Principal Investigator (PI) Reports Dashboard FAQS

Q -How will the PI Report Dashboard be announced to Principal Investigators?

A-On February 7, 2019 the Provost Office will send an email to the Deans and the Academic Senior Financial Administrators to announce the Dashboard.

Q- How will Principal Investigators access Workday?

A- Faculty may access the Principal Investigator Dashboard through a link on their MyASU page. Under the Employment tab there is a section entitled Financial Tools. From here expand the Reporting menu item and click on Principal Investigator Reports.

Q-Do Principal Investigators need to request a role to access Workday?

A- All researchers that are either an Award Principal Investigator or a Lead Grant Principal Investigator are automatically assigned the Award Principal Investigator or Lead Grant Principal Investigator role when the Award or Grant is set up in Workday. These roles will be able to access the Principal Investigator dashboard.

Q-Are there instructions on how to run the reports in the Dashboard?

A-Instructions are included directly in the Dashboard

Q-Who can run the reports in the PI Dashboard?

A-All authorized users may run the reports, but The My Awards Portfolio Budget to Actual Summary and My Grants Portfolio Budget to Actual Summary reports may only be run by users with roles of Award Principal Investigator or Grant Lead Principal Investigator. These two reports will only display awards and grants assigned to the user running the report.

Q- I have one program/gift that I use for multiple Academic Employee Worktags. I manually tag transactions with the appropriate Academic Employee Worktag. The Program/Gift is not setup with a **related** worktag of Academic Employee, why does the ASU-Academic Employee Report not include this Program/Gift?

A-The ASU-Academic Employee Report will only include Programs and Gifts that are setup with a **related** Academic Employee worktag. If you are using one program/gift and manually tagging individual transactions with the Academic Employee worktag those programs and gifts will not be included in the report.

Q-I forgot to setup a **related** Academic Employee Worktag to a Program or Gift when it was setup. Can I add the related worktag afterwards?

A-If there has been no transactions posted to the Program or Gift you may request Financial Services or KED accounting to add the related worktag of Academic Employee. If there have been transactions posted to the Program or Gift you will need to set up a new Program/Gift with the related worktag and transfer the balance to the new Program/Gift. Adding the related Academic Employee Worktag to an existing Program/Gift with activity will result in the ASU-Academic Employee Report excluding the transactions that were incurred prior to adding the related Academic Employee worktag.

Q: How do I identify the correct academic employee ID when there are multiple employees with the same last name?

A: The description of the Academic Employee is the following format: Last Name – First Initial and Last four digits of the ASU employee ID (Smith – J4569).

Q- Is there a difference between the ASU-Academic Employee Report and the Academic Employee Report?

A-No, there is not a difference between the two reports. The ASU-Academic Report was created to include in the Principal Investigator Dashboard and having a copy of the report allowed us to create instructional text targeted to Principal Investigators.

Q- Is there a difference between the ASU-Budget to Actuals-Grant-Ledger Detail and the Budget to Actuals-Grant-Ledger Detail?

A- No, there is not a difference between the two reports. The ASU-Budget to Actuals-Grant-Ledger Detail was created to include in the Principal Investigator Dashboard and having a copy of the report allowed us to create instructional text targeted to Principal Investigators.

Please review the Principal Investigator Reports Dashboard video for a demonstration of the dashboard. All research administrators and staff with the role of Workday "grant manager" should view the video so that they can be prepared to support faculty who wish to use this valuable resource.