

PI Dashboard Navigation Tips

An outline of features and tools available across the PI Dashboards.

1. To see your data, **enter your name in the PTA Manager field**, and click **Apply**.

Set filters as needed.

Caltech

PTA Manager

Capra, Frank

Reset

Apply

FY Period

Current Period

PTA Filters

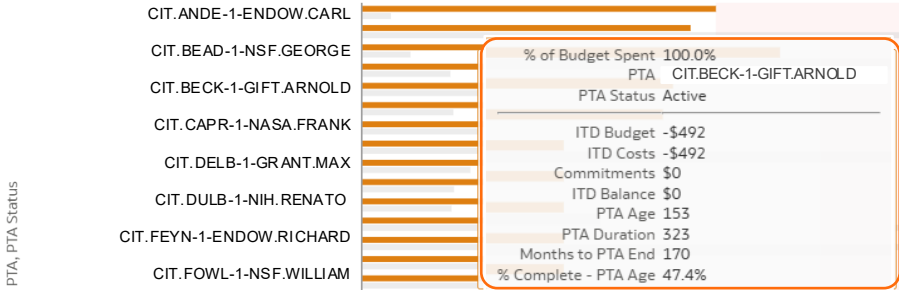
PTA

All

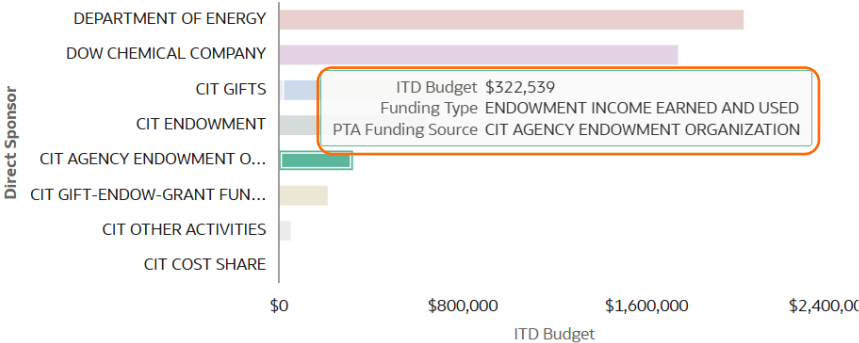
2. **See additional data and details** by hovering over any data point in any section.

Additional details vary by section.

How are my PTAs performing regarding time and budget?



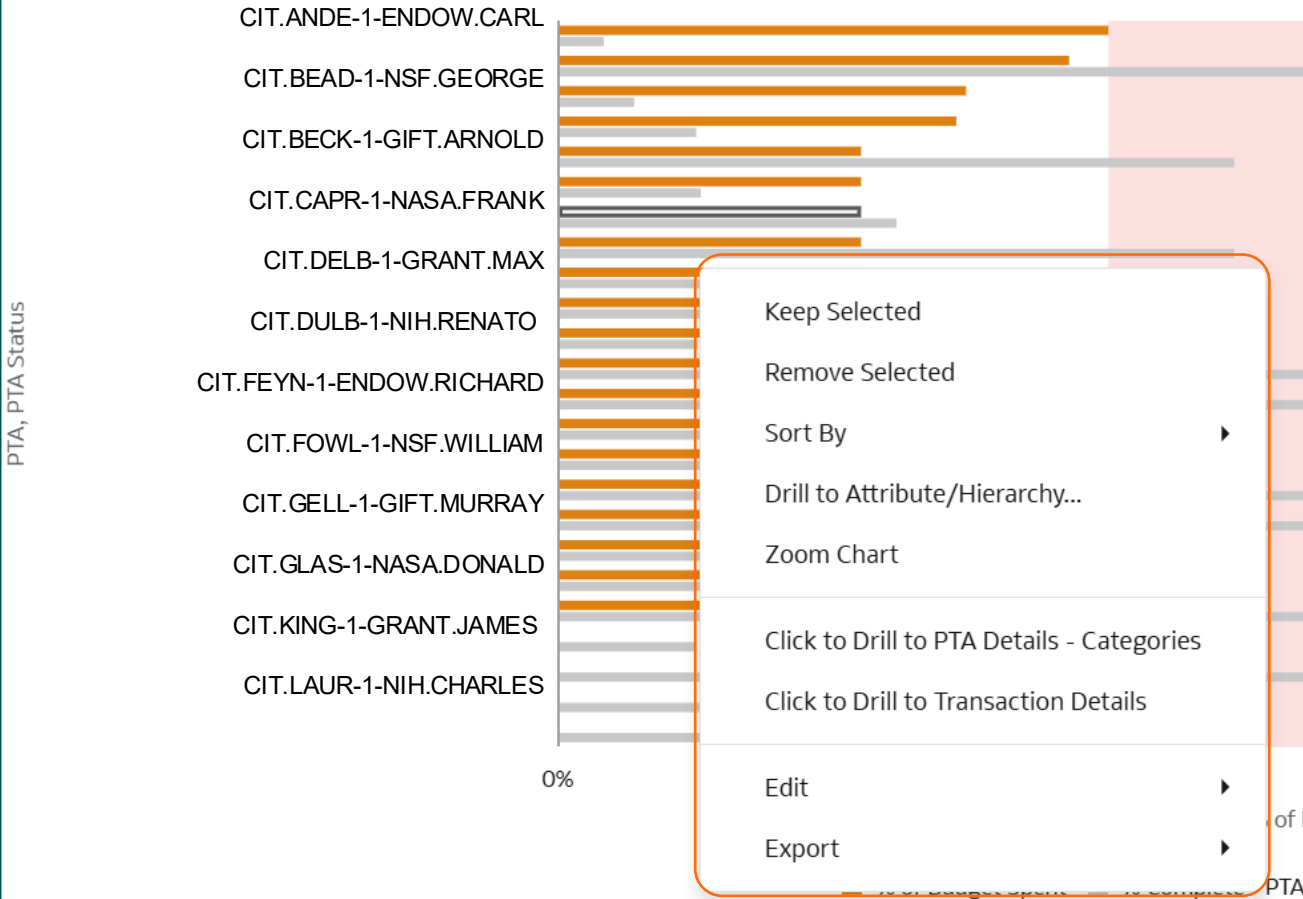
Who are my Top Direct Sponsors?



3. Right click on a data point to view the **Tool Tips menu** with actions you can take. For example:

- **Sort by** various values to customize your view
- **Click Drill to...**to navigate to other dashboards
- **Export** the data to a PDF, PPT, Image or CSV

How are my PTAs performing regarding time and budget?



4. Use the **Back to...** buttons to navigate easily between dashboards.



PTA Details Dashboard

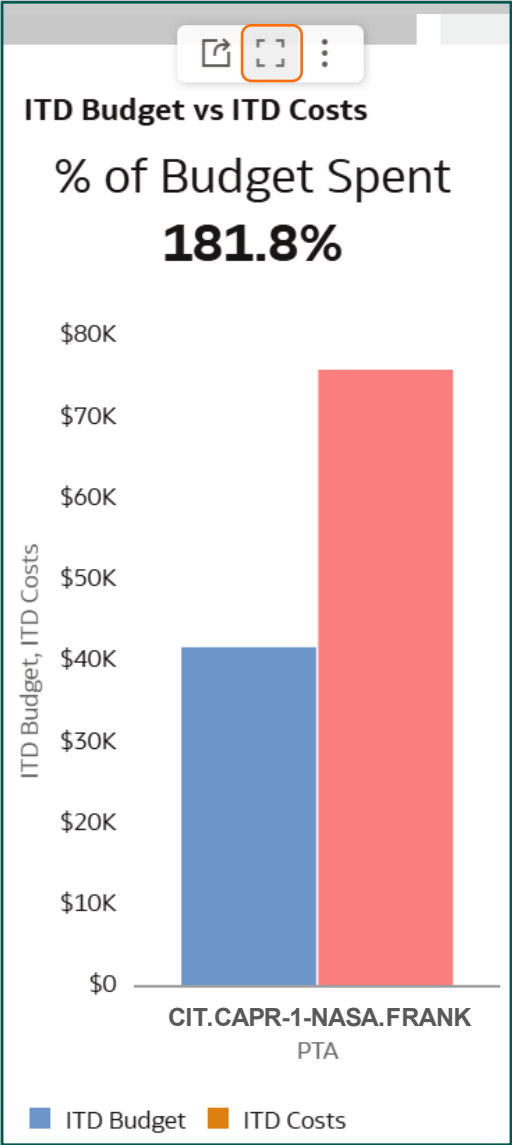
CIT.CAPR-1-NASA.FRANK

Back to PTA Portfolio

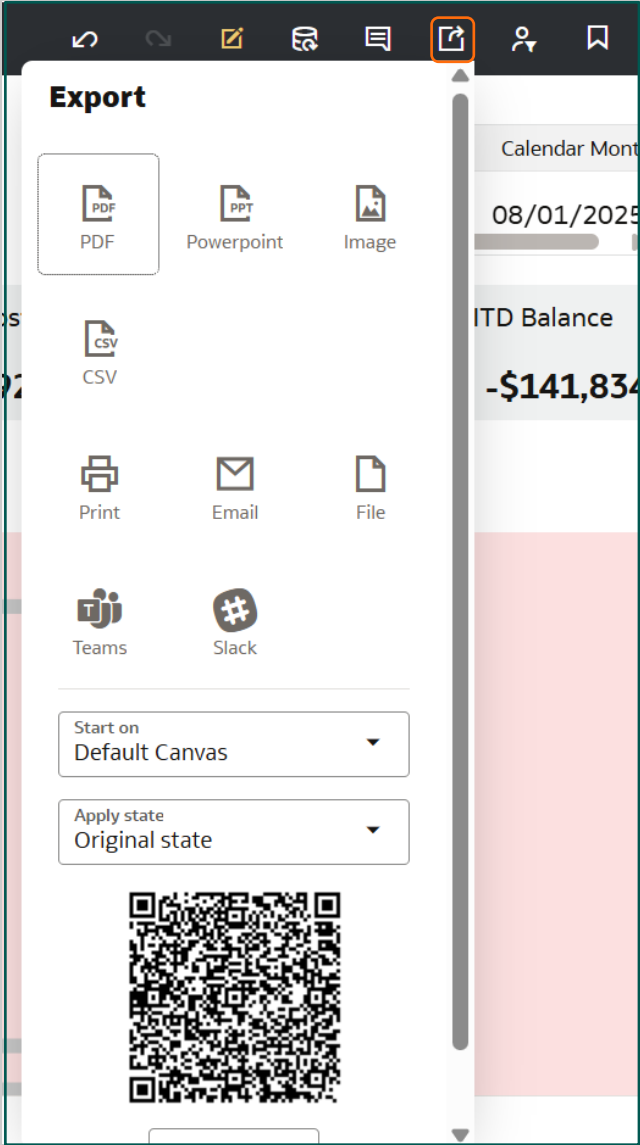
PI Dashboard Navigation Tips

An outline of features and tools available across the PI Dashboards.

5. To **expand** any section into full-screen view, hover over the top and select the expand icon. From the same menu bar, you can **export** (📄) or **see more options** (⋮).

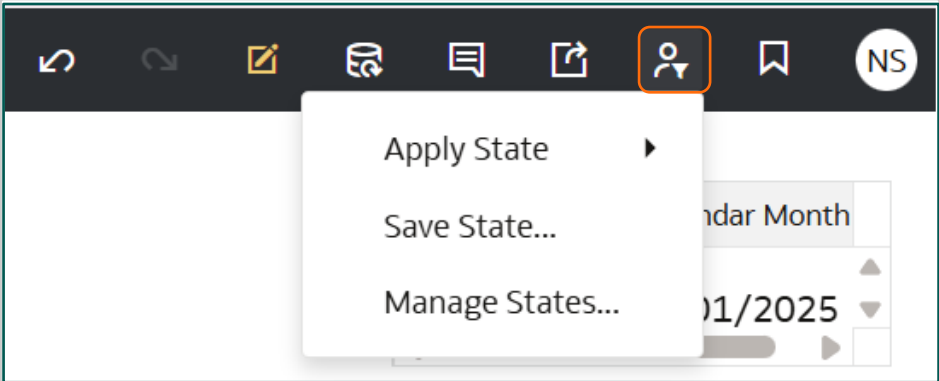


