

## Snapshot of PI Dashboard

The screenshot shows the Principal Investigator Dashboard with the following components and annotations:

- 1** Award: A17-0113
- 2** Total Award Amount: 249,380.00
- 3** Project: 5104820
- 4** Filter: A text input field for filtering projects.
- 5** Direct Budget: 57,547.00
- 6** Direct Expense: 32,918.58
- 7** Pre-Enc/Encumbrance: 0.00
- 8** Payroll Projection: 2,767.99
- 9** Adjusted Direct Expense: 35,686.57
- 10** Direct Balance: 21,860.43
- 11** Monthly Detail: A table showing employee information for Von Train, Marcus.
- 12** Program/CC: A table showing program and cost codes.

Annotations include:

- "Type any of the project information displayed to only show selected projects." (pointing to the Filter field)
- "Hover over the Award link to see the award title." (pointing to the Award column)
- "Click the arrow to see more results." (pointing to the Show 10 entries dropdown)
- "You can click any of the X icons to download the results from that section to Excel." (pointing to the Excel icon)

Award	Total Award Amount	Project	PI Name	Project Description	Project Status	Sponsor ID - Name	Project Begin Date	Project End Date	Direct Budget	Direct Expense	Pre-Enc/Encumbrance	Payroll Projection	Adjusted Direct Expense	Direct Balance
A17-0113	249,380.00	5104820	Von Train, Marcus	Preparation of Inclusion Facil	Open	5500 - US Department of Education (DOED)	4/1/2016	6/30/2017	57,547.00	32,918.58	0.00	2,767.99	35,686.57	21,860.43

Employee	Project	Project Description	Annualized Salary	Annualized Fringe	% Total	End Date
Von Train, Marcus	5104820	Preparation of Inclusion Facil	10,943.93	2,994.12	10.0%	6/30/2017

- 1 Award** shows the UNC-assigned number for a sponsored research award. Click the award number to see detailed information.
- 2 Total Award Amount** shows the total funding for all projects under an award.
- 3 Project** shows the UNC-assigned number that tracks budget and expenses for a research project. Click the project number to see detailed information.
- 4 Sponsor ID – Name** shows the sponsor-assigned award number on the award line and the sponsor’s name on the project lines.
- 5 Direct Budget** shows the total amount budgeted to be spent. *Indirect costs (that is, expenses that are charged to a project but that benefit more than one project, such as building maintenance), are not included in this budget since the indirect costs are not available to be spent.*
- 6 Direct Expense** shows the total amount of spending applied to the project.
- 7 Pre-Enc/Encumbrance** shows the total amount of soft encumbrances, purchase requisitions, and purchase orders that are outstanding.
- 8 Payroll Projection** shows the expected salary for employees paid from the project. Salary projections are not available for temporary employees.
- 9 Adjusted Direct Expense** shows the total of the direct expenses, soft encumbrances, purchase requisitions, purchase orders, and projected salaries for the project ID.
- 10 Direct Balance** shows the remaining direct balance on a project ID after subtracting pre-encumbrances, encumbrances, direct expenses and payroll projections.
- 11 Monthly Detail** shows the employees who are paid from your projects.
- 12 Program/CC** shows the programs and cost codes that the department has set up that for tracking spending.


## Seeing Details about an Award or a Project

From the dashboard, click the **Award** link or **Project** link to open the Sponsored Project Financial Report screen. This screen shows:

- 1 The total amount of an award (only shows if you click on an award number)
- 2 Budget amount for the award or project
- 3 The amount of expenses applied to the award or project
- 4 The amount of soft encumbrances, outstanding purchase requisitions and purchase orders
- 5 The amount of salaries and fringe benefits projected to be applied to the award or project
- 6 The remaining balance available on the award or project (the MTD Expenses are included in this column)
- 7 Expenses that have been posted in the current month to date
- 8 The screen shows direct costs. If you want to see the total indirect costs, click the **show non-direct** link.
- 9 The dates and amounts of funding that make up the total award amount (only shows if you click on an award number)
- 10 Details about the employees who are paid from the project (click the **monthly detail** link to see projections by month)

PI Dashboard
Project Report

### Sponsored Project Financial Report



Report Date	6/6/2017
Report Period	4/1/2016 - 6/30/2017
Award Title	Preparation of Inclusion Facilitators
Award (Ramses Project #)	A17-0113
PeopleSoft Project IDs	5104820, 5104821
Sponsor Name	US Department of Education (DOED)
Award Reference #	H325K160116
Principal Investigator	Von Train, Marcus

Report of Receipts and Expenditures 1

<b>Grant Award Amount</b>	
Award Obligations to Date	249,380.00

Expenditures

Budget Line Categories	Budget	Expense	Pre-Enc / Encumbrance	Payroll Projection	Balance Available	MTD Expense
Salaries	35,380.00	24,404.02	0.00	2,173.37	8,802.61	0.00
Fringe Benefits	9,667.00	6,648.96	0.00	594.62	2,423.52	0.00
<b>Total Personnel</b>	<b>45,047.00</b>	<b>31,052.88</b>	<b>0.00</b>	<b>2,767.99</b>	<b>11,226.13</b>	<b>0.00</b>
Consultant-Contracted Services	3,000.00	1,000.00	0.00	0.00	2,000.00	0.00
Supplies	3,000.00	0.00	0.00	0.00	3,000.00	0.00
Travel-Domestic	3,500.00	6,325.70	0.00	0.00	-2,825.70	0.00
Communications	3,000.00	0.00	0.00	0.00	3,000.00	0.00
Trainee Stipends	40,500.00	36,000.00	0.00	0.00	4,500.00	0.00
Trainee Tuition & Fees	140,729.00	0.00	0.00	0.00	140,729.00	0.00
Trainee-Other	6,000.00	0.00	0.00	0.00	6,000.00	0.00
Fellowship	0.00	139,345.37	0.00	0.00	-139,345.37	0.00
<b>Total Other</b>	<b>199,729.00</b>	<b>182,671.07</b>	<b>0.00</b>	<b>0.00</b>	<b>17,057.93</b>	<b>0.00</b>
<b>Total Direct Costs</b>	<b>244,776.00</b>	<b>213,723.95</b>	<b>0.00</b>	<b>2,767.99</b>	<b>28,284.06</b>	<b>0.00</b>

[\(show non-direct\)](#) 8

Award Obligation History 9

Date	Amount	Contract
7/8/2016	249,380.00	A17-0113-001

Personnel Detail [\(monthly detail\)](#) 10

Employee	Project	Project Description	Annualized Salary	Annualized Fringe	% Total	End Date
Von Train, Marcus	5104820	Preparation of Inclusion Facil	10,943.93	2,994.12	10.0%	6/30/2017

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