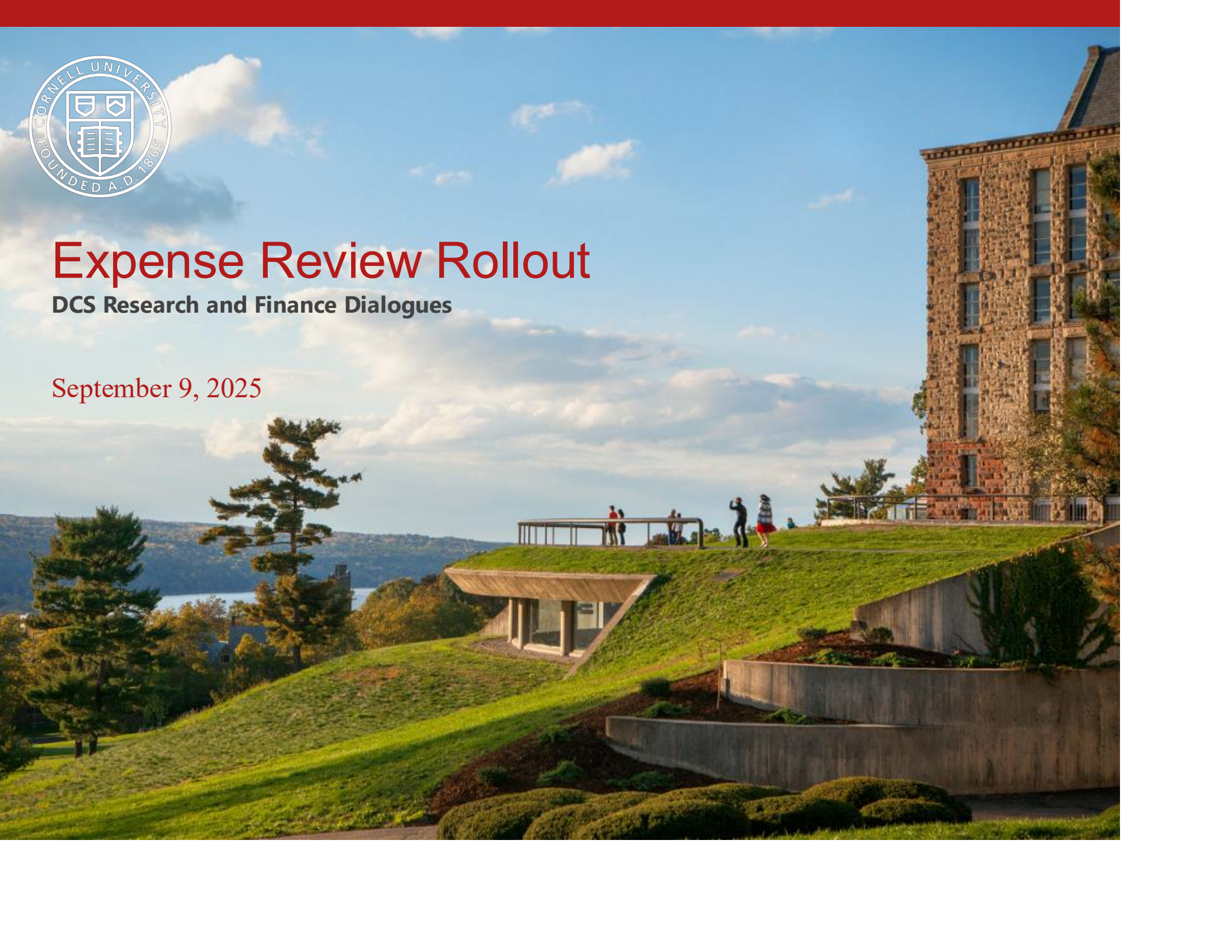


Expense Review Rollout

DCS Research and Finance Dialogues

September 9, 2025





Presentation will address

- Timeline & Communications
- RA Workflow & Demo
- PI Workflow & Demo
- How do I learn more?





