Principal Investigator Dashboard & Research Project Statement FAQ

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How do I run the Research Project Statement for one of my projects?

1. Navigate to the Research Project Statement Dashboard by clicking the Dashboards dropdown menu in the top-right corner of the screen and selecting 'Research Project Statement' under the 'Custom' sub-heading.
2. Use the Project Number drop-down list to select the desired project number. For Principal Investigators, this list will be filtered to include only your own projects.

3. For Administrators, Accountants, or other users, the Project Number list can be filtered by using the Principal Investigator drop-down list.
4. Users may also type in a project number to the Project Number drop-down menu instead of selecting a number from the list. If the project number typed in does not match the Principal Investigator listed, the Research Project Statement will still run.
5. Once the desired project number has been selected, use the Period Start Date and Period End Date drop-down menus to define the time-period for which to run the Research Project Statement.
6. After each selection the Research Project Statement will automatically update. Once the Project Number, Period Start Date and Period End Date have been selected, you can view the Research Project Statement below.

Which filters to a need to select before I run a report?

1. All filters are assigned default values, or default to displaying all values for that field. For example, if no selection is made for the Principal Investigator filter, data for all PIs will be displayed.
2. Users do not need to make selections for all filters before the report will run. Users can select only the filters they want to apply and leave the other filters blank (or with their default values).

3. Please note that in cases when a user has access to all projects and departments, it is recommended to set-up default selections and to avoid running reports with no filters. Running reports with no filters may affect performance as a large amount of data needs to be retrieved.

How can I set-up a default Department on the Principal Investigator Dashboard? (steps apply to setting up defaults on all dashboard pages)

1. Navigate to the Principal Investigator Dashboard.
2. Click the Research Accounting Summary tab.
3. Use the filters at the top of the page to select the appropriate Project Department or Project Department ID.
4. If your Department is not listed in the drop-down menu, click 'Search' at the bottom of the drop-down menu to open the Search dialog box.
5. Once you have selected your Department, click Apply.
6. Click the Page Settings wheel in the top right corner of the screen.
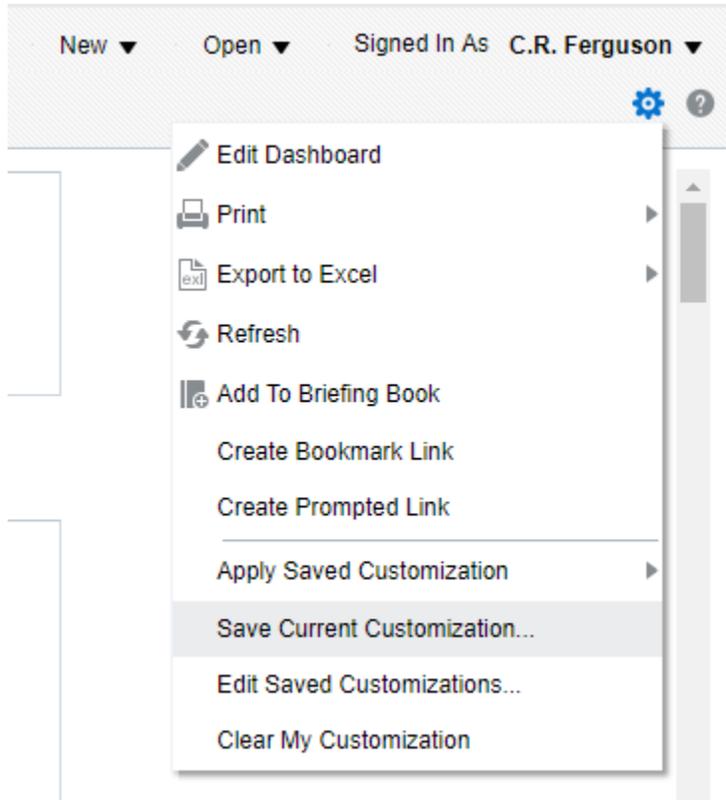
7. Select Save Current Customization... from the Page Settings menu to open the Save Current Customization dialog box.
8. Give your current settings/customization a descriptive name so that you can reference it later.
9. Click on 'Make this my default for this page' then hit OK.
10. Refresh the page to verify that the default settings for this page have been changed.
11. The default settings for the Research Accounting Summary page will automatically be applied to the other pages of the Principal Investigator Dashboard. If you want other pages to have different default values, you can navigate to each page and set a separate default by following the same steps.

How do I export my Research Project Statement to Excel?

1. Navigate to the Research Project Statement Dashboard.
2. Use the filters at the top of the page to select the Project Number, Period Start Date and Period End Date with which to run the Research Project Statement.
3. Click the Page Settings wheel in the top right corner of the screen.
4. Select Export to Excel from the Page Settings menu.
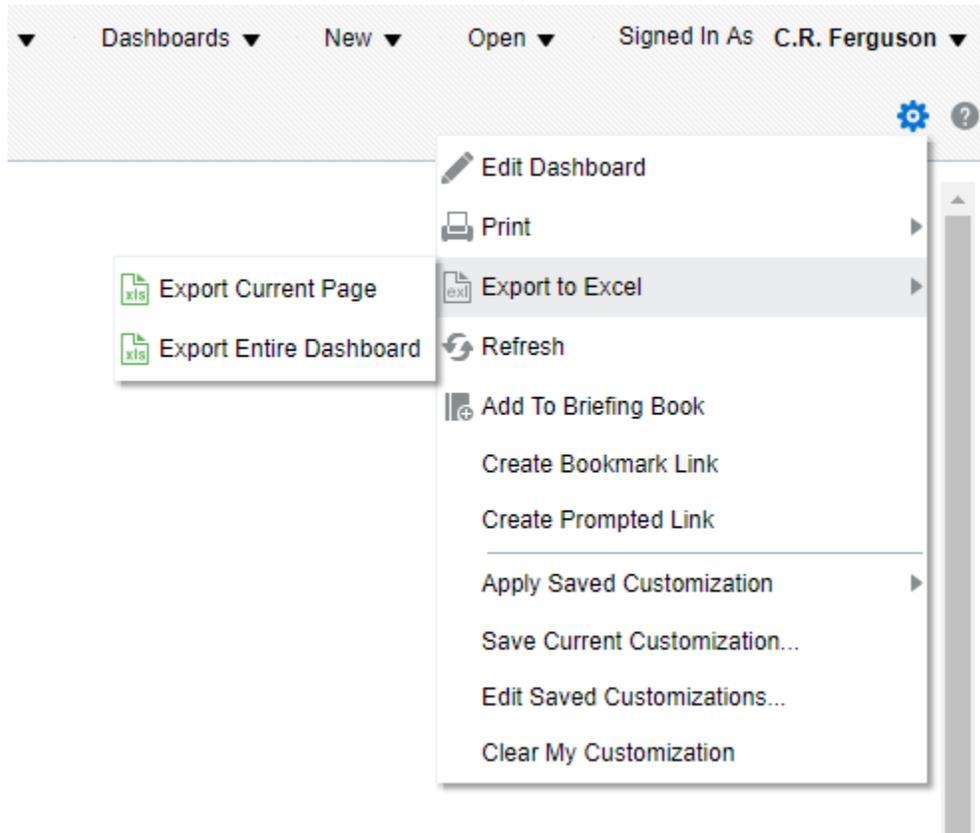
5. If you want to export only the Research Project Statement summary tab (i.e. no Current Period Transactions, etc.), select Export Current Page.
6. If you want to also export the Current Period Transaction, Commitments, etc. as separate tabs on an Excel sheet, select Export Entire Dashboard.

How can I view all payments (across multiple projects) to a single employee?

1. Navigate to the Principal Investigator Dashboard.
2. Click the Labour Distribution tab.
3. Use the Employee Full Name filter to select the desired employee. If the employee's name is not listed, click the Search button at the bottom of the drop-down menu to open the Search dialog box.
4. Once you have selected the desired Employee Full Name, clear any other selections you have made (Project Department, Principal Investigator, Sponsor Name, etc). Clearing these selections will ensure that all payments to the employee are captured in the report.
5. Please note that not all users have been granted access to the Labour Distribution for all projects (even if they have access to research accounting details for the project).

How can I view Funding & Expenditures by Sponsor for my Department?

1. There are multiple ways to view Funding and Expenditures by Sponsor using the BI Dashboards. In this example, start by navigating to the Principal Investigator Dashboard.
2. Click the Research Accounting Summary tab.
3. Use the Project Department or Project Department ID to select the desired Department.
4. Once you have selected your Department, click Apply.
5. The resulting table breaks down research project balances by PI, Sponsor and Project. We will alter the table to show results by Sponsor first.
6. Hover your mouse over one of the PI Name that appears above each table. Right click on this name.
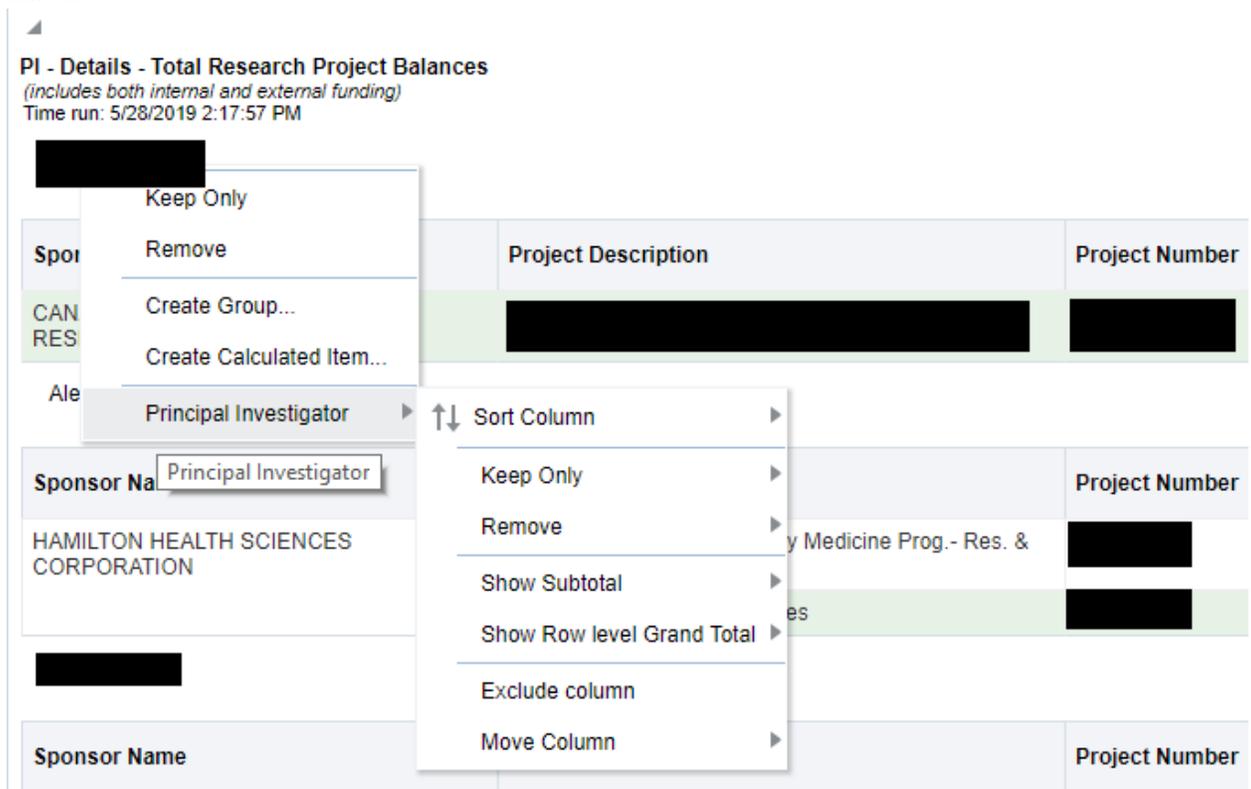
7. The menu that appears when you right click includes several options. Click on Principal Investigator to bring up a sub-menu.
8. The last option on this sub-menu is Move Column. Click Move Column and select 'To Columns'. Clicking this option will include Principal Investigator as a column in the table.
9. Next, click the Principal Investigator column header and drag it to the right, past the Sponsor Name column.
10. Finally, right click the Sponsor Name column header. Click on 'Show Subtotal' and select 'After values'
11. The table will now display the total Funding, Transfers and Expenditures by Sponsor for all projects in the selected Department.

How can I filter the Research Accounting Summary for a specific time period?

1. The Research Accounting Summary page is designed to give a quick, simple overview of each Principal Investigator's research projects. For more detailed information, including filters for specific dates, use the All Project Balances page instead.
2. Navigate to the Principal Investigator Dashboard.
3. Click the All Project Balances tab.
4. This report allows users to choose a Period Start Date and a Period End date. The summary table includes an additional field for the Cash Balance as of the Period Start Date.

Are Current Period balances inclusive of the Period Start Date and Period End Date?

1. Yes. On all reports where a Period Start Date and Period End Date are selected, the selected dates fall within the Current Period.

Can I use the Award Amount column to calculate my Cash Balance instead of the Funding & Transfers?

1. In many cases the Award Amount can be used to calculate a project's available cash balance instead of the Funding and Transfers fields. However, users should be aware of several limitations of the Award Amount field when using it to calculate a project's remaining cash balance:
   - The Award Amount field does not specify the currency of the funding. In some cases this may result in differences between the Award Amount and the actual funding received.
   - The Award Amount field is not updated if there is a change to amount of funding to be received. If an award increases or decreases in value after the project is set-up, the change is not reflected in the Award Amount field.
   - In some cases, when funding was renewed for a project, that project retained the same Project Number. In these cases, the Award Amount was not updated, and therefore does not reflect the additional funding to be received as a result of the renewal, although that funding will appear under the Funding or Transfers fields. Going forward, when projects are renewed they are assigned a new project number and the Award Amount field is updated.
   - In some cases in which projects sub-grant funding to another project, the Award Amount excludes the amount to be sub-granted. In other cases, the Award Amount includes the amount to be sub-granted. In these cases please verify whether the Award Amount includes or excludes the amount to be sub-granted.

Can I export the data I see in BI to Excel?

1. Yes, any table viewed in BI can be exported to Excel or to other formats.
2. At the bottom of each report you will find a link that says 'Export'.
3. Clicking the Export link will open up a menu to select the desired format.
4. If Excel is selected as the format, some formatting will be retained from the table as displayed in BI. For example, if two cells are merged in BI, they will still be merged when the table is exported to Excel.
5. If you want to export only the data without any formatting, once you click the Export link at the bottom of the page, select Data and then CSV. Doing so will generate a CSV file that can be viewed in Excel of the data displayed in BI without any of the formatting.

Do the Labour Distribution reports on the Principal Investigator Dashboard include journal entries that have been made to move salary from one project to another?

1. No, the Labour Distribution reports on the Principal Investigator Dashboard shows only what was originally paid to employees.
2. Any journal entries made to an account after an employee has been paid will not be reflected in the Labour Distribution report.
3. To see the Labour Distribution alongside all journal entries made to salary accounts, use the Labour Distribution & Salary Journal Entries tab on the Research Project Statement dashboard.
4. This report shows the Labour Distribution for the selected project and time period as well as all the journal entries that have been made to the salary accounts for that project.
5. Users can then use the Long Description for each journal entry and the Journal ID to track how money was moved between projects for each employee.

Why am I limited to selecting only the start of the month or the end of the month for the time period? Is there in BI I can view reports using specific dates?

1. Unlike the Research Project Statement, on most BI reports users are limited to selecting only the start of the month and the end of the month to define the time period for which to view the report.
2. The decision was made to limit BI reports to full months in order to accurately reconcile GL transactions to the Labour Distribution. When a pay end date falls close to the start of the month, those transactions are included under the previous month in the GL and assigned an accounting date of the last day of the previous month. As a result, it is not possible in all cases to reconcile transactions from the GL to the Labour Distribution on a day-by-day basis, but it is possible to do so for a full month.
3. Limiting users to full months also ensures that all commitments are captured. In some cases, commitments are assigned an accounting date of the last day of the current month. In these cases, running a partial month can cause these commitments to be excluded. By forcing users to select a complete month it ensures all commitments are captured in the report.
4. It is possible to run a report using specific dates using the All Transactions Details page on the Research Project Statement. This report allows users to look up transactions by filtering for a specific date range.