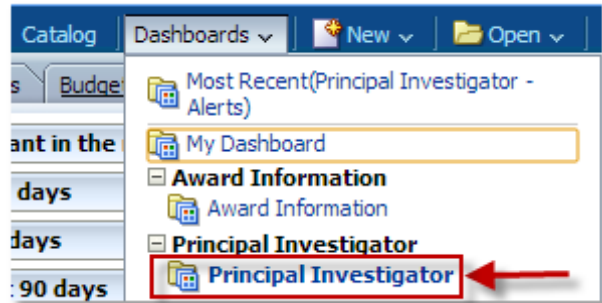


Quick Start Guide

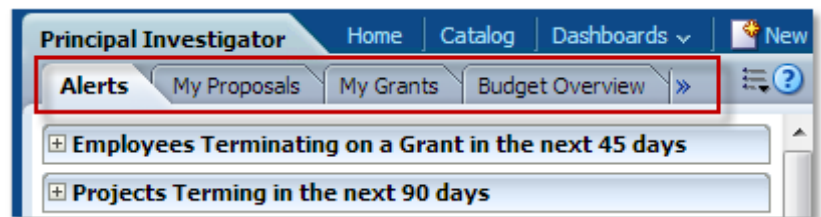
Principal Investigator (PI) Dashboard

1 The **RF Report Center** is accessed through the RF website (See the *Access the Report Center Quick Start Guide* for both InCommon and “Click-Through” instructions).

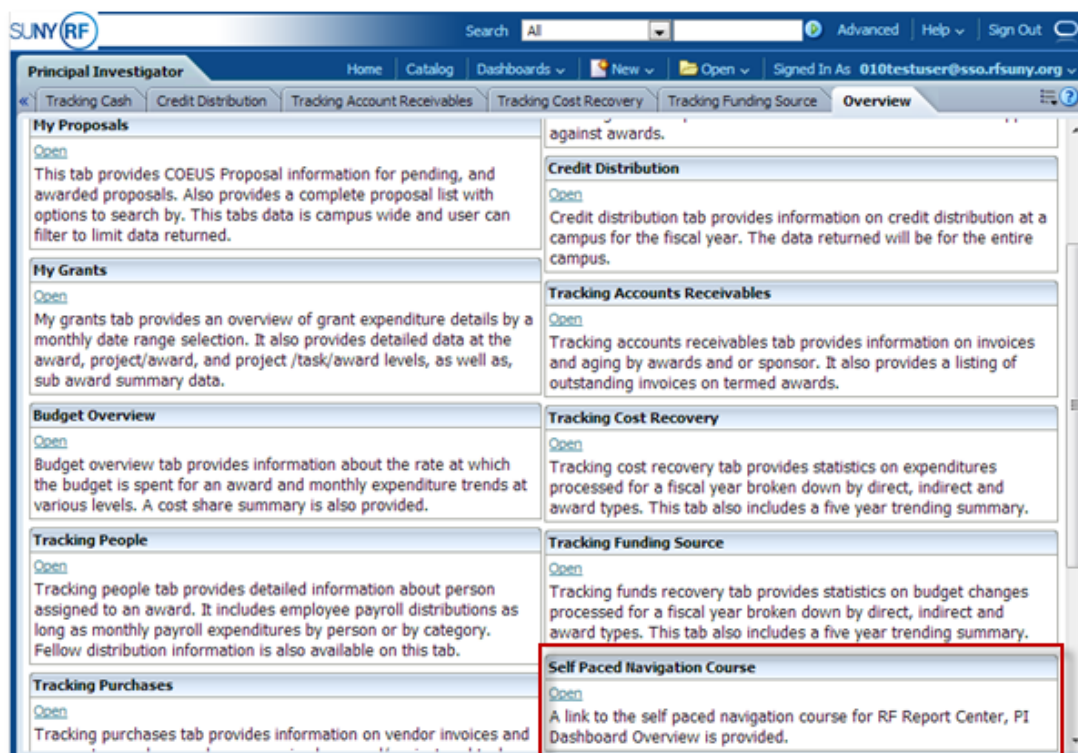
2 From the RF Report Center menu, under **Dashboards**, select **Principal Investigator**.



3 The **PI Dashboard** has pages, known as tabs, each displaying key award, project, and/or task data.



4 The **Overview** tab has all tab descriptions and links to appropriate support materials and training.



5

Select a tab within the PI dashboard.

TABS
Navigate between tabs.

FILTERS
Apply criteria to your results with drop downs.
Click "Apply" to run.

PAGE OPTIONS
Advanced features menu for dashboard configurations.

The screenshot shows the SUNY RF Principal Investigator dashboard. The 'My Grants' tab is selected. The dashboard includes a navigation bar with tabs like 'Alerts', 'My Proposals', 'My Grants', 'Budget Overview', 'Tracking People', 'Tracking Purchases', 'Travel', 'Monthly Summary', 'Tracking Cash', and 'Credit Distr'. Below the navigation bar, there is a section titled 'Grant Expenditure Detail By Monthly Date Range'. This section contains several filter fields: 'Award Number' (000075), 'Award Name', 'Project Number', 'Task Number', and 'Expenditure Category'. A date range filter is set to 'Between 09/02/2013 - 09/06/2013'. There are 'Apply' and 'Reset' buttons. A 'Page Options' menu is open on the right, showing options like 'Edit Dashboard', 'Print', 'Export to Excel', 'Refresh', 'Add To Briefing Book', 'Create Bookmark Link', 'Create Promoted Link', 'Apply Saved Customization', 'Save Current Customization...', 'Edit Saved Customizations...', and 'Clear My Customization'. Below the filters is a table with columns: Award Number, Project Number, Task Number, Expenditure Type, Employee Name, Vendor Name, PO Number, PO Description, Accounts Payable Invoice Number, Accounts Payable Invoice Description, Expenditure Item Date, Posted Date, and Total Expense Amount. The table contains one row of data for Award Number 000075, Project Number 1007605, Task Number 1, Expenditure Type SUP Office Supplies, Employee Name UNSPECIFIED, Vendor Name Proftech LLC, PO Number UNSPECIFIED, PO Description UNSPECIFIED, Accounts Payable Invoice Number 3202568922, Accounts Payable Invoice Description BULK BILL: REFUND ON ORIG. INV. # 3202568922 - HP TONER CARTRIDGE (501A & 502A), ROLODEX EXPRESSIONS MESH CARD, Expenditure Item Date 20-Jul-2013, Posted Date September - 2013, and Total Expense Amount -201.94. Below the table are 'Supplies Total' and 'Grand Total' rows, both showing -201.94. At the bottom of the table are links for 'Refresh', 'Print', and 'Export'.

[Refresh](#) - [Print](#) - [Export](#)

Refresh: Click Refresh to re-run the analysis

Print: Click Print and select either a printable PDF or a printable HTML document.

Export: Click Export and download your data

- As a printable PDF, an Excel worksheet, a PowerPoint slide, or a Web Archive file.
- As a CSV file, or an XML, or a Tab Delimited file.

For more information, go to the Self Pace Navigation Course located on the **Overview** tab.