# PI Dashboard Update – April 2024
## Summary of Changes

**Announcements**

- Added and updated content to align with current enhancements and operation of the dashboard.
- Renamed "Glossary" to "Concepts and Column Definitions" and added many new definitions.
- Updated Knowledge Articles and Videos (and links to respective items).
- Added a link to initiate a Workday Help Case.

**My Grants – Non-Money**

- Removed this tab/report since all tabs auto-populate now. Content merged into Grant Budget Summary.

**Grant Budget Summary Tab**

- Now auto-populates with all grants the user is a PI or Co-PI on (or has a security role on).
- Sort results are now displayed in ascending Grant ID order by default.
- Made Grant the first column. It will remain in view while scrolling horizontally.
- Added "Is Active" column with filterable Yes/No results. Definition of "Active" added to middle Announcement box.
- Replaced "Spend Authorizations Not Linked to an Expense Report" column with "Number of Open Spend Authorizations" column. The number is clickable if it is not zero.
- Added Co-Principal Investigator column.

**Non-Grant – Overhead, Start-up, and Balance Accounts**

- Now auto-populates with the Designations and Gifts the user holds a role on.
- Added Cost Center Manager – Call Me for Help column.
- Added "Number of Open Spend Authorizations" column. The number is clickable if it is not zero.
- Updated Financial column names to include formula key.
- Updated report to better present combined account types for increased transparency of available spendable balance.
- Now displays data for both types of designations (Cash/Budget).
- Added columns (and definitions in middle Announcement):
- Cash/Fund Balance
- Spendable Balance
- Number of Open Spend Authorizations
- Account Type

**Award Budget Position Tab**

- Renamed report header to include quick instruction on how to setup a grant.

**My People**

- Now auto-populates with workers the user supervises.

**Payroll tab**

- Now auto-populates with payroll charged to the user's Grants/Gifts/Designations.
- Sort results now display most recent pay period at the top.

**Transaction Detail Reports (pop-up when clicking financial transaction amounts on main reports)**

- Added Budget Date column as first column for clear view of when the expenditure occurred.
- Added Debit-Credit column to reduce columns and give clearer results.
- Created Payee (Merchant/Supplier/Employee/Other) column that combines data that was previously across several columns.
- Added "See PARIS for converted history" for converted lines that don't include that level of detail in Workday.
- Added "Transaction that F&A was Assessed On" and "Source Data (Operational Transaction)" columns to display the original transaction that Overhead was charged on.
- Added "HM (Header Memo)/LM (Line Memo)" column.
- Extracted the most-used elements from the prior "Worktags" column, made them separate columns, and eliminated the rest of the worktags from the report.
- Rows are shorter, which allows more to be seen on the screen without vertical scrolling.
- Fewer columns = less horizontal scroll.
- No longer need to click within Worktags column to find the most important data.
- Reduced number of Available Criteria to filter on, making it easier to find the most-used items.