



Louisiana Tech University  
Office of Sponsored Projects

## **Grant Spending Dashboard Manual**



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## 1. Introduction

The Grant Spending Dashboard is tailor-made for PIs as an easy and simple use tool, and an alternative to viewing their spending data from Workday, while increasing the visibility of their grants. The design started on 4/21/2023 and is ready to roll out by the end of October 2023.

The Dashboard is emphasized and implemented in the self-service-driven interface principle, with limited service rendered. The access control follows Workday role assignments, which are accessible to all PIs, Co-PIs, and full-time administrators (Grant Financial Analysts).

The Dashboard's data is refreshed weekly, and contains data of the grants with expiration date of minimum last fiscal year.

The home page provides an overview of terms and definitions related to the basic award structure, and the portal for Award and Grant ID lookup and Spend Category lookup. The Budget data information is categorized into panels on the dashboard in different functional pages that follow. PI's can monitor their budget spending KPI's, export reports, and glance at the forecasting estimates at the end of budget period to make data-driven decisions.

### How do you log into the dashboard?

Users should use their Microsoft Office login to access the Dashboard.

User ID: abcde

Dashboard login user ID: [abcde@office.latech.edu](mailto:abcde@office.latech.edu)

Password: [User Microsoft Office password]

### What can you do with the dashboard?

- Review the award budget and the spending summary by Award and Grant level.
- Populate Award Billed to date information.
- Summarize actual spending by the filtered categories in combination, with a time-sensitive period selection line.
- Forecast the total spending by the end of the budget period based on the current spending trend in a linear projection.
- Export data, table, and page in Excel table or PDF format.

## **What should I do if I miss a few transactions on the dashboard?**

Don't worry, the data in the dashboard refreshes every week from the workday. If your transaction is past 1 week or you can't find the transaction even on your workday, please email to [OSPAutomation@office.latech.edu](mailto:OSPAutomation@office.latech.edu) for validation.

## **How to reach out to the Dashboard team for support?**

Please email your queries to [OSPAutomation@office.latech.edu](mailto:OSPAutomation@office.latech.edu) or you can visit the OSP office.

**We hope you enjoy using this tool. The dashboard has been thoughtfully designed to cater a self-service purpose, providing an intuitive and user-friendly experience.**

**Walkthrough video and some short videos have been posted on OSP's Website to answer your following questions as well.**

- How can I get the cumulative spending by award and grant level in a select period? How to export the data by Excel?
- Where can I see my award budget summary and the award billed-to-date information?
- Do I spend too slow or too fast? Will I zero out the budget if I keep the current spending rate?

**Please visit the OSP website for more information: [Link](#)**

## 2. Home Page of the Dashboard

The screenshot shows the Grant Spending Dashboard interface. At the top is a dark blue header with the Louisiana Tech University logo on the left, the title "Grant Spending Dashboard" in the center, and a "Help" button on the right. Below the header, the main content area is divided into two columns. The left column contains four informational boxes: "Award ID" (explaining the AWD-3XXXXXX format), "Grant ID" (explaining the GR3XXXX format), "Budget" (describing cost types and approval), and "Balance and Spent" (describing budget categories: Actual, Pre-encumbrance, and Encumbrance). Below these are two lookup boxes: "AwardID and Grant ID Lookup" (annotated with a yellow circle and the number 1) and "Spend Category Lookup" (annotated with a yellow circle and the number 2). The right column features a hierarchical tree diagram showing the relationship between Awards, Grants, Budget, and Balance and Spent, leading to Ledger Accounts. A yellow callout bubble points to a red button labeled "View My Awards" with a right arrow, with the text "Click Here to go to Awards Page" inside the bubble.

**Award ID**, a format of AWD-3XXXXXX, is used to identify all aspects of an awarded research project, including the Sponsor, funding type, project duration, awarded amounts, budgeted amounts, and key personnel. It could contain individual Grant IDs to properly track Period of Performance, Participant Support, or Subaward spending.

**Grant ID**, a format of GR3XXXX, identifies the unique grant or contract financial worktag specific to one Award Line. The Grant ID is associated with work tag for all financial/expenditures transactions in Workday.

**Budget** identifies the type of costs and estimated amounts needed to complete the project. The budget must be approved by the funding agency and Louisiana Tech. This budget will be the basis for authorizing any expenditures on the project and the basis for seeking payment from the funding agency.

**Balance and Spent** contains three categories of spent or allocated budget:

- **Actual** means the goods or services have been obtained, and vendors have been paid. It is counted as spending/expenditures, and ready to get reimbursable from the sponsors for cost-reimbursable awards.
- **Pre-encumbrance** is a request to reserve budget funds for planned expenditures. The funds have been requested, but have not yet been approved for a purchase order. Example is the spend authorization, or a plan to replace a car, but the purchase has not yet been initiated.
- **Encumbrance** is a means of reserving funds to cover future anticipated expenditures. Salaries, and wages tied by ARFs are the examples, committing such obligated amounts for liquidation. Encumbrance allows for a more accurate picture of funds remaining on budget lines.

**Ledger Accounts** are a financial code that Spend Categories roll up to for reporting purposes. These codes are found on the Award Budgetary Balance Report used to view the Award Budgets, Actuals, Encumbrances, and Remaining Balances.

**AwardID and Grant ID Lookup**

All

**Spend Category Lookup**

All

**View My Awards** →

Click Here to go to Awards Page

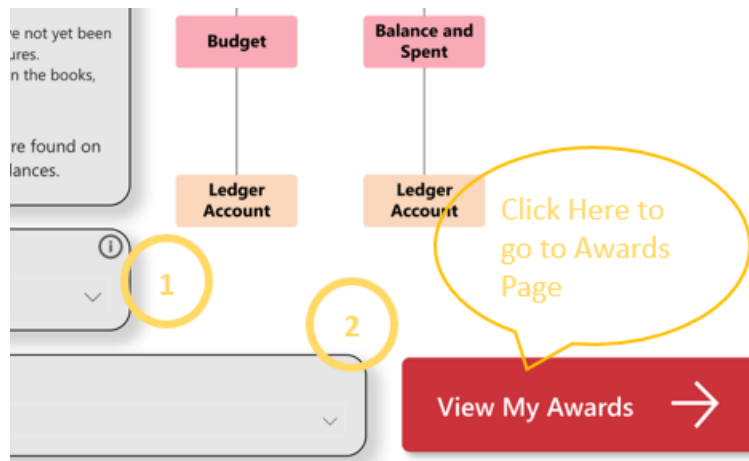
Functions Description	
1	Award ID and Grant ID Lookup
2	Spend Category Lookup

## Home Page Functions Description

1. Award ID and Grant ID Lookup  
Displays all Awards and Grants (sub-awards) assigned under you (with an end date no longer than the beginning of the current fiscal year). This lookup tool supports a directory to fetch Award ID and Grant ID for quick references (form submissions). Any selections made will not be reflected on other pages.
2. Spend Category Lookup  
Displays most common spend categories under the accounts. OSP will be updating more categories under each account (Extending knowledge to PIs to bill new technology subscriptions (Cloud), and other resources.)

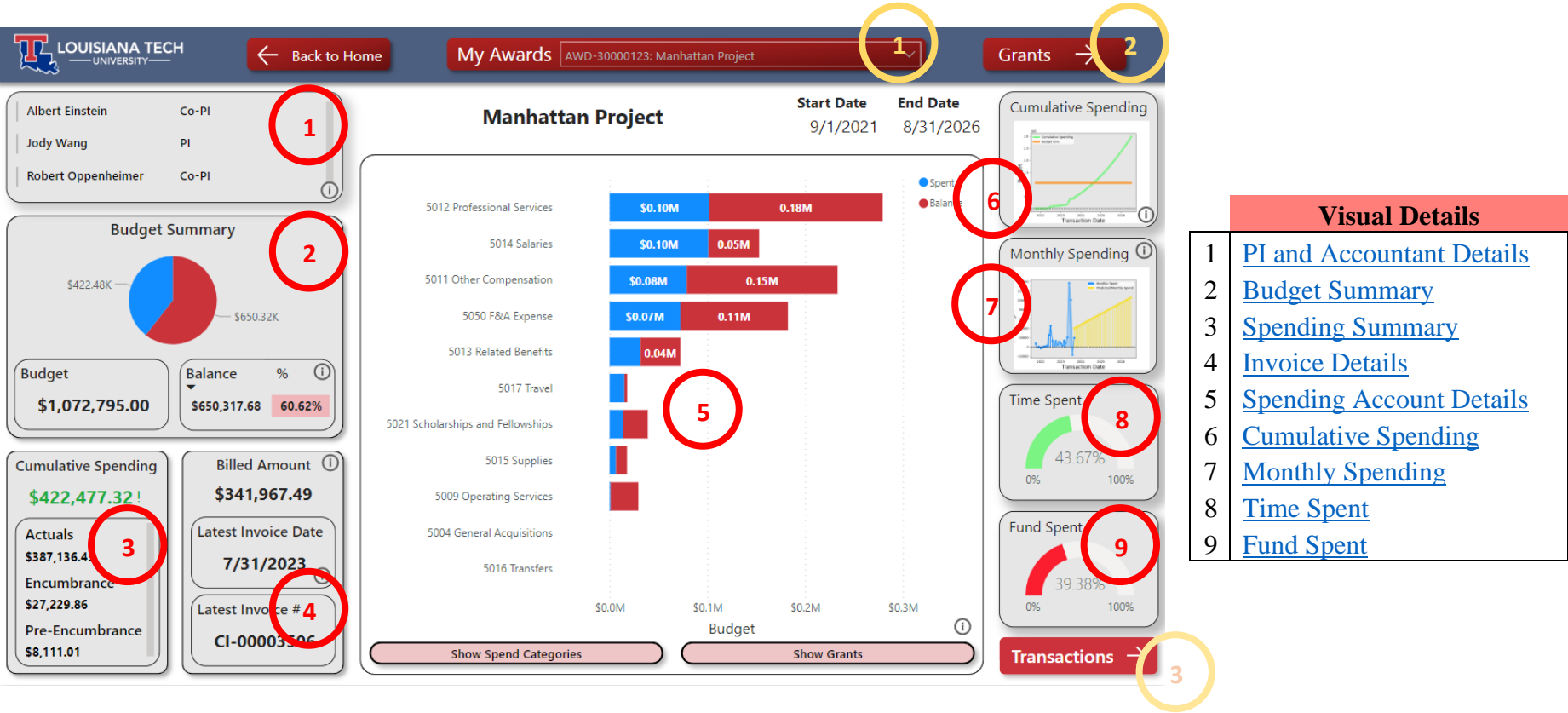
## Home Page of the Dashboard

The Home Page or the starting page of the dashboard contains brief information on terms, definitions, and the basic award structure.



**Click on View My Award at the bottom to visit your Awards.**

3. Awards Page

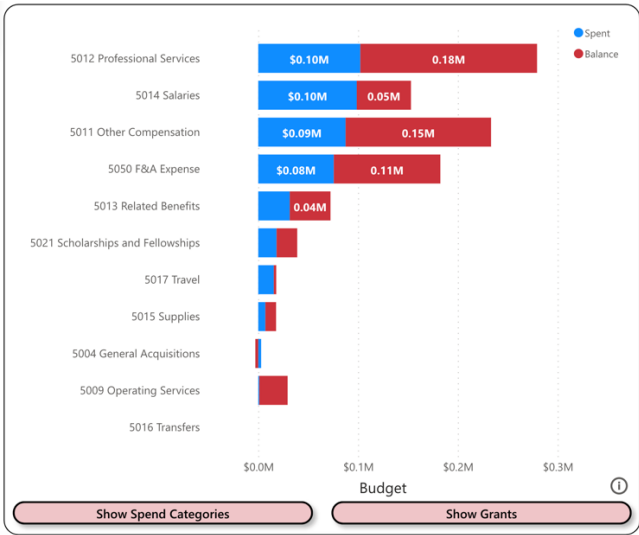


Page Functions	
1	<a href="#">Awards Dropdown</a>
2	<a href="#">Grants Navigation Button</a>
3	<a href="#">Transactions Navigation Button</a>

Awards Page Visual Descriptions

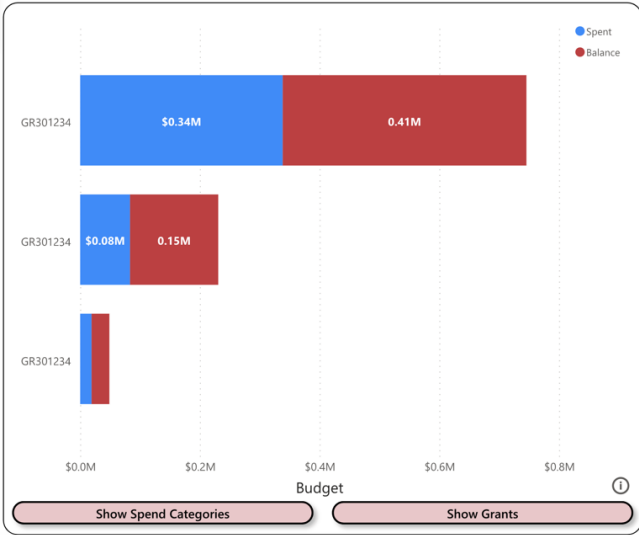
- 1. PI and Accountant Details  
Displays information about PIs and the assigned financial analysts.
- 2. Budget Summary  
Displays information about the budget and balance for the selected award.
- 5. Spending Account Details

Choosing *Show Spend Categories* displays information about the budget/balance per spend category for the selected award. Hover your cursor on the bars to view more information.



- 3. Spending Summary  
Displays information about the spending for the selected award.
- 4. Invoice Details  
Displays information about the recent invoice for the selected award.

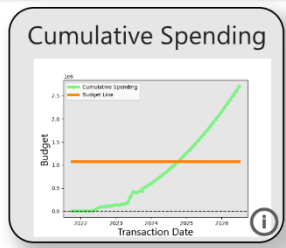
Choosing *Show Grants* displays each sub-award for the selected award. Hover your cursor on the bars to view more information.





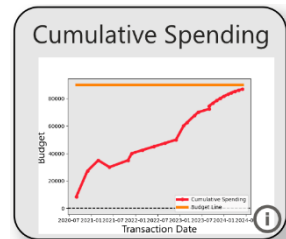
## 6. Cumulative Spending

Forecasts the total budget spent by the end of the award, based on current spending trends.



The orange line indicates the budget of the Award.

The green curve in the visual intersects the budget line forecasting the successful utilization of the complete budget allocated. We developed this using machine learning as a health indicator of the project.

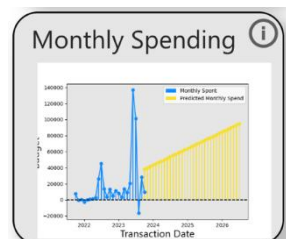


The red curve in this visual forecasting improper utilization of the budget allocated (The forecasted budget curve does not intersect the budget line).

(Few Transactions within the respective Award might give incorrect conclusions. The Model implemented trains constantly with every new transaction.)

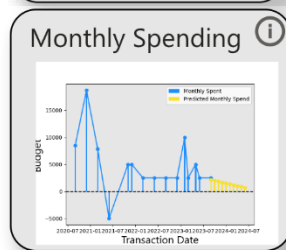
## 7. Monthly Spending

Forecasts the average monthly spending trend until the end of the award, based on the current spending trend.



The blue plot in the visual indicates the current monthly spending from the visual, and the yellow plot indicates projected monthly spending for the remaining period.

We can see a linearly projected monthly spending indicating consistency.



We can observe a decreased spending projection towards the end of the project

(Few Transactions within the respective Award might give incorrect conclusions. The Model implemented trains constantly with every new transaction.)

### 8. Time Spent

This gauge visual indicates the percentage of time elapsed for the award. (health indicator)

(Time Spent may have increased value in case of extensions.)

### 9. Fund Spent

This gauge visual indicates the percentage of budget spent for the award. (health indicator)

## Awards Page Functions Description

### 1. Awards Dropdown

Displays the awards assigned to you. Upon selection of an award, details populate each page.



### 2. Grants Navigation Button

Navigate to the *Grants* page which displays the sub-awards and their details.



### 3. Transactions Navigation Button

Navigate to the *Transactions* page which contains detailed information by transactions of the spending on the respective award.



(The clear information on the Transactions page is presented as Chapter 5 in this manual) [Click here to learn more about Transactions](#)

4. Grants Page

LOUISIANA TECH UNIVERSITY

← Back to Awards

1

Grants

GR301231: Los Alamos Property Development

2

Albert Einstein

Co-PI

Jody Wang

PI

Robert Oppenheimer

Co-PI

Budget

\$745,465.00

Cumulative Spending

\$320,241.62

Balance

\$425,223.38

57.04%

Actuals

\$284,900.75

Encumbrance

\$27,229.86

Pre-Encumbrance

\$8,111.01

Budget Summary

Spent \$320.24K

Balance \$425.22K

Los Alamos Property Development

Start Date 8/1/2021

End Date 9/30/2026

5014 Salaries

\$0.10M

0.05M

5011 Other Compensation

\$0.08M

0.15M

5050 F&A Expense

\$0.07M

0.11M

5013 Related Benefits

\$0.04M

5017 Travel

5021 Scholarships and Fellowships

5015 Supplies

5009 Operating Services

5004 General Acquisitions

5016 Transfers

Cumulative Spending

5

Monthly Spending

6

Time Spent

7

Fund Spent

8

Transactions

→

3

Visual Description

1

[PI and Accountant Details](#)

2

[Budget Summary](#)

3

[Spending Summary](#)

4

[Spending Account Details](#)

5

[Cumulative Spending](#)

6

[Monthly Spending](#)

7

[Time Spent](#)

8

[Fund Spent](#)

Functions Description

1

[Awards Navigation Button](#)

2

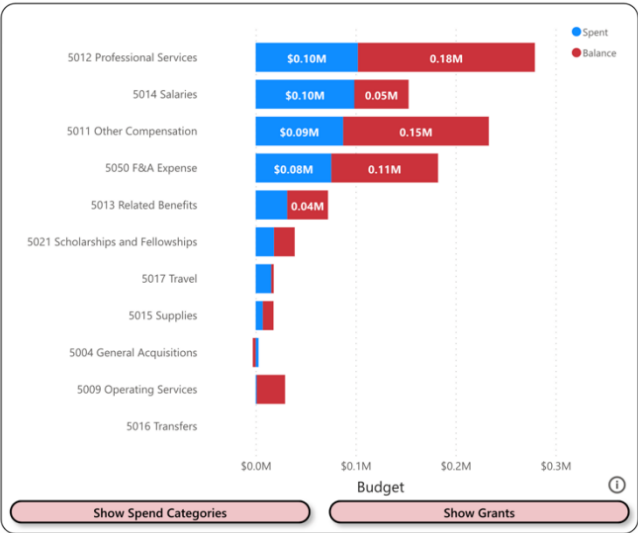
[Grants Dropdown](#)

3

[Transactions Navigation Button](#)

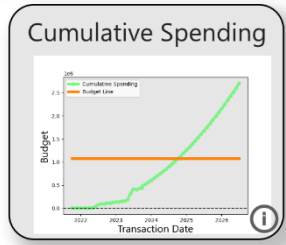
Grants Page Visuals Description

- 1. PