

Post Award Dashboard

Overview

The [Post Award Dashboard](#) displays grant expense and balance data in table and visual format. While this data is also available in Workday, this tool provides an alternative way to access this data for users who are not as familiar with Workday. The intended audience includes Principal Investigators (PI) and Grant Managers.

Instructions

- [Select your Filters](#)
- [Review Grant Expenses - Table Format](#)
- [Review Grant Expenses - Visual Format](#)
- [Review Balance Remaining - Table Format](#)
- [Review Balance Remaining - Visual Format](#)

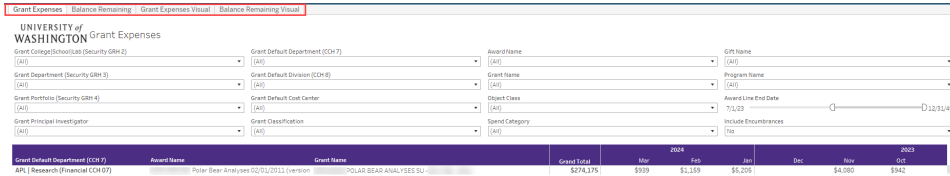
Select your Filters



Note

These filters will persist across views (Grant Expenses, Balance Remaining, Grant Expenses Visual, and Balance Remaining Visual), unless you change them.

1. Navigate to the [Post Award Dashboard](#) and select a view: Grant Expenses, Balance Remaining, Grant Expenses Visual, or Balance Remaining Visual.





2. Select filters, as applicable, to narrow your results. As a default, all filters are selected.



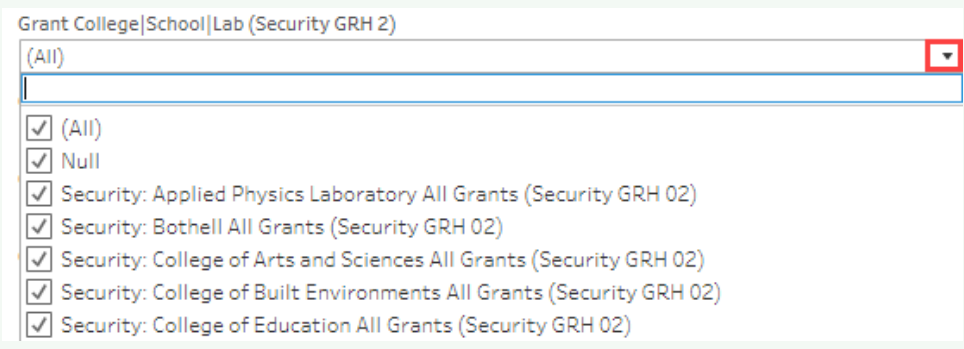
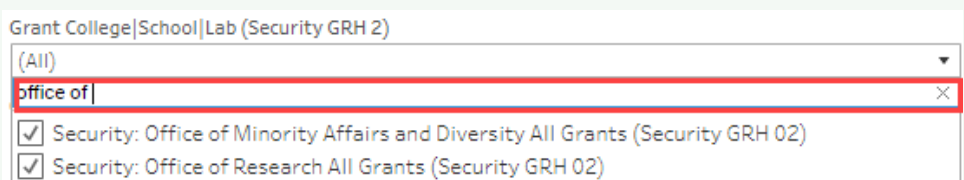
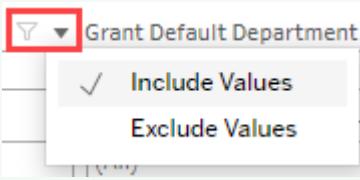

Note

Unless otherwise noted, the following filters apply to all four views: Grant Expenses, Balance Remaining, Grant Expenses Visual, and Balance Remaining Visual.

