011  
Award End Date: 12/31/2014  
Award Close Date: 03/31/2015

Funding Source: Funding Source 20  
Banner Index: 164109  
Period Date Range: From Sep 30, 2011 to Jul 31, 2014

---

[Expand Expenditure Type +](#)

		Budget Amount	Period Actual *	Cumulative Actual *	Cumulative Encumbrance	Balance (Deficit)	Spending Level	In Funds Failed	In Suspense Account/s
Direct Cost	<a href="#">COMPENSATION</a>	2,240.00	0.00	0.00	0.00	2,240.00	0.00%	0.00	0.00
	<a href="#">FRINGE BENEFITS EXPENSE</a>	132.00	0.00	0.00	0.00	132.00	0.00%	0.00	0.00
	<a href="#">OCCUPANCY RENTAL</a>	4,320.00	7,650.00	7,650.00	0.00	(3,330.00)	177.08%	0.00	0.00
	<a href="#">PUBLICATIONS AND DUES</a>	0.00	10,039.09	10,039.09	80.91	(10,120.00)	-	0.00	0.00
	<a href="#">SUPPLIES</a>	923.00	39.16	39.16	0.00	883.84	4.24%	0.00	0.00
	<a href="#">TRAVEL</a>	0.00	0.00	0.00	0.00	0.00	-	0.00	0.00
	<a href="#">TRAVEL-DOMESTIC</a>	42,385.00	31,389.84	31,389.84	0.00	10,995.16	74.06%	0.00	0.00
	<b>Total</b>	<b>50,000.00</b>	<b>49,118.09</b>	<b>49,118.09</b>	<b>80.91</b>	<b>801.00</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>
Indirect Cost	<a href="#">INDIRECT COSTS</a>	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
	<b>Total</b>	<b>29,250.00</b>	<b>28,734.11</b>	<b>28,734.11</b>	<b>47.33</b>	<b>468.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>
<b>Total</b>		<b>79,250.00</b>	<b>77,852.20</b>	<b>77,852.20</b>	<b>128.24</b>	<b>1,269.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>

Use Standard Colors  
 Use ADA Compliant Colors

Release 3

# When using the dropdown calendar, you can type the year or click the arrows. Click on a month and day. Note: reports default to the award's max date range.

- Budget, Actual, Encumbrance - Drill Through

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---

P-T-A: 10047-1-EENS00020N ⓘ ⓘ

Award Short Name Sample Award 20  
Award Status ACTIVE  
PI Name Doe, John

Award Start Date 07/01/2011  
Award End Date 12/31/2014  
Award Close Date 03/31/2015

Funding Source Funding Source 20  
Banner Index 164109  
Period Date Range From Sep 30, 2011 to Jul 31, 2014

[Expand Expenditure Type +](#)

		Budget Amount	Period Actual *	Cumulative Actual *	Cumulative Encumbrance	Balance (Deficit)	Spending Level	In Funds Failed	In Suspense Account/s
Direct Cost	COMPENSATION	2,240.00	0.00	0.00	0.00	2,240.00	0.00%	0.00	0.00
	FRINGE BENEFITS EXPENSE	132.00	0.00	0.00	0.00	132.00	0.00%	0.00	0.00
	OCCUPANCY RENTAL	4,320.00	7,650.00	7,650.00	0.00	(3,330.00)	177.08%	0.00	0.00
	PUBLICATIONS AND DUES	0.00	10,039.09	10,039.09	80.91	(10,120.00)	-	0.00	0.00
	SUPPLIES	923.00	39.16	39.16	0.00	883.84	4.24%	0.00	0.00
	TRAVEL	0.00	0.00	0.00	0.00	0.00	-	0.00	0.00
	TRAVEL-DOMESTIC	42,385.00	31,389.84	31,389.84	0.00	10,995.16	74.06%	0.00	0.00
<b>Total</b>	<b>50,000.00</b>	<b>49,118.09</b>	<b>49,118.09</b>	<b>80.91</b>	<b>801.00</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>	
Indirect Cost	INDIRECT COSTS	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
	<b>Total</b>	<b>29,250.00</b>	<b>28,734.11</b>	<b>28,734.11</b>	<b>47.33</b>	<b>468.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>
<b>Total</b>	<b>79,250.00</b>	<b>77,852.20</b>	<b>77,852.20</b>	<b>128.24</b>	<b>1,269.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>	

Period Date Range (required):

From: Sep 30, 2011

To: 2011

Re: Aug Sep Oct Nov Dec

Sun Mon Tue Wed Thu Fri Sat

1 2 3

\* Excl: 4 5 6 7 8 9 10

Spend: 11 12 13 14 15 16 17

90-91

Over: 18 19 20 21 22 23 24

25 26 27 28 29 30

ⓘ Award Mapping and Info

Use Standard Colors  
 Use ADA Compliant Colors

Release 3

# After choosing required criteria, click on links and icons in the header to open more reports.

Click to view Award personnel and more info on the award

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- Budget, Actual, Encumbrance - Drill Through

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P-T-A: 10047-1-EENS00020N

Award Short Name Sample Award 20  
Award Status ACTIVE  
PI Name Doe, John

Award Start Date 07/01/2011  
Award End Date 12/31/2014  
Award Close Date 03/31/2015

Funding Source Funding Source 20  
Banner Index 164109  
Period Date Range From Sep 30, 2011 to Jul 31, 2014

Period Date Range (required):

From: Sep 30, 2011

To: Jul 31, 2014

Refresh

Expand Expenditure Type +

	Budget Amount	Period Actual *	Cumulative Actual *	Cumulative Encumbrance	Balance (Deficit)	Spending Level	In Funds Failed	In Suspend Account/s
Direct Cost								
COMPENSATION	2,240.00	0.00	0.00	0.00	2,240.00	0.00%	0.00	0.00
FRINGE BENEFITS EXPENSE	132.00	0.00	0.00	0.00	132.00	0.00%	0.00	0.00
OCCUPANCY RENTAL	4,320.00	7,650.00	7,650.00	0.00	(3,330.00)	177.08%	0.00	0.00
PUBLICATIONS AND DUES	0.00	10,039.09	10,039.09	80.91	(10,120.00)	-	0.00	0.00
SUPPLIES	923.00	39.16	39.16	0.00	883.84	4.24%	0.00	0.00
TRAVEL	0.00	0.00	0.00	0.00	0.00	-	0.00	0.00
TRAVEL-DOMESTIC	42,385.00	31,389.84	31,389.84	0.00	10,995.16	74.06%	0.00	0.00
Total	50,000.00	49,118.09	49,118.09	80.91	801.00	98.40%	0.00	0.00
Indirect Cost								
INDIRECT COSTS	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
Total	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
Total	79,250.00	77,852.20	77,852.20	128.24	1,269.56	98.40%	0.00	0.00

\* Excludes expenses in Funds Failed

Spending Level Criteria

90-99.99% Spent

Over 100% Spent

Award Personnel

Award Mapping and Info

Use Standard Colors

Use ADA Compliant Colors

Release 3

Click to expand Expenditure Type

Click to view Expense Details

Click to view Encumbrances

Click to view Failed funds

Click to view expenditures in Suspend

# For longer reports, you may view other pages by clicking on links in the lower left area of the screen.

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WASHINGTON, DC

**DATA WAREHOUSE**

- Actuals PTA - Drill Through

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### Actual Expenses by Project-Task-Award

Project Task Award: 10048-1-CCL500009F

Award Short Name: Sample Award 9

Award Status: ACTIVE

PI Name: Doe, John

Award Start Date: 05/01/2012

Award End Date: 04/30/2014

Award Close Date: 07/19/2014

Funding Source: Funding Source 9

Banner Index: 164114

Period Date Range: From May 31, 2012 to Mar 31, 2014

Task Description: Task 1

Period Date Range (required):

From: May 31, 2012

To: Mar 31, 2014

Expenditure Category (optional):

- COMPENSATION
- FRINGE BENEFITS EXPENSE
- INDIRECT COSTS
- MAINTENANCE
- NON-CAPITALIZED FURNITURE & EQ
- OCCUPANCY RENTAL
- PRINTING
- PUBLICATIONS AND DUES
- STUDENT SUPPORT
- SUPPLIES

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

Refresh

! Award Personnel

! Award Mapping and Info

[Top](#) |
 [Page up](#) |
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**Note – Report shown above is the expense detail report**



