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.