Filter	Description
Grant College School Lab (Security GRH 2)	Filter results by specific college(s), school(s), or lab(s) in the Grant Hierarchy.
Grant Department (Security GRH 3)	Filter results by specific department(s) in the Grant Hierarchy.
Grant Portfolio (Security GRH 4)	Filter results by specific grant portfolio(s) in the Grant Hierarchy.
Grant Principal Investigator	Filter results by specific PI.
Grant Default Department (CCH 7)	Filter results by specific department(s) in Cost Center Hierarchy, level 7.
Grant Default Division (CCH 8)	Filter results by specific division(s) in Cost Center Hierarchy, level 8.
Grant Default Cost Center	Filter results by specific cost center(s).
Grant Classification	Filter by broad grant categories, in Financial Grant Hierarchy, level 3.
Award Name	Filter results by specific award name(s).
Grant Name	Filter results by specific grant name(s).
Object Class	Filter results by specific object class(es).
Spend Category	Filter results by specific spend category(ies).
Gift Name	Filter results by specific gift name(s).

Program Name	Filter results by specific program name(s).
Award Line End Date	Filter results by award line end date.
Include Encumbrances	<p>Filter by one of the following:</p> <ul style="list-style-type: none"> • No Encumbrances • Include Encumbrances • Include Encumbrances and Pre-Encumbrances <div data-bbox="586 359 1484 472" style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;">  Note This displays on the Grant Expenses and Grant Expenses Visual tabs. </div>
Grant Filter Options	<p>Filter results by grants that are overexpended, or are approaching their end date with over 25% of the budget remaining.</p> <div data-bbox="586 579 1484 693" style="border: 1px solid #f0e68c; padding: 5px; margin-top: 10px;">  Note This displays on the Balance Remaining and Balance Remaining Visual tabs. </div>

 Tip - Filters



To...	Do this...
Display the available options for a filter...	<p>Click the dropdown arrow in the filter field:</p> 
Narrow the filter options...	<p>Type a key word(s) in the search box. The options that include this word will display:</p> 
Include or exclude specific values...	<p>Click the Showing All Values filter icon at the top of the field, then select to either Include Values or Exclude Values. By default, Include Values is selected.</p> 
Clear your filter selection(s) and restore the default value...	<p>Click the Click to Show All Values filter icon at the top of the field. This will clear your selections and return the data set t. If you made a selection in the field, this icon will display with a red x.</p> 

Review Grant Expenses - Table Format

Use this view to display grant expenses by month, beginning in July 2023, when data was loaded into Workday.

1. Display the **Grant Expenses** tab and select your filters. For more information, refer to the **Select your Filters** section at the top of this page.
2. Review the results that display.

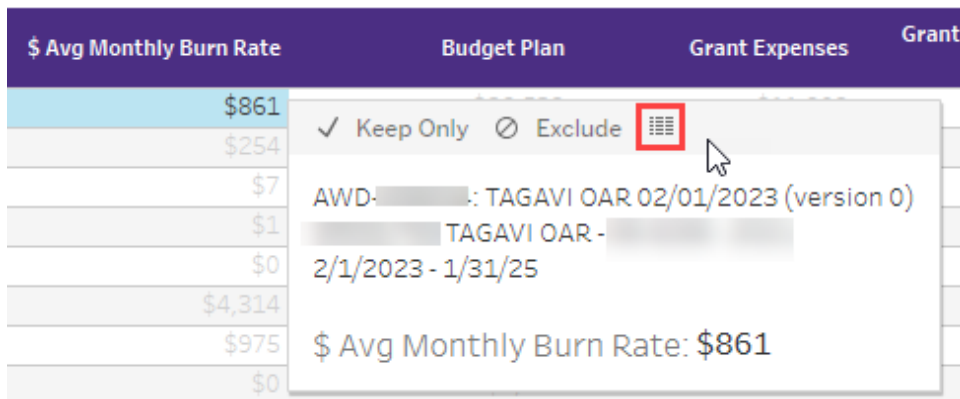
 **Tip - Adjust the Level of Detail in the Results**

To...	Do This...
Display more detail...	Hover over the columns in the results pane. If a plus (+) sign displays, click it to display additional columns to further breakdown the data. Repeat as desired to drill down to the applicable level of detail. 
Display less detail....	Hover over the columns in the results pane. If a minus (-) sign displays, click it to collapse the neighboring column. Repeat as desired to display the applicable level of detail. 

