

## Dietrich School of Arts and Sciences Sponsored Projects Account Access in Tableau

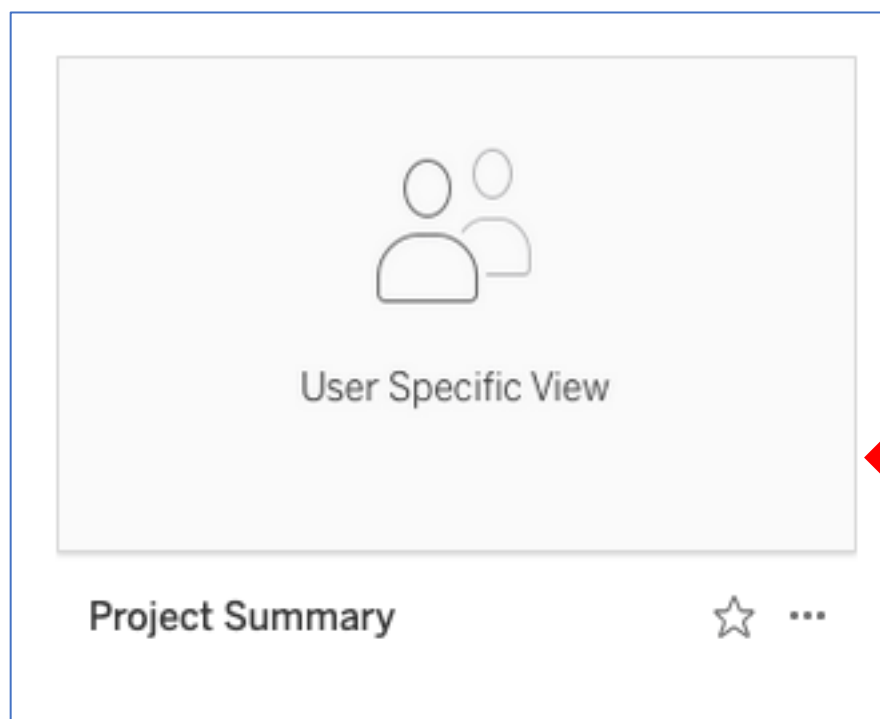
*This guide will walk principal investigators through the process of accessing their account balances and breakdowns in Tableau. Please pay close attention to the definitions of the column headings and their descriptions, as this information is essential to understand what the dates and amounts in these reports represent.*

Questions about account information can be directed to the post-award administrator for your department. If you are unsure who this is, please consult our [departmental assignments website](#).

1. To access the Project Summary Report, [click here](#), or copy and paste this URL into your browser:


**[https://analytics.pitt.edu/#/site/u/workbooks/5508?origin=card\\_share\\_link](https://analytics.pitt.edu/#/site/u/workbooks/5508?origin=card_share_link)**

2. Click on the Project Summary Report



3. Select a project from the dropdown list:

Project Summary
Account Breakdown
Employee Details
Employee Details by Month


University of Pittsburgh  
Dietrich School of Arts and Sciences

Sponsored Projects Administration





Project Summary

Department
Project

(All)
(All)

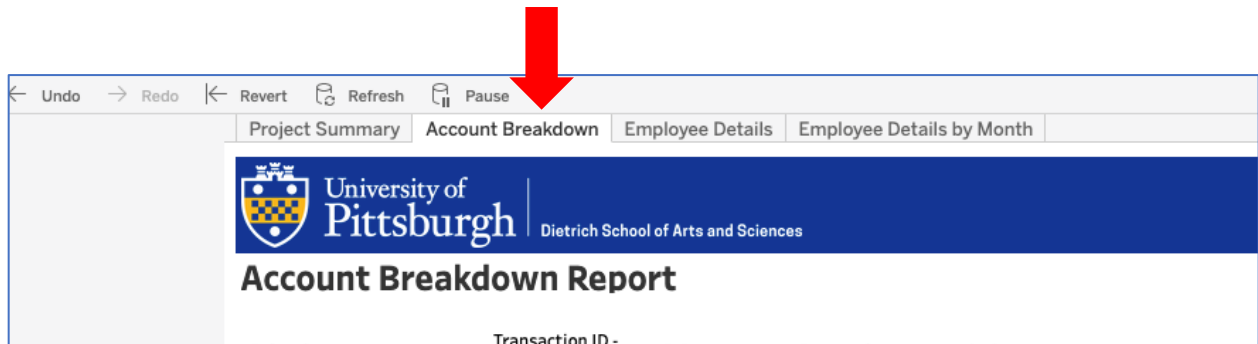
In the view below, you will see four columns...

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			 Project Budget	 Project To Date Encumbrance	 Project to Date Actual	 Budget Funds Available
Total Project Costs	Compensation	5100 - Non-Medical Faculty RFT Regular Earnings	97,933	23,977	16,991	56,965
		5110 - Non-Medical Faculty RFT Summer Term	0	0	27,804	-27,804
		5111 - Non-Medical Faculty RFT Summer Sessions	0	0	3,407	-3,407
		5660 - GSR-PHD Regular Earnings	82,809	0	0	82,809
		5903 - Fringe Benefits-Non-Medical Faculty	29,673	6,905	13,794	8,974
		5913 - Fringe Benefits-GSR-PhD	41,404	0	0	41,404
		Total	251,819	30,883	61,997	158,940
	Non-Compensation	6000 - Office Supplies	0	0	92	-92
		6010 - Scientific & Clinical Supplies	1,500	0	0	1,500
		6021 - Computer Supplies	2,220	0	601	1,619
		6030 - Other Supplies	0	0	226	-226
		6080 - Interdept Office Supplies-Non-Book Cente...	0	0	131	-131
		6300 - Domestic Travel & Business Expenses	6,000	0	140	5,860
		6370 - Foreign Travel	9,000	0	0	9,000
		Total	18,720	0	1,190	17,530
	Indirect Costs	8350 - Indirect Costs	129,461	17,449	35,700	76,312
		Total	129,461	17,449	35,700	76,312
Total		400,000	48,332	98,886	252,782	
Grand Total		400,000	48,332	98,886	252,782	

- **Project Budget:** This is the total amount awarded to date, broken out by line budget line item. This does not include anticipated future funding not yet received.
- **Project to Date Encumbrance:** This is the amount of costs encumbered (i.e. obligated) but not yet charged to the account.
- **Project to Date Actual:** These amounts represent all charges that have hit the account since the start of the project.
- **Budget Funds Available:** This is the unobligated balance available to spend.

4. If you click on the Account Breakdown tab at the top of the screen, you will see a breakdown of all non-compensation costs incurred or encumbered on the account to date.
5. If you click on the employee details tab at the top of the screen, you will see a list of all personnel currently or previously charged to the account. ***Note: any personnel changes not yet processed by Payroll will not be reflected in these amounts.***



To access the PI Portfolio Report, [click here](https://analytics.pitt.edu/#/site/u/workbooks/5664?:origin=card_share_link), or copy and paste this URL into your browser:

**[https://analytics.pitt.edu/#/site/u/workbooks/5664?:origin=card\\_share\\_link](https://analytics.pitt.edu/#/site/u/workbooks/5664?:origin=card_share_link)**

1. The first screen will show a list of all active awards, with account number, sponsor name, start/end dates, and the same financial data as in the Project Summary Report.
2. If you click on a project line, it will take you to the Project Summary tab, which contains a breakdown of all costs (compensation and non-compensation) incurred or encumbered since the start of the project.
3. If you click on an individual line, you will be taken to the Detail tab, with full details for all costs incurred or encumbered for that line item.