6. In addition to **exporting data** from each graph, you can also export the entire dashboard's data from the export icon on the toolbar in the top right.

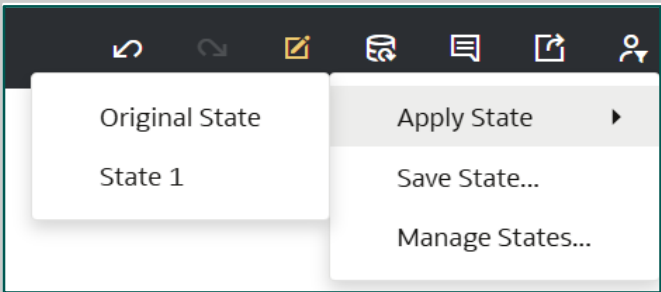


7. **States** can be saved for your dashboards to preserve filters and simplify filter applications with each login.

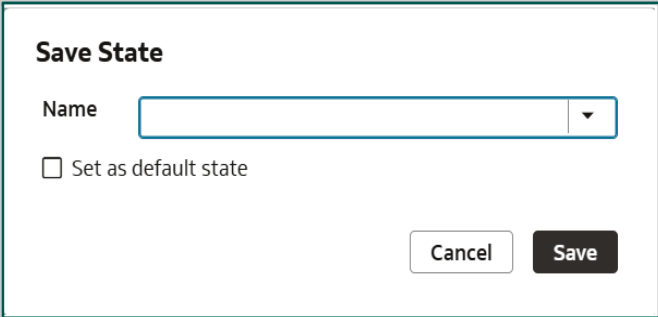
Open the **State Menu** from the person icon in the toolbar. You can save multiple states for each dashboard.



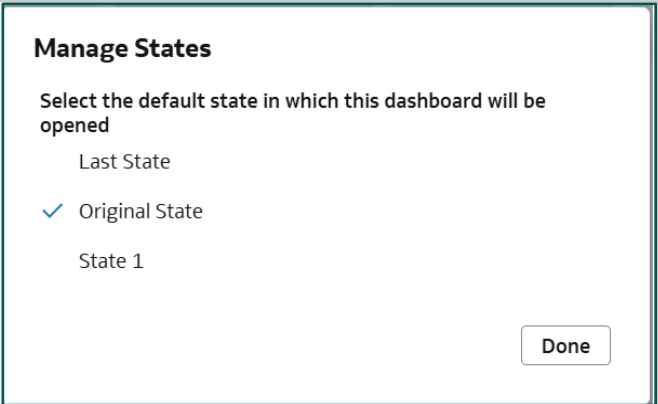
Apply State to select the state you'd like to view.



Save State to save current filters into a new state.
Apply a unique name and click **Save**.
Your new state will now be available under the Apply State dropdown.



Manage States to select the default state. Your dashboard will open with the default state you select.
Click **Done** to save your selection.



PTA Portfolio PI Dashboard

A summary of the sections and graphs available in the dashboard.

