

# Summit Overview

## The Principal Investigator (PI) Dashboard



### Welcome to the PI Dashboard

As a Principal Investigator, you now have access to the Summit PI Dashboard. This dashboard provides data pertinent to your day-to-day processes.

When you access the PI Dashboard, your default view will be the **Summary** tab. This tab provides you with high-level activities related to key business drivers. You will also have access to the **Demographics** tab. This tab displays non-financial information, including Speedtype, for Fund Balance, Budget Balance, and Non-Sponsored Projects.

### How do I view Dashboard information?

The **Summary** tab provides you with high-level widgets for the following activity areas:

- **Sponsored Project Counts**
- **Sponsored Project Summary**: Displays financial information for sponsored projects.
- **Fiscal Year Fund Balance Summary**: Displays those chart-strings that carry forward the fund balance.
- **Non-Sponsored Project Summary**: Displays financial information for non-sponsored projects.

These widgets are displayed in table or graph format. You can refine the data that is displayed in these widgets by entering values in the Prompt fields at the top of the Summary tab (as shown in the screenshot below). You can select one or multiple prompt values (e.g., Through Fiscal Period, DeptID, Project PI, and Award ID).

The screenshot shows the Summit PI Dashboard Summary tab. At the top, there are tabs for 'Summary' and 'Demographics', and a 'Page Options' dropdown. Below the tabs, there are two prompts: 'The data is as of Wed, Oct 19, 2011' and 'You are using Summit PROD pointing at the OBPRD00 database.' Below the prompts is a form with four dropdown menus: 'Through Fiscal Period' (2012-04 (Oct, 2011)), 'DeptID' (L610500074 - Mechanical Engineer-), 'Project PI\*' (Lucci, Dominic), and 'Award ID\*' (All Choices). A 'Go' button is to the right of the 'Award ID\*' dropdown. Below the form is a note: '\* Apply to Sponsored Project Activity only'. To the right of the form, a red arrow points to the 'Widget' label. Below the prompts and form, there are two widgets. The left widget is 'Alerts' and the right widget is 'Sponsored Project Counts'. The 'Sponsored Project Counts' widget has a sub-section 'Sponsored Projects Expired' with a table:

End Date (Days)	Count*
Prior 91-120	1
Prior > 120	3

Below the table is a note: '\* Project Count is based on today's date' and links for 'Print' and 'Download'. To the right of the table is a 'Refresh' link. The 'Sponsored Project Counts' widget also has a sub-section 'Sponsored Projects Set to Expire' with the text 'No projects set to expire within the next 90 days for the filter criteria'.

### How do I drill into an activity?

The PI Dashboard includes summary financial data for Sponsored Projects, Fund Balance Funds, and Non-Sponsored Projects. In order to view activity for a particular project or fund, click the appropriate Project or Fund link. You will be navigated from the Summary page to the Activity page.

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Sponsored Project Summary												
Project	Sponsor	PI Name	Project End Date	Status	Direct Expenditures		All Expenditures (Direct and Indirect)					
					Project to Date Expenditure	Balance Remaining	Budget	Project to Date Expenditure	Encumbrance	Balance Remaining	% Remaining	Through Fiscal Period
S70007300000005 - Income Account for R&D Work /	VARIOUS SPONSORS	Lucci, Dominic	31-Dec-2012	A	24,502.15	10,810.84	52,628.69	30,174.69	0.00	22,454.00	42.66%	2012-04 (Oct. 2011)
S5100000015006 - RES - ASTM TESTING SERVICES	APPLIED PHYSICAL SCIENCES CORP	Lucci, Dominic	31-May-2012	A	1,150.02	1,350.94	7,250.00	1,736.52	2,300.04	3,213.44	44.32%	2012-04 (Oct. 2011)
S5190000011598 - ARRA - Effect of Manufacturing	U.S. DEPARTMENT OF ENERGY	Lucci, Dominic	30-Apr-2012	A	232,618.16	25,446.89	401,885.00	338,830.92	16,310.95	46,743.13	11.63%	2012-04 (Oct. 2011)

The Activity page provides a snapshot of the project or fund, including Project Information, Expenditure Summary, Payroll Detail, Procurement Summary, Voucher Detail by PO, and Procard Detail. Typically, the Activity page displays information for the selected month with links for additional information (e.g., payroll detail by chartfield, year to date activity, project to date activity, etc.).

Information	
Speedtype	111625
DeptID	L610500074
DeptID Description	Mechanical Engineering-PI
Fund	53102
Fund Description	Federal Grants & Contracts
Ref. Award ID	DE-EE0001374
Project Number	S 5190000011598
Project Description	ARRA - Effect of Manufacturing
Project Status	ACTIVE
Principal Investigator	Lucci, Dominic
Project Period	01-NOV-09 to 30-APR-12
Sponsor	U.S. DEPARTMENT OF ENERGY

Sponsored Activity Expenditure Summary							
Budget Level Account	Month to Date Expenditure	Year to Date Expenditure	Budget	Project to Date Expenditure	Encumbrance	Balance Remaining	%
Direct Expenses	3,109.10	85,726.54	274,376.00	232,618.16	16,310.95	25,446.89	9.27%
<b>Direct Expenses Total</b>	<b>3,109.10</b>	<b>85,726.54</b>	<b>274,376.00</b>	<b>232,618.16</b>	<b>16,310.95</b>	<b>25,446.89</b>	<b>9.27%</b>
Indirect Overhead and Other	1,585.64	31,297.98	127,509.00	106,212.76	0.00	21,296.24	16.70%
<b>Indirect Overhead and Other Total</b>	<b>1,585.64</b>	<b>31,297.98</b>	<b>127,509.00</b>	<b>106,212.76</b>	<b>0.00</b>	<b>21,296.24</b>	<b>16.70%</b>
<b>Total</b>	<b>4,694.74</b>	<b>117,024.52</b>	<b>401,885.00</b>	<b>338,830.92</b>	<b>16,310.95</b>	<b>46,743.13</b>	<b>11.63%</b>

[Print - Download](#)

[Sponsored Project Expenditure - All Accounts](#) ← **All Accounts Link**

[Sponsored Project Expenditure by Month](#)

**Payroll Detail by Employee (excludes Fringe)**

### How do I access Overhead Account information?

Overhead Account information can be found in the Fiscal Year Balance Summary widget on the **Summary** tab.

### Can I print and/or download widgets within the PI Dashboard?

Yes, each widget will include a **Print** or **Download** link at the bottom of the widget. Print options include HTML and PDF. Download options include Microsoft Excel, CSV, and PowerPoint.

[Print - Download](#)