Column	Display (Default or Expanded)	Description
Grant Default Department (CCH 7)	Default	Displays the Grant Department associated with the grant.
Award Name	Default	Displays the Award Name associated with the grant.
Grant Name	Default	Displays the Grant Name, which includes the Grant Number.
Object Class	Expanded	Displays the applicable object classes for the grant. This column displays when you click the plus (+) sign in the Grant Name column.
Spend Category	Expanded	Displays the applicable spend categories, by object class for the grant. This column displays when you click the plus (+) sign in the Object Class column.
Journal Memo	Expanded	Displays the applicable journal memo, by spend category and object class for the grant. This column displays when you click the plus (+) sign in the Spend Category column.
Grant Total	Default	Displays the budget amount, minus debits and credits to date.
<Month Year>	Default	Displays the amount spent on the grant by month.

3. Drill into additional detail, if desired:

- a. Click on a value in the results table and click the **View Data** icon to display additional detail for a specific month.



The View Data Sheet displays.

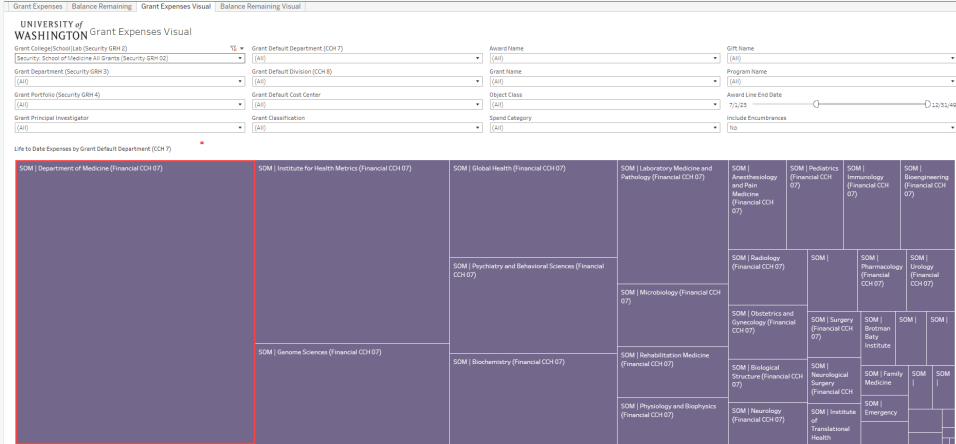
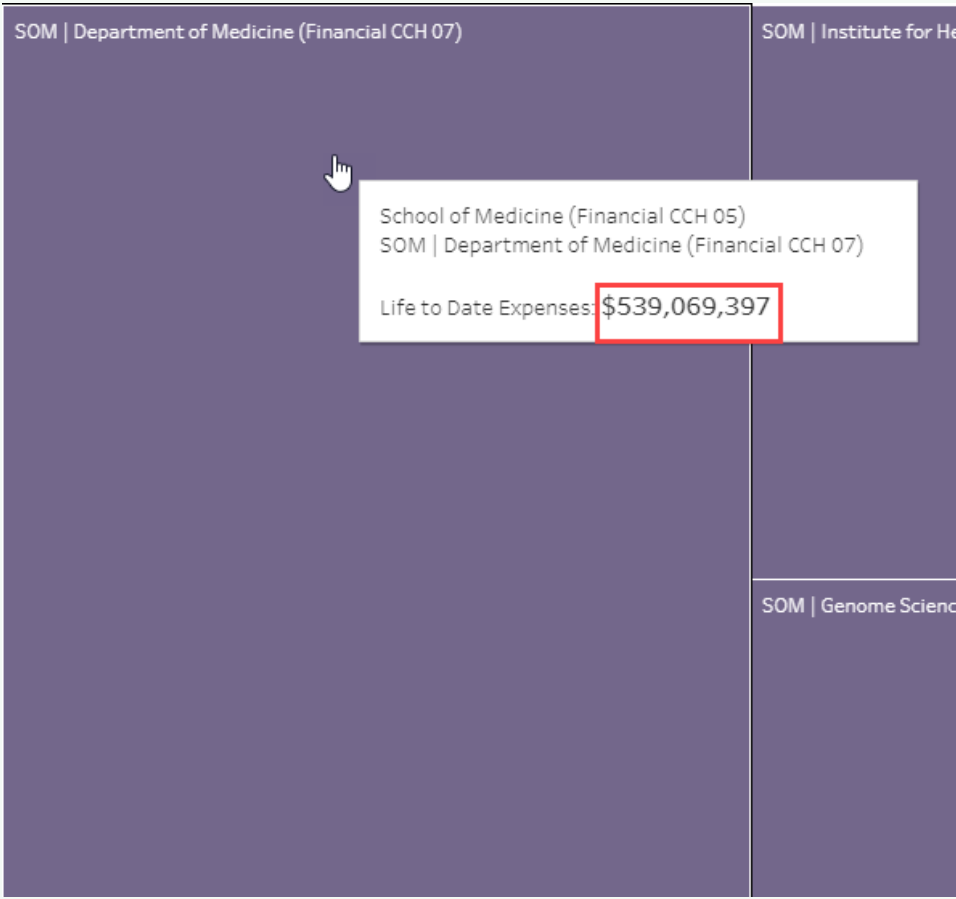
- b. Select the **Journal Data** tab to view specific transactions for the month.
- c. Click **Show Fields** to add/remove columns of data.
- d. Click **Download** (upper right corner of the window) to export results to Excel.