Project Timeline

Stage	Status	Timeframe
Fund and setup project	Complete	Spring/Summer 2024
<i>Discovery & website design</i>	Complete	Fall 2024
Advisory cmt mtg: Discovery review	Complete	November 19, 2024
<i>User testing & technical design</i>	Complete	Late Fall 2024
<i>Project awareness outreach</i>	Complete	December / January
Implement tool & develop rollout plan	Underway	Dec 2024 – Dec 2025
<i>Pilot with faculty and administrators</i>	Underway	July 2025 - Current
Advisory cmt mtg: Rollout plan review		Sept 15, 2025
<i>Rollout to all RAs and Faculty</i>		October 2025
Stabilization, Improvements		Winter 2025-2026





Important Dates

Next Week	<ul style="list-style-type: none">- Final "Go / Delay" Decision- Mailings<ul style="list-style-type: none">o College Executiveso RAso Faculty
Late Sept	Software goes live with July & August reports
Oct 6	First monthly notification for RAs Expected to "pre-review" July, Aug, Sept reports
Oct 15	First monthly notification for PIs Expected to record reviews for July, Aug, Sept
Oct-Dec +	<ul style="list-style-type: none">• Ongoing outreach• Solicit feedback• Additional features• Additional user testing



Act-As Access

- You *must set up Act-As access* in the ODA dashboards for all the faculty you support
- The PI Dashboard imports Act-As permissions each morning
- See guide.pidash.cornell.edu/act-as for more information



User Experience






Administrators

- Reports are available early in the month
- Maybe “pre-”review your Account Managers’ (AMs) reports
 - Add transaction notes
 - Add summary note
- Address AM’s questions as they come in
- Maybe meet w/ AM
- Monitor review completion
 - Login to see completion status







Landing Page



PI Dashboard

[PI Dash Guide](#) [Access Info](#) [Chat with us](#)


[Act As](#) [Finances](#) [Personnel](#) [Transactions](#) [Expense Review](#) [Proposals](#)


 [User Joe Doe](#) 

Act As

Select the person you would like to act as.

Search

Name	Projects Near Term	Employees Near Term	Review Status	Receive Notifications About This Person 
Dawn Sirols				
Paula Cohen	4	2	Overdue go+	<input checked="" type="checkbox"/>
Mason Peck	2	1	Reviewed	<input type="checkbox"/>
Maha Haji	1		Needs Review	<input type="checkbox"/>

[University Privacy](#) [Sitemap](#) [Web Accessibility Assistance](#) 





Expense Review

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FOUNDED A.D. 1865

PI Dash GuideAccess InfoChat with us

FinancesPersonnelTransactionsExpense ReviewProposals

🔔 User Joe Doe ▾

Expense Review

Selecting a month will display its data

July 2024 ▾

Sponsored AccountsNon Sponsored

Show F&A and Benefit Expenses (75) +Show Expenses Under \$75 (45) +

July 2024 Add July Summary +

86708: GATES 2: Transition as a Novel Contraceptive Target >

Account Number: 4358679: Gates Fdn 141102 Meiosis Cohen >

Salary and Wages

Name	Job Title	Term Date	% of July Pay	Amount		
Lillian Santana	Graduate Research Assistant	12/31/2024*	10%	\$2,254	⋮	>
Daniel Pennington	Graduate Research Assistant	3/31/2025	5%	\$1,500	⋮	>
Zakariya Hudson	Graduate Research Assistant	3/31/2025	5%	\$1,500	⋮	>
Alia Cardenas	Graduate Research Assistant	3/31/2025	5%	\$1,500	⋮	>

Category July Total: \$\$\$\$



Demo

- Act-as landing page
- Selecting "People I support"
- Viewing report
- Drilling to details
- Adding notes



Features Being Added

- Instructions on the report & improved user experience
- PI completion status improvements
- eDoc link
- Better documentation, website, support

After October 15

- PIs can ask questions & request corrections on the transaction
- Much more... (including features based on feedback)



PIs


- Receive email notification the 15th of the month
- Review their expense report, one per month
- Submit questions or change requests as needed
- Mark the report “Reviewed” with one click

Note: “Reviewed” does *not* mean “Resolved”. The only requirement is that they *start* correction or inquiry.





Expense Review



PI Dashboard

PI Dash Guide Access Info Chat with us

Finances Personnel Transactions Expense Review Proposals

2 User Joe Doe

Expense Review

Selecting a month will display its data

July 2024

Sponsored Accounts Non Sponsored

Show F&A and Benefit Expenses (75) Show Expenses Under \$75 (45)

Mark Reviewed

July 2024

July Summary

At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga. At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga.

User - 10/31/2024 - 10:00:00
Saved

86708: GATES 2: Transition as a Novel Contraceptive Target >

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Salary and Wages

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Lillian Santana	Graduate Research Assistant	12/31/2024*	10%	\$2,354	>



Resources

**Quick Reference
Card**

ExpenseReview.research.cornell.edu/qrc-expensereview

Pilot Site

pidashboard-pilot.rais.cucloud.cornell.edu

Project Website

ExpenseReview.research.cornell.edu

Email Questions

er-project@cornell.edu





Questions?

