

For Research Administrators: Working with the PI Dashboard

Working with the Updated PI Dashboard

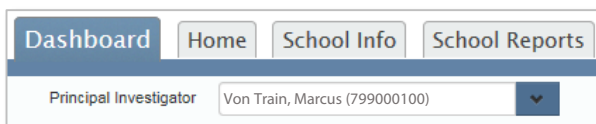
The PI Dashboard in InfoPorte has been updated based on feedback received from principal investigators across campus that they don't have easy access to financial information about their grants. The Dashboard provides a "snapshot" of grant funding and expenses, including salary projections, at both the award level and the project level. The information in the PI Dashboard is pulled directly from ConnectCarolina and is an accurate reflection of that information.

As a research administrator, you probably have more in depth knowledge about the expenses for a project. It may be helpful for you to look at the PI Dashboard at the beginning of each month to be sure the transactions that are posting to a project are correct.

Getting Access to the PI Dashboard

As a research administrator, you can get access to the PI Dashboard to see the same information as the principal investigator you support. To get access, you need to work with your InfoPorte Administrator who can grant access.

When you have access, you see a dropdown box where you can choose the principal investigator to see the same information that he or she does.



Where Does the Information Pull From?

Are you using data from the GL Actuals ledger or the Commitment Control ledgers?

Although the information on the PI Dashboard is accurate, it may not match other reports in InfoPorte. Other reports in InfoPorte, such as the ledger rollup reports, pull information only from the Commitment Control ledgers. The PI Dashboard pulls information from both the GL Actuals and the Commitment Control ledgers. If you're seeing numbers that don't match, there may be outstanding transactions that haven't yet posted to the GL Actuals ledger. For more information on the different ledgers, go to the [Finance Reports 1: Understanding Ledgers](#) computer based training.

Why Does the Budget Not Match?

Are you including indirect costs in your project budget?

One of the main uses for the PI Dashboard is for principal investigators to see the available balances on their grants. Most grants have indirect costs that reduce the funds available to spend. The direct budget on PI Dashboard does not include those indirect costs. The project budget on the Grant Profile tab does include the indirect costs in the project budget. When comparing reports, be sure that you subtract the indirect costs from the budget shown in the Grant Profile reports to match the direct budget on the PI Dashboard.

Checklist for Research Administrators

As a research administrator, you can use this list below as a resource to make sure that the information in ConnectCarolina is correct. This ensures that the information on the PI Dashboard, and other InfoPorte reports is correct.

If you notice changes that need to be made to...	You need to...	You can find more information...
The budget for a project (Direct Budget)	<ul style="list-style-type: none"> • Check the budget for a project using the Budget Overview in ConnectCarolina • Contact the Office of Sponsored Research to make a change 	Contract & Grants computer based training : Running a Project Budget Overview Inquiry
The soft encumbrances purchase requisitions or purchase orders (Pre-Enc/Encumbrances)	<ul style="list-style-type: none"> • Create a change order for your purchase requisition or purchase order • Relieve the soft encumbrance in InfoPorte 	For soft encumbrances: Financial Reporting with InfoPorte guide on ccinfo.unc.edu
The expenses, other than salaries (Direct Expense)	<ul style="list-style-type: none"> • Verify the amount of transactions and see if they've posted, using the Transactions tab in InfoPorte • Make an adjustment to the chartfield string for a transaction, other than payroll, using a Correcting Journal Entry 	<ul style="list-style-type: none"> • InfoPorte Reporting computer based training: <ul style="list-style-type: none"> • Finance Reports 3: Finding Transactions – Part 1 • Finance Reports 4: Finding Transactions – Part 2 • Reconciling Transactions • Campus Journal Entries: Correcting JE Enhancements webinar
The salaries and fringe benefits (Direct Expense)	<ul style="list-style-type: none"> • Make an adjustment to the chartfield string for a payroll transaction using the Payroll Accounting Adjustment Tool (PAAT) for past transactions • Make an adjustment to future salary transactions using a funding swap ePAR 	<ul style="list-style-type: none"> • Payroll Accounting Adjustment Tool computer based training: Adjusting Funding Sources for Past Pay Periods Using PAAT • Contact your school or division's HR Representative to make the appropriate funding swap
The salary projections (Payroll Projections)	<p>Make changes to salary projections because of a change to the</p> <ul style="list-style-type: none"> • job end date using an ePAR • Budget end date by contacting the Office of Sponsored Research • Funding end date using a funding swap ePAR 	<p>From your Office of Sponsored Research contact, your HR Representative, or HR Basic Originators computer based training:</p> <ul style="list-style-type: none"> • Basic Originators 1: Understanding Employee Funding • Basic Originators 2: Entering a Funding Swap