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CU I&E Submission: PI Dashboard [1]

Team Information

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What

CIRES IT created an online tool, called the ‘PI Dashboard’, that allows for a ‘one-stop-shop’ for CIRES Principal Investigators to access detailed financial information related to the sponsored projects, contracts and programs that they manage. It was created within the CIRES Intranet website called InsideCIRES.
The PI Dashboard is a tool that has allowed for more streamlined communication between CIRES Finance Managers and PI’s. As finance managers reconcile projects/programs each month, PI's are able to view their updated summary reports online. In addition to the summary report, PI’s can also view financial detail transactions up until the most recent month that has closed.
This tool has facilitated a business process improvement for how finance managers disseminate summary reports. This has translated into both a cost and time savings. It has also allowed for enhanced customer service from IT and CIRES Finance to our PI’s in allowing them ease of access and user-friendly interfaces to aid in the financial management of their projects and programs.

Why

A major challenge facing PI’s when managing multiple projects or programs is tracking the impact that any planned future costs will have on their available balance. The University provides reports to PI’s and administrators to look backwards at existing expenses, but it is challenging to track and encumber future costs. Previous to the PI Dashboard, PI’s were sent a static PDF summary report via email. Any change in the spending plan meant another report had to be sent to the PI. Being online, the summary report now dynamically updates as encumbrances are added or removed.

When

The PI Dashboard was officially released on Friday January 17th, 2020 via an email from our CIRES IT group to approximately 150 CIRES PI’s.

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-pi-dashboard

Links
[1] https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-pi-dashboard
[2] mailto:marc.cloninger@colorado.edu