Submitted by: Robert H. Wells, Office of Research, Interim Director of Research Communications
Submitted on behalf of: Joseph Harrington, Interim Associate Vice President for Research and Scholarship

Subject: Revised PI Dashboard Available Nov. 29, Feedback Requested

Dear Faculty,

A significant revision of the PI Dashboard in Workday will become available on Wednesday, November 29. The Dashboard lets faculty with grant or startup accounts view their budgets, expenses, and payroll.

This version is easier to use, has nearly the full functionality of PARIS, and is more information-dense than the prior version. Training sessions and videos will be available for faculty. Please see below for more details.

The PI Dashboard complements the services provided by college/unit Finance Business Centers. Your FBC has additional reports and tools to support faculty researchers.

**Accessing the PI Dashboard**

Search for "PI Dashboard" in Workday to access the tool (starting Wednesday, November 29).

Once in the Dashboard, CLICK THE GREEN CIRCLE for succinct instructions. Most testers who read these instructions were able to use the Dashboard within minutes. Support is available from your college/unit Finance Business Center and Office of Research staff.

**Key Features of the Revised PI Dashboard**

• Simplified setup (compared to first version)
• Succinct documentation directly in the tool
• Glossary translating Workday into English
• In-depth documentation, video training, and help resources
• Both PI and Co-PI grants listed
• Reports present the interesting information first
• Drill down from actual expense totals to the expense reports behind them
• Award Budget Position Report can combine totals of one or more grants
• Download data to Excel or PDF

**Reports**

• My Grants - Non-Money
• Grant Budget Summary
• Non-Grant - Overhead/Gift/Designation Summary (also balance, prize, startup accounts)
• Award Budget Position
• My People
• Payroll

**Training Sessions**

For those interested, we will offer instructor-led training in the weeks after release and in January, if there is demand. Zoom trainings will be capped at the Zoom capacity of 300. Arrive early to secure your spot! The sessions will be recorded and made available. Training session dates are:

• 11/29 W       3:00 – 4:00 p.m.
• 11/30 TH     9:00 – 10:00 a.m.
• 12/1 F        1:00 – 2:00 p.m.
• 12/4 M      9:00 – 10:00 a.m.
• 12/6 W       1:00 – 2:00 p.m.
• 12/7 TH     11:00 a.m. – 12:00 p.m.

To join the Zoom Meeting:

https://ucf.zoom.us/j/99783668980

Please send feedback to research@ucf.edu with "PI Dashboard" in the subject line, so we can consider it for the next release.

We thank the Faculty Senate Research Council, ten faculty testers, and the Workday Enterprise System Team for their contributions to this update.

Thanks,

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Prof. Joseph Harrington
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