1. From the Data Warehouse homepage under **My Analytic Dashboards**, select **PI Dashboard**.

My Analytic Dashboards

PI Dashboard

2. **PTA Portfolio Dashboard** is a landing page to view relevant PTA information.



Find information about:

- PTA Time and Budget Summaries
- Staffing Details
- Sponsors
- Funding Types

Use the **filters menu** to narrow results. Click **Apply** for filters to take effect and **Reset** to return to baseline.

Tips:

- Hover over any bar/point/section in any graph to see additional data.
- Hover over the top of any section and select the **export** icon to export the data, or the **expand** icon to view the section in full-screen.



PTA Portfolio

5. **PTA Summary** displays the time and budget for each of your active PTAs.

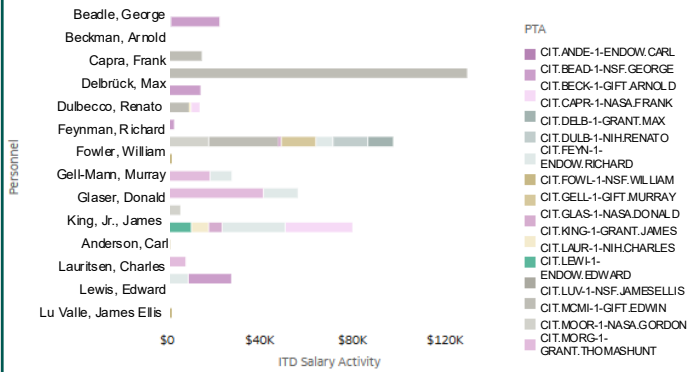
PTA Summary													
PTA	PTA Start ▲	PTA End	PTA Status	% of Budget Spent ▼	ITD Budget	ITD Costs	Period Costs	Commitments	Monthly Burn Rate	ITD Balance	% Complete - PTA Age	Age in Months - PTA	PTA Duration
CIT. ANDE-1- ENDOW. CARL	31-Oct-18	31-Aug-23	Active	100.0%	\$69,568	\$69,568	\$0	\$0	\$859	\$0	139.7%	81	58
CIT. BEAD-1- NSF. GEORGE	01-Oct-20	30-Sep-34	Active	100.0%	\$64,242	\$64,242	\$0	\$0	\$1,108	\$0	34.5%	58	168
CIT. BECK-1- GIFT. ARNOLD	01-Jan-21	30-Jun-25	Active	100.0%	\$215,000	\$215,000	\$0	\$0	\$3,909	\$0	101.9%	55	54
CIT. CAPR-1- NASA. FRANK	01-Feb-22	31-Dec-25	Active	103.8%	\$260,538	\$270,462	\$0	\$0	\$6,440	-\$9,924	89.4%	42	47
CIT. DELB-1- GRANT. MAX		31-Dec-25	Active	84.5%	\$249,461	\$210,834	\$1,129	\$38,627	\$5,020	\$0	89.4%	42	47
CIT. DULB-1- NH. RENATO	15-Jun-22	31-May-25	Active	99.8%	\$335,318	\$334,706	\$0	\$0	\$8,808	\$612	105.6%	38	36
CIT. FEYN-1- ENDOW. RICHARD	01-Oct-22	30-Sep-39	Active	2.5%	\$24,064	\$608	\$0	\$0	\$18	\$23,456	16.7%	34	204
CIT. FOWL-1- NSF. WILLIAM	28-Apr-23	15-Nov-24	Active	100.0%	\$100,000	\$99,999	\$0	\$0	\$3,704	\$1	142.1%	27	19
CIT. GELL-1- GIFT. MURRAY		14-Jun-24	Active	69.4%	\$45,953	\$31,898	\$0	\$0	\$1,227	\$14,055	216.7%	26	12
CIT. GLAS-1- NASA. DONALD		14-Jun-24	Active	1.7%	\$672,342	\$11,746	\$0	\$0	\$452	\$660,596	216.7%	26	12
CIT. KING-1- GRANT. JAMES...	15-Jun-23												

ITD Balance < 0

D

6. **Personnel Overview** shows who is working on each of your PTAs, and details about salary activity and labor commitment.

PTA Personnel Overview



PTA Personnel Overview

PTA	PTA Award Manager	Award Division	Personnel Name	Personnel Type	ITD Salary Activity	Labor Commitment
CIT. GELL-1- GIFT. MURRAY	Bae, Jane		Anima Anandkumar	Academic Faculty	\$0	
CIT. GLAS-1- NASA. DONALD					\$0	
CIT. KING-1- GRANT. JAMES	Bae, Jane		Andrew M Stuart	Academic Faculty	\$21,216	
			Edoardo Calvello	Student-Employee	\$14,277	
			George Stepaniants	Academic Non-Faculty	\$2,808	
			En. Talan	Academic Non-Faculty	\$19,750	

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PTA Details PI Dashboard

A summary of the sections and graphs available in the dashboard.

1. To open the **PTA Details** Dashboard, select one of the PTAs from the **Time and Budget** graph on the PTA Portfolio Dashboard.

How are my PTAs performing regarding time and budget?

CIT.ANDE-1-ENDOW.CARL
CIT.BEAD-1-NSF.GEORGE
CIT.BECK-1-GIFT.ARNOLD



2. **PTA Details Dashboard** is a landing page to view details about a specific PTA.

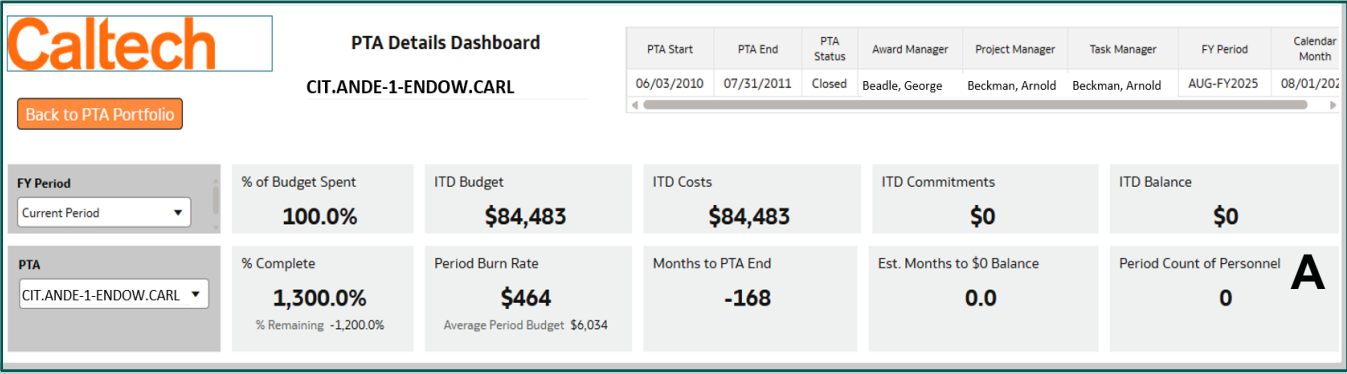
- Find information about:
- KPIs
 - Budget/Cost Details
 - Burn Rate
 - Labor Commitment



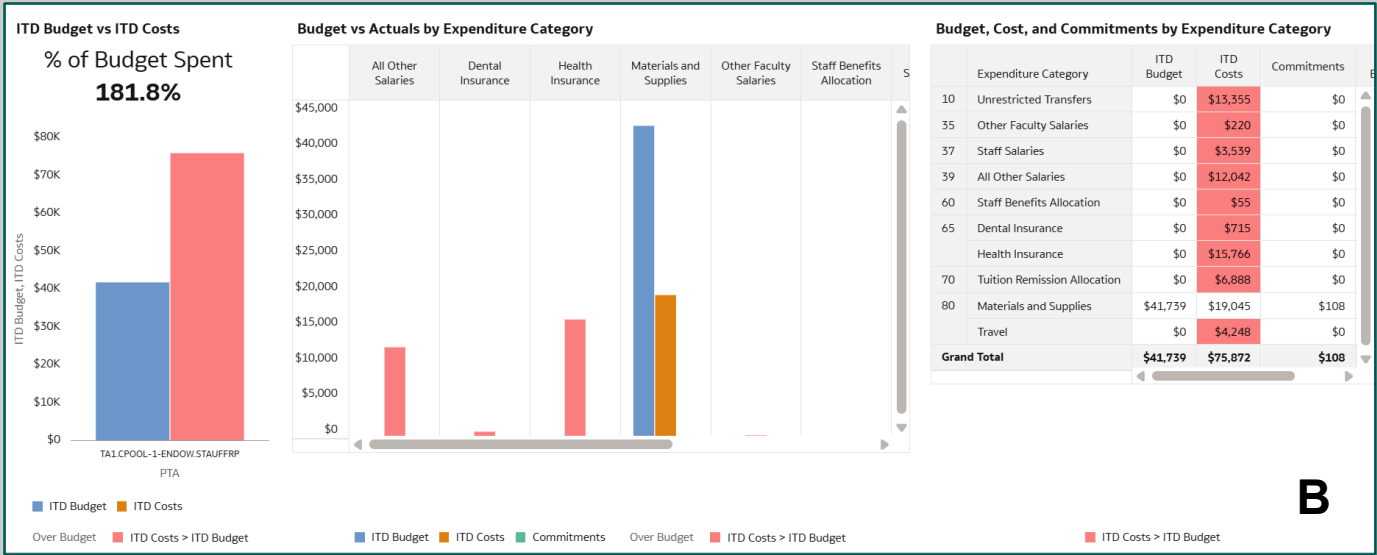
- Tips:**
- Hover over any bar/point/section in any graph to see additional data.
 - Hover over the top of any section and select the **export** icon to export the data, or the **expand** icon to view the section in full-screen.



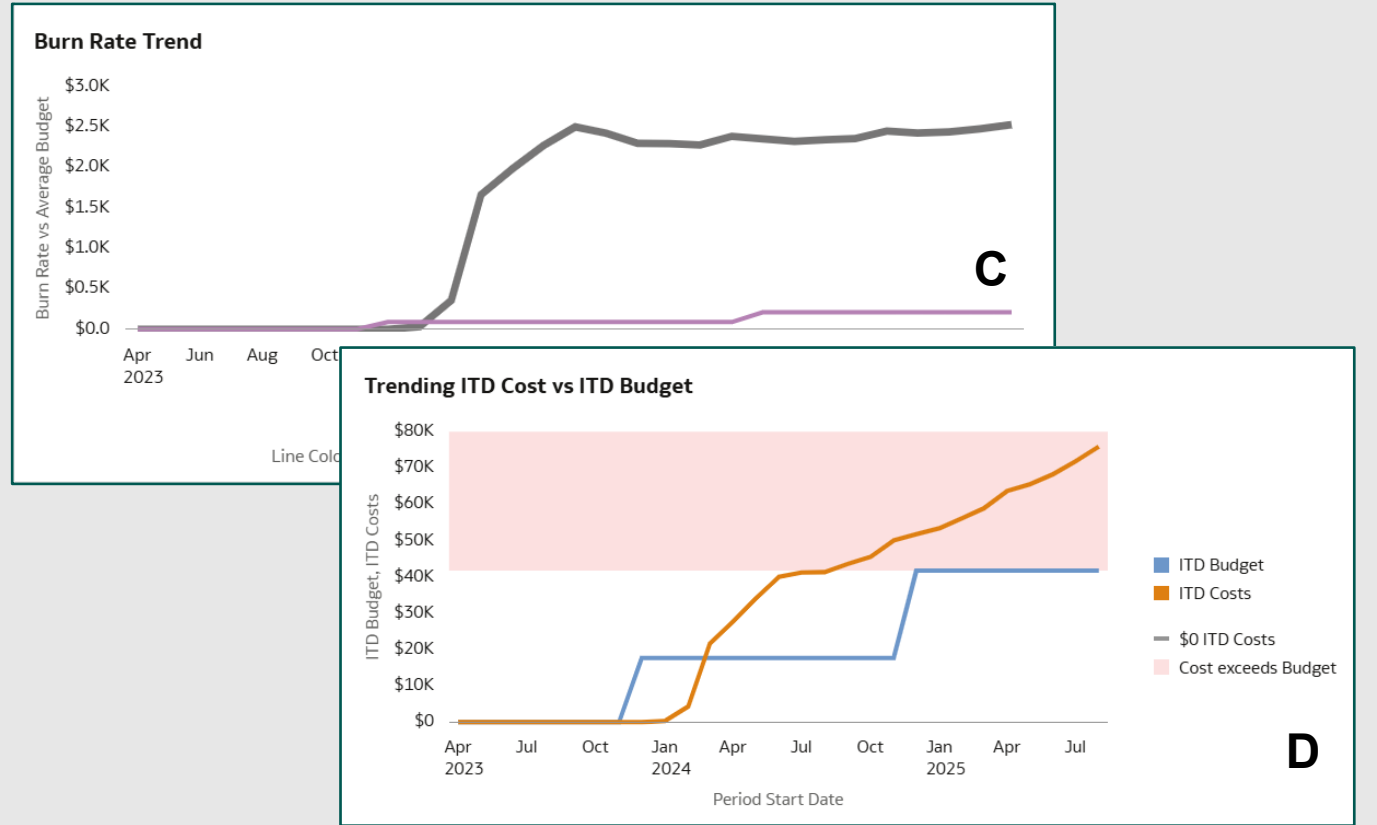
3. **KPIs: Key Performance Indicators** summarize data for this PTA.



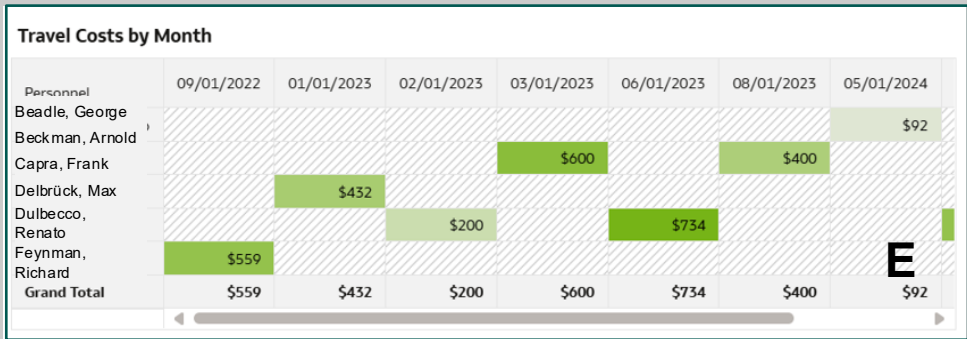
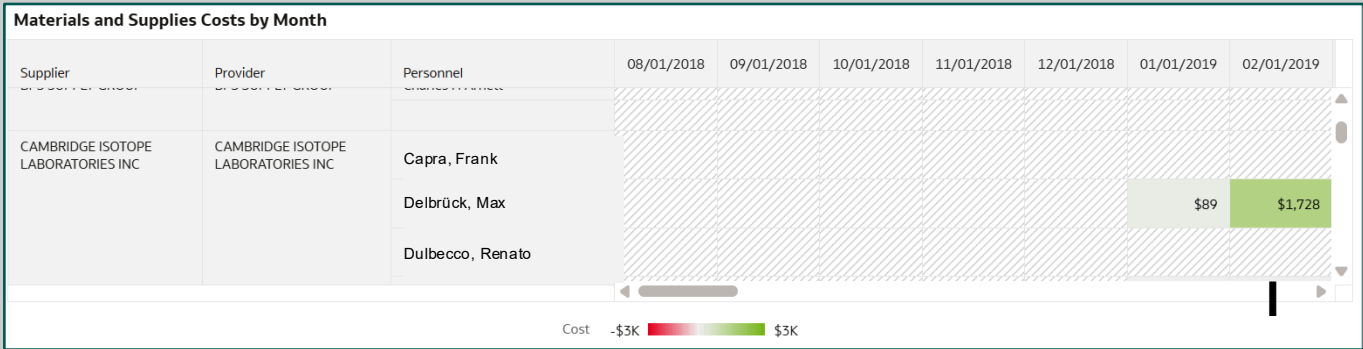
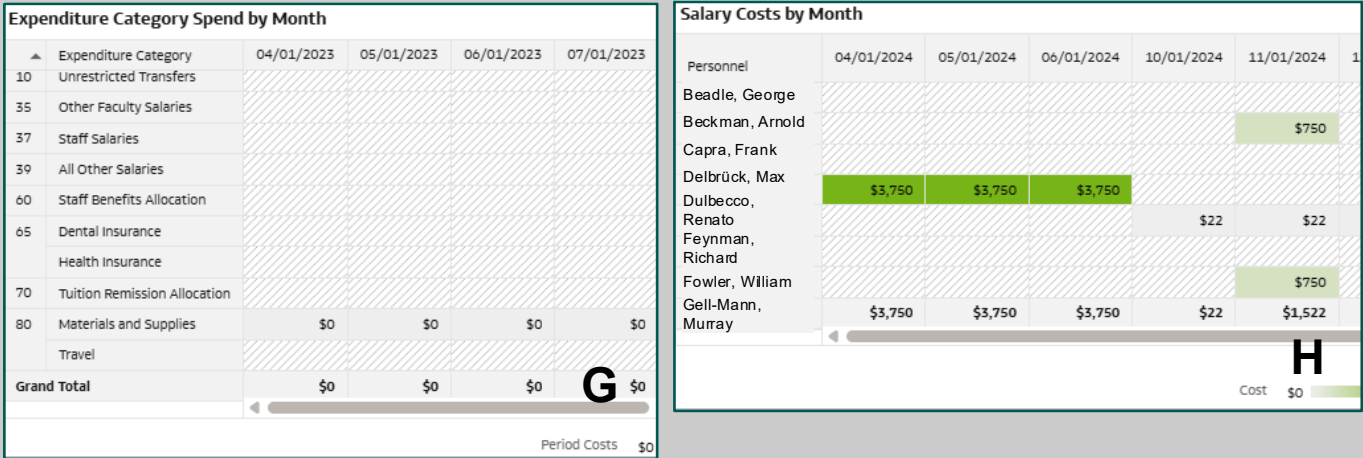
4. **Budget vs Actuals** shows PTA budgets and costs details by expenditure category.



5. **Burn Rate and Costs by Month** shows trends with burn rate and costs vs budget expectations.



6. Costs by Month breaks down spending by expenditure category per month.



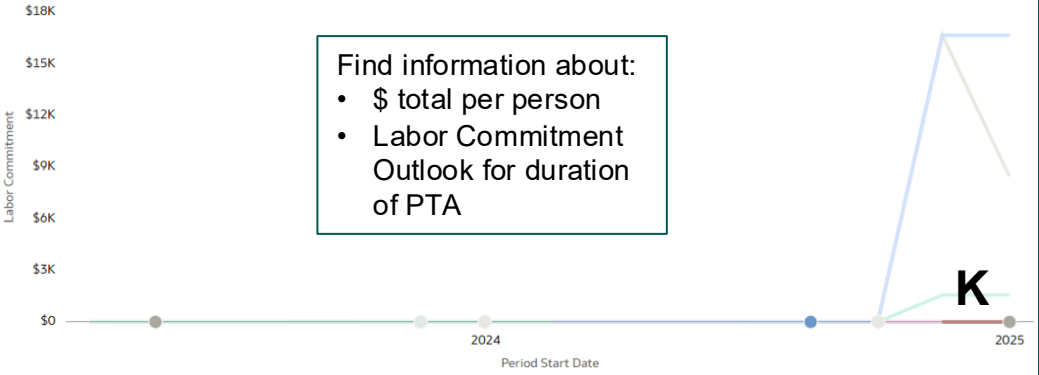
7. Labor Commitment information is available for all personnel staffed on the PTA.

Period Labor Commitment Summary

Personnel	Labor Commitment
Beadle, George	\$0
Beckman, Arnold	\$0
Capra, Frank	\$0
Delbrück, Max	\$0
Dulbecco, Renato	\$0
Feynman, Richard	\$8,467
Fowler, William	\$16,652
Gell-Mann, Murray	\$0
Glaser, Donald	\$1,570
King, Jr., James	\$16,652

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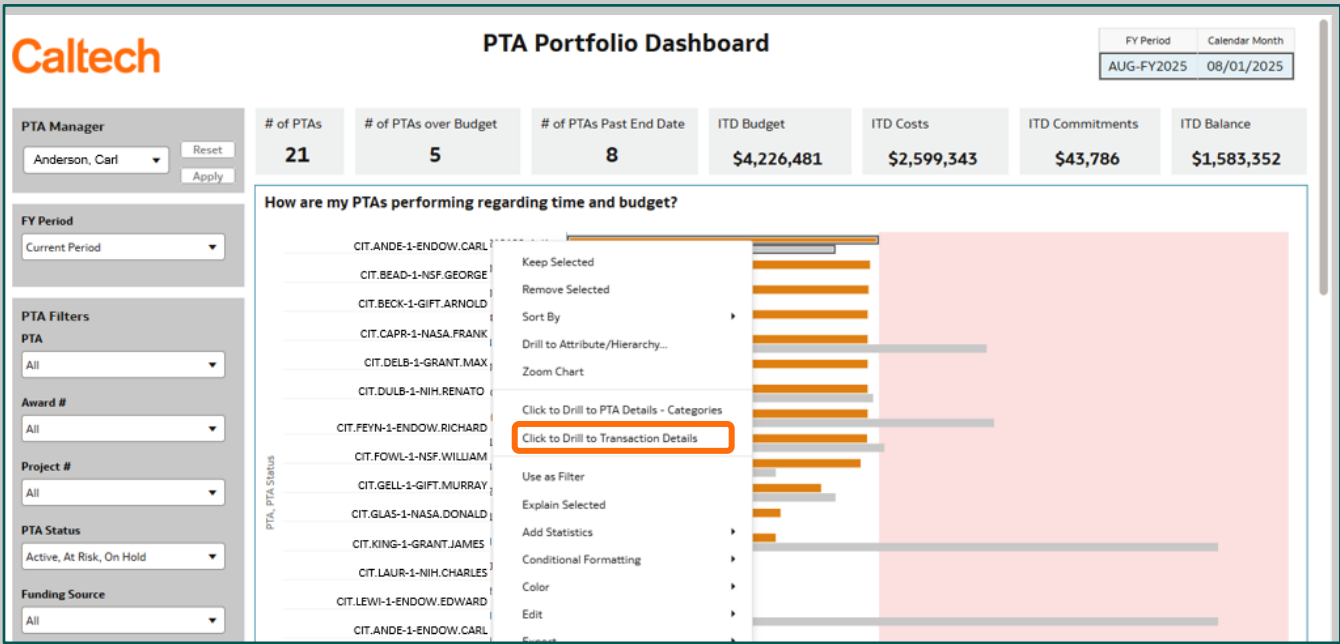
Labor Commitment Outlook



Transaction Details PI Dashboard

A summary of the information available in the dashboard.

- From any graph on the **PTA Portfolio Dashboard**, hover over a PTA to see the pop-up menu. **Click to Drill to Transaction Details**.



- The **Transaction Details Dashboard** includes details at the transaction level for a given PTA.

Back to PTA Portfolio Back to PTA Details

PTA: HUBWAVELET-1-AFOSR.502210109 Expenditure Category: All Period Start Date: Full Range Personnel: All

Provider	Supplier	Personnel	IC?	Expenditure Type	Exp Comment	Exp Item Date	Cost
IC - ATHENAEUM	IC - ATHENAEUM		Y	Food	ATH CHGS September 2023	09/30/2023	\$21.00
IC - ATHENAEUM	IC - ATHENAEUM		Y	Other Internal Charges	ATH CHGS September 2023	09/30/2023	\$4.20
Y Total							\$25.20
AMERICAN PHYSICAL SOCIETY	US BANK	Beadle, George	N	Dues-Allocable	APS Membership for Ballout	11/10/2023	\$39.00
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2022 Calendar Month 10 Regular Pay	10/31/2022	\$1,756.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2022 Calendar Month 11 Regular Pay	11/30/2022	\$1,756.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2022 Calendar Month 12 Regular Pay	12/30/2022	\$1,756.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2022 Calendar Month 9 Regular Pay	09/30/2022	\$3,225.00
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 1 Regular Pay	01/31/2023	\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 10 Regular Pay	10/31/2023	\$3,853.33
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 11 Regular Pay	11/30/2023	\$3,853.33
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 12 Regular Pay	12/29/2023	\$3,853.33
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 2 Regular Pay	02/28/2023	\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 3 Regular Pay	03/31/2023	\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 4 LDA: 7/24/23-spowell-x2909-1	04/28/2023	-\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 4 Regular Pay	04/28/2023	\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 5 LDA: 7/24/23-spowell-x2909-1	05/31/2023	-\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 5 Regular Pay	05/31/2023	\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 6 LDA: 7/24/23-spowell-x2909-1	06/30/2023	-\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 6 Regular Pay	06/30/2023	\$3,416.67
CALTECH PAYROLL	CALTECH PAYROLL	King, Jr., James	N	Grad Assistantships	2023 Calendar Month 7 LDA: 7/24/23-spowell-x2909-1	07/31/2023	-\$3,416.67
Grand Total							\$270,461.84

PTA Portfolio PTA Details - Categories **Transaction Details** 291 Rows, 8 Columns