# Detail report totals can be seen at the bottom of the last page of your report.

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**P-T-A: 10047-1-EENS00020N** ↑ ⓘ

Award Short Name: Sample Award 20  
Award Status: ACTIVE  
PI Name: Doe, John

Award Start Date: 07/01/2011  
Award End Date: 12/31/2014  
Award Close Date: 03/31/2015

Funding Source: Funding Source 20  
Banner Index: 164109  
Period Date Range: From Sep 30, 2011 to Jul 31, 2014

**Period Date Range (required):**

From:

To:

[Expand Expenditure Type +](#)

	Budget Amount	Period Actual *	Cumulative Actual *	Cumulative Encumbrance	Balance (Deficit)	Spending Level	In Funds Failed	In Suspense Account/s
Direct Cost								
<a href="#">COMPENSATION</a>	2,240.00	0.00	0.00	0.00	2,240.00	0.00%	0.00	0.00
<a href="#">FRINGE BENEFITS EXPENSE</a>	132.00	0.00	0.00	0.00	132.00	0.00%	0.00	0.00
<a href="#">OCCUPANCY RENTAL</a>	4,320.00	7,650.00	7,650.00	0.00	(3,330.00)	177.08%	0.00	0.00
<a href="#">PUBLICATIONS AND DUES</a>	0.00	10,039.09	10,039.09	80.91	(10,120.00)	-	0.00	0.00
<a href="#">SUPPLIES</a>	923.00	39.16	39.16	0.00	883.84	4.24%	0.00	0.00
<a href="#">TRAVEL</a>	0.00	0.00	0.00	0.00	0.00	-	0.00	0.00
<a href="#">TRAVEL-DOMESTIC</a>	42,385.00	31,389.84	31,389.84	0.00	10,995.16	74.06%	0.00	0.00
<b>Total</b>	<b>50,000.00</b>	<b>49,118.09</b>	<b>49,118.09</b>	<b>80.91</b>	<b>801.00</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>
Indirect Cost								
<a href="#">INDIRECT COSTS</a>	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
<b>Total</b>	<b>29,250.00</b>	<b>28,734.11</b>	<b>28,734.11</b>	<b>47.33</b>	<b>468.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>
<b>Total</b>	<b>79,250.00</b>	<b>77,852.20</b>	<b>77,852.20</b>	<b>128.24</b>	<b>1,269.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>

**\* Excludes expenses in Funds Failed**

Spending Level Criteria

90-99.99% Spent

Over 100% Spent

↑ Award Personnel

ⓘ Award Mapping and Info

Use Standard Colors

Use ADA Compliant Colors

Release 3

# Any report's data can be exported for off-line use.

## Click the export icon in the upper right to choose a file type. For Excel, the 2007 format is recommended.

THE GEORGE WASHINGTON UNIVERSITY WASHINGTON, DC DATA WAREHOUSE

- Budget, Actual, Encumbrance - Drill Through

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View in PDF Format  
View in XML Format  
View in Excel Options

P-T-A: 10047-1-EENS00020N

Period Date Range: From Sep

Award Short Name: Sample Award 20  
Award Status: ACTIVE  
PI Name: Doe, John

Award Start Date: 07/01/2011  
Award End Date: 12/31/2014  
Award Close Date: 03/31/2015

Funding Source: Funding Source 20  
Banner Index: 164109  
Period Date Range: From Sep 30, 2011 to Jul 31, 2014

Expand Expenditure Type +

	Budget Amount	Period Actual *	Cumulative Actual *	Cumulative Encumbrance	Balance (Deficit)	Spending Level	In Funds Failed	In Suspend Account/s
Direct Cost								
COMPENSATION	2,240.00	0.00	0.00	0.00	2,240.00	0.00%	0.00	0.00
FRINGE BENEFITS EXPENSE	132.00	0.00	0.00	0.00	132.00	0.00%	0.00	0.00
OCCUPANCY RENTAL	4,320.00	7,650.00	7,650.00	0.00	(3,330.00)	177.08%	0.00	0.00
PUBLICATIONS AND DUES	0.00	10,039.09	10,039.09	80.91	(10,120.00)	-	0.00	0.00
SUPPLIES	923.00	39.16	39.16	0.00	883.84	4.24%	0.00	0.00
TRAVEL	0.00	0.00	0.00	0.00	0.00	-	0.00	0.00
TRAVEL-DOMESTIC	42,385.00	31,389.84	31,389.84	0.00	10,995.16	74.06%	0.00	0.00
Total	50,000.00	49,118.09	49,118.09	80.91	801.00	98.40%	0.00	0.00
Indirect Cost								
INDIRECT COSTS	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
Total	29,250.00	28,734.11	28,734.11	47.33	468.56	98.40%	0.00	0.00
<b>Total</b>	<b>79,250.00</b>	<b>77,852.20</b>	<b>77,852.20</b>	<b>128.24</b>	<b>1,269.56</b>	<b>98.40%</b>	<b>0.00</b>	<b>0.00</b>

\* Excludes expenses in Funds Failed

Spending Level Criteria

- 90-99.99% Spent
- Over 100% Spent

Award Personnel  
Award Mapping and Info

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Use ADA Compliant Colors

Release 3

# After choosing your file type, a window will pop-up asking you to Open or Save the data export.

The screenshot displays a web application interface for 'THE GEORGE WASHINGTON UNIVERSITY DATA WAREHOUSE'. The header includes the university logo and navigation links like 'Log On' and 'About'. Below the header, a notification bubble with an information icon states: 'Your report is ready and will download to your Web browser in a few moments.' To the right of this notification are several icons and links, including 'Keep this version', 'Add this report', and a printer icon.

Overlaid on the page is a 'Windows Internet Explorer' dialog box. The dialog asks: 'What do you want to do with Budget, Actual, Encumbrance - Drill Through.xlsx?'. It specifies the file type as 'Microsoft Excel 12' and the source as 'dev.gsource.gwu.edu'. The dialog offers three options: 'Open' (with a note 'The file won't be saved automatically.'), 'Save', and 'Save as'. A 'Cancel' button is located at the bottom right of the dialog.

The exported file has a similar layout as the online tool. Save this file to use offline. Don't forget to run and export the report in the future for new data.

cognos [Read-Only] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Acrobat

Normal Page Layout Page Break Preview Custom Views Full Screen

Workbook Views

Ruler Formula Bar Gridlines Headings

Zoom 100% Zoom to Selection

New Window Arrange All Freeze Panes Unhide

View Side by Side Synchronous Scrolling Reset Window Position

Save Workspace Switch Windows

Macros

R4

**Award Summary**

Project Number	Award Number	Task	Award Short Name	Spending Level	PI Name	Award Start Date	Award End Date	Award Status	Funding Source Desc	Award Type	Budget Amount	Actual Amount	Encumbrance Amount	Balance (Deficit)	PI Full Name (optional):
10022	CCLS00031E	Multiple	Sample Award 31	99.99%	Doe, John	10/01/2005	04/01/2013	ON_HOLD	Funding Source 31	Grant	21,856,653.71	21,853,834.83	0.00	2,758.88	Award Status (optional):
10023	CCNS00035A	1	Sample Award 35	98.74%	Doe, John	10/01/2005	09/30/2012	ACTIVE	Funding Source 35	Contract	1,385,000.00	1,367,534.76	0.00	17,465.24	
10023	EENS00038N	1	Sample Award 8	41.54%	Doe, John	07/01/2011	12/31/2014	ACTIVE	Funding Source 8	Contract	52,500.00	21,810.11	0.00	30,689.89	
10040	CCNS00007N	2	Sample Award 7	24.99%	Doe, John	07/01/2011	12/31/2014	ACTIVE	Funding Source 7	Contract	15,000.00	3,748.86	0.00	11,251.14	Spending Level for Open Awards
10040	EENS00006N	4	Sample Award 6	103.08%	Doe, John	08/01/2012	07/31/2013	ACTIVE	Funding Source 6	Contract	100,000.00	103,083.19	0.00	(3,083.19)	90-99.99% Spent
10043	EENS00003E	1	Sample Award 3	93.45%	Doe, John	11/01/2012	10/31/2013	ACTIVE	Funding Source 3	Grant	20,600.00	19,251.26	0.00	1,348.74	Over 100% Spent
10044	EENS00004E	1	Sample Award 4	83.01%	Doe, John	02/15/2013	09/30/2013	ACTIVE	Funding Source 4	Contract	17,500.00	14,527.03	0.00	2,972.97	
10045	EENS00002N	1	Sample Award 2	18.19%	Doe, John	05/06/2013	06/13/2014	ACTIVE	Funding Source 2	Contract	81,500.00	14,828.72	0.00	66,671.28	Award Personnel
10046	EENS00001E	1	Sample Award 1		Doe, John	05/14/2013	08/12/2013	AT_RISK	Funding Source 1	Contract	0.00	5,130.08	0.00	(5,130.08)	Award Mapping and Info

Report run on: Sep 24, 2013 2:30:57 PM

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Ready

8 Tuesday, September 24, 2013

# Log off from the Reports tool in the upper right area when you are finished or have exported data.

THE GEORGE WASHINGTON UNIVERSITY DATA WAREHOUSE WASHINGTON, DC

- P/T/A Budget, Encumbrance and Actuals

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< Return to Prompt Page **Award Summary**

Project Number	Award Number	Task	Award Short Name	Spending Level	PI Name	Award Start Date	Award End Date	Award Status	Funding Source Desc	Award Type	Budget Amount	Actual Amount	Encumbrance Amount	Balance (Deficit)
<a href="#">10022</a>	<a href="#">CCLS00031F</a>	Multiple	Sample Award 31	99.99%	Doe, John	10/01/2005	04/01/2013	ON_HOLD	Funding Source 31	Grant	21,856,653.71	21,853,894.83	0.00	2,758.88
<a href="#">10023</a>	<a href="#">CCNS00035A</a>	1	Sample Award 35	98.74%	Doe, John	10/01/2005	09/30/2012	ACTIVE	Funding Source 35	Contract	1,385,000.00	1,367,534.76	0.00	17,465.24
<a href="#">10040</a>	<a href="#">EENS00002N</a>	1	Sample Award 8	41.54%	Doe, John	07/01/2011	12/31/2014	ACTIVE	Funding Source 8	Contract	52,500.00	21,810.11	0.00	30,689.89
	<a href="#">CCNS00007N</a>	2	Sample Award 7	24.99%	Doe, John	07/01/2011	12/31/2014	ACTIVE	Funding Source 7	Contract	15,000.00	3,748.86	0.00	11,251.14
<a href="#">10043</a>	<a href="#">EENS00006N</a>	4	Sample Award 6	103.08%	Doe, John	08/01/2012	07/31/2013	ACTIVE	Funding Source 6	Contract	100,000.00	103,083.19	0.00	(3,083.19)
	<a href="#">EENS00003F</a>	1	Sample Award 3	93.45%	Doe, John	11/01/2012	10/31/2013	ACTIVE	Funding Source 3	Grant	20,600.00	19,251.26	0.00	1,348.74
<a href="#">10044</a>	<a href="#">EENS00004F</a>	1	Sample Award 4	83.01%	Doe, John	02/15/2013	09/30/2013	ACTIVE	Funding Source 4	Contract	17,500.00	14,527.03	0.00	2,972.97
<a href="#">10045</a>	<a href="#">EENS00002N</a>	1	Sample Award 2	18.19%	Doe, John	05/06/2013	06/13/2014	ACTIVE	Funding Source 2	Contract	81,500.00	14,828.72	0.00	66,671.28
<a href="#">10046</a>	<a href="#">EENS00001F</a>	1	Sample Award 1		Doe, John	05/14/2013	08/12/2013	AT_RISK	Funding Source 1	Contract	0.00	5,130.08	0.00	(5,130.08)

PI Full Name (optional):  
 Doe, John  
[Select all](#) [Deselect all](#)

Award Status (optional):  
 ACTIVE  
 AT\_RISK  
 CLOSED  
 ON\_HOLD  
[Select all](#) [Deselect all](#)

Refresh

Spending Level for Open Awards  
 90-99.99% Spent  
 Over 100% Spent  
 ⓘ Award Personnel  
 ⓘ Award Mapping and Info

## Please visit online resources for additional help.

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- Training materials:

<https://sponsoredprojects.gwu.edu/pi-dashboard-training-materials>

- FAQs:

<https://sponsoredprojects.gwu.edu/pi-dashboard-faqs>

- Data Dictionary:

<https://sponsoredprojects.gwu.edu/pi-dashboard-data-dictionary>