Review Grant Expenses - Visual Format

Use this view to display life-to-date grant expenses represented in visual format, by Grant Default Department (CCH 07). From this view, you can click on different graphical elements to drill into additional detail, if desired.

1. Display the **Grant Expenses Visual** tab and select your filters. For more information, refer to the **Select your Filters** section at the top of this page.
2. Review the results that display.

 Tip - Understanding the Visual

To...	Do This...
Understand how a department's grant expenses compare to other departments.	<p>Look at the size of the squares in the visual. The larger the square, the higher the life-to-date grant expenses for the department. For example, in the following screenshot, the visual indicates that SOM Department of Medicine has higher grant expenses than other departments.</p> 
View the total grant expenses for a department.	<p>Hover over the box for a department. The total amount of grant expenses for the department displays in Amount field of the popup.</p> 

3. Drill into additional detail, if desired:

- a. Click on a box in the results visual and click the **View Data** icon to display additional detail for a specific department.

The screenshot shows a table with columns: '\$ Avg Monthly Burn Rate', 'Budget Plan', 'Grant Expenses', and 'Grant'. The first row has a value of '\$861'. A popup menu is open over the first row, containing options: 'Keep Only', 'Exclude', and a 'View Data' icon (a grid with a plus sign). The popup also displays text: 'AWD- [redacted]: TAGAVI OAR 02/01/2023 (version 0)', '[redacted] TAGAVI OAR - [redacted]', '2/1/2023 - 1/31/25', and '\$ Avg Monthly Burn Rate: \$861'.

The View Data Sheet displays.

- b. Select the **Journal Data** tab to view specific transactions for the month.
- c. Click **Show Fields** to add/remove columns of data.
- d. Click **Download** (upper right corner of the window) to export results to Excel.

Review Balance Remaining - Table Format

Use this view to display the current status of a grant.

1. Display the **Balance Remaining** tab and select your filters. For more information, refer to the **Select your Filters** section at the top of this page.
2. Review the results that display.

Tip - Adjust the Level of Detail in the Results

To...	Do This...
Display more detail...	Hover over the columns in the results pane. If a plus (+) sign displays, click it to display additional columns to further breakdown the data. Repeat as desired to drill down to the applicable level of detail. Award Name AWD- [redacted]: Contrast-Enhanced Ultr 08/31/2023 (version 0)
Display less detail....	Hover over the columns in the results pane. If a minus (-) sign displays, click it to collapse the neighboring column. Repeat as desired to display the applicable level of detail. Award Name AWD- [redacted]: Contrast-Enhanced Ultr 08/31/2023 (version 0)

Column	Default or Expanded View	Description
Grant Default Department (CCH 7)	Default	Displays the Grant Department associated with the grant.
Grant Principal Investigator	Default	Displays the PI associated with the grant.

Award Name	Default	Displays the Award Name associated with the grant.
Grant Name	Default	Displays the Grant Name, which includes the Grant Number.
Object Class	Expanded	Displays the applicable object classes for the grant. This column displays when you click the plus (+) sign in the Grant Name column.
Max. Award Line End Date	Default	Displays the end date of the grant.
Max. Days Until End Date	Default	Displays the maximum number of days remaining until the end of the grant.
Projected Burn Days	Default	Displays the estimated number of days remaining on the grant, based on the \$ Remaining before Encumbrance & Pre-Encumbrance and \$ Avg Monthly Burn Rate values.
\$ Avg Monthly Burn Rate	Default	Displays the average amount spent per month on the grant.
Budget Plan	Default	Displays the total budgeted amount for the grant.
Grant Expenses	Default	Displays the total expenses (debits/credit) incurred for the grant to date.
Grant Program Income Revenue	Default	Displays the total income revenue generated because of the grant.
\$ Remaining before Encumbrance & Pre-Encumbrance	Default	Displays the remaining balance of the grant, without encumbrances or pre-encumbrances.
% Remaining before Encumbrance & Pre-Encumbrance	Default	Displays the percentage of the budgeted amount remaining, without encumbrances or pre-encumbrances
Encumbrance	Default	Displays an outstanding commitment on the budget. An encumbrance places a hold by deducting the amount encumbered from the budget balance until the item has been paid (vendor invoice processed through Accounts Payable and posted).
Pre-Encumbrance	Default	Displays an amount that may become an encumbrance. For more information, refer to Commitment .
\$ Remaining after Encumbrance & Pre-Encumbrance	Default	Displays the remaining balance of the grant, including encumbrances and pre-encumbrances.
% Remaining after Encumbrance & Pre-Encumbrance	Default	Displays the percentage of the budgeted amount remaining, including encumbrances and pre-encumbrances.

3. Drill into additional detail, if desired:

- a. Click on a value in the results table and click the **View Data** icon to display additional detail for a specific month.

The screenshot shows a table with columns: \$ Avg Monthly Burn Rate, Budget Plan, Grant Expenses, and Grant. The \$ Avg Monthly Burn Rate column has values: \$861, \$254, \$7, \$1, \$0, \$4,314, \$975, and \$0. A popup menu is open over the \$861 value, showing options: 'Keep Only' (checked), 'Exclude', and a 'View Data' icon (a grid of lines). The popup content includes: 'AWD: [redacted]: TAGAVI OAR 02/01/2023 (version 0)', '[redacted] TAGAVI OAR - [redacted]', '2/1/2023 - 1/31/25', and '\$ Avg Monthly Burn Rate: \$861'.

The View Data Sheet displays.

- b. Click through the tabs on the left to view data at the Grant or Journal Data level.



Note

To drill down into specific transactions, select the **Journal Data** tab.

c. Click **Show Fields** to add/remove columns of data.

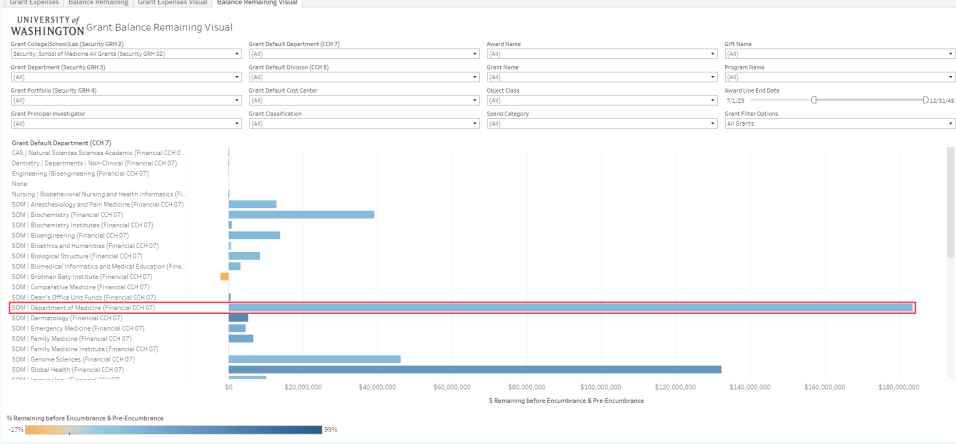
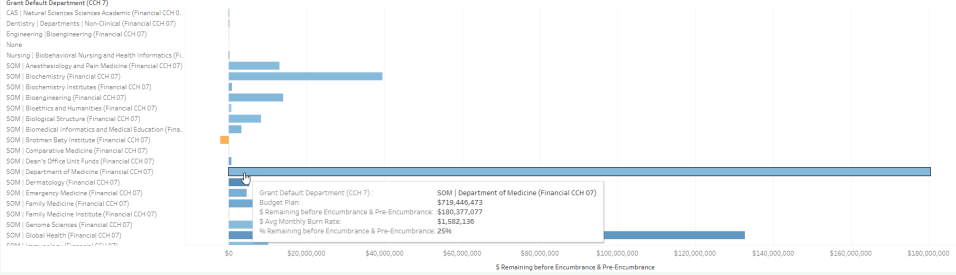
d. Click **Download** (upper right corner of the window) to export results to Excel.

Review Balance Remaining - Visual Format

Use this view to display balance remaining represented in visual format, by Grant Department From this view, you can click on different graphical elements to drill into additional detail, if desired.

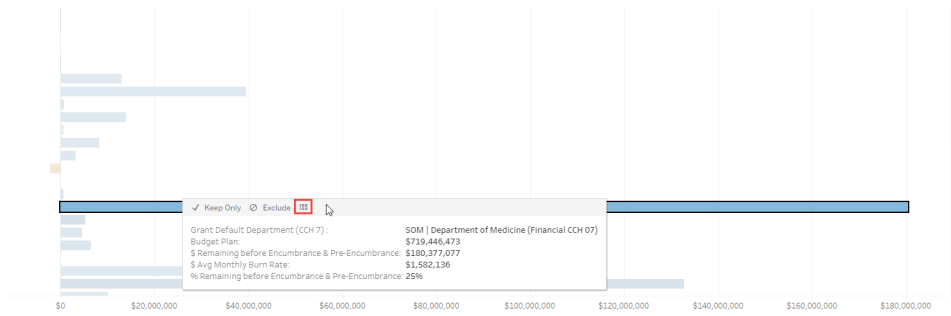
1. Display the **Balance Remaining Visual** tab and select your filters. For more information, refer to the **Select your Filters** section at the top of this page.
2. Review the results that display.

Tip - Understanding the Visual

To...	Do This...
<p>Understand how a department's remaining grant balance compares to other departments.</p>	<p>Look at the size of the bar in the bar graph. The longer the bar, the higher the remaining balance for the department.</p> <p>For example, in the following screenshot, the visual indicates that SOM Department of Medicine has large remaining balance</p> 
<p>View additional detail, by department.</p>	<p>Hover over the bar for a department to display the following summary information:</p> <ul style="list-style-type: none"> • Budget Plan • \$ Remaining before Encumbrance & Pre-Encumbrance • \$ Average Monthly Burn Rate • % Remaining before Encumbrance & Pre-Encumbrance 

3. Drill into additional detail, if desired:

a. Click on a bar in the results visual and click the **View Data** icon to display additional detail for a specific department.



The View Data Sheet displays.

- b. Click through the tabs on the left to view data at the Grant or Journal Data level.



Note

- To drill down into specific grants for the department, select the **Grant** tab.
- To drill down into specific transactions, select the **Journal Data** tab.

- c. Click **Show Fields** to add/remove columns of data.

- d. Click **Download** (upper right corner of the window) to export results to Excel.