

Finance -- PI Expenses

Project Investigator Expenses

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<https://dataviz.med.wisc.edu/sense/app/b9d47743-ab60-4bfc-9d4f-6c14c865a456/overview>

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Finance

Brief Description	This app provides expense transaction details for Principal Investigators that have had a project in a subset of Financial Shared Services departments.
Data Classification	Internal
Developer	Melissa Chan
Primary Audience	The SMPH Fiscal Affairs Accountant pulls data from the app for Department Administrators, Financial Specialists, and PIs. Those with access to the Finance Stream can view the app.
Data Sources	FINANCE_QVDs_WISDM: GL_STAR_FACT (non payroll), PAYROLL_STAR_FACT (payroll), ACCOUNT_DIMENSION, DATE_DIMENSION, DEPARTMENT_DIMENSION, EMPLOYEE_HISTORY_DIMENSION, JOURNAL_REFERENCE_DIMENSION, PROJECTS_FINANCE_QVDs_AADW: WAWR_SFS_PROJECTS_TB
Data Load Schedule	Sundays
Definitions	PI Department - One of the 5 Financial Shared Services departments. This is the department where a Principal Investigators has had at least one project. Account Category - This is WISER's Account Description originating from ACCOUNT_TREE_ANC_VW. ANCESTOR_DESCR.
Plans for Future Development	
Additional Notes	<p>This app includes current and previous fiscal year data. For year-end processes this app continues to show these fiscal years until August 15th, at which time the app switches to the next set of fiscal years. Data may lag behind WISER by 1 or 2 days depending on refresh times.</p> <p>This app includes the following departments: 5311 Cell and Regenerative Biology 5312 Biostatistics & Medical Informatics 5348 Medical Physics/Medical Biotech 5362 Department of Neuroscience 5377 Biomolecular Chemistry</p> <p>This app excludes the following: - Fringe Pool Clearing funds - SMPH Medical School Development Funds (defined as Fund 233 in the SFS.WAWR_SFS_PROJECTS_TB table) - Indirect costs in Account 3930 Transfer-Overhead Allowance - Accounts beginning with 'Z' - Budget, Encumbrance, and Revenue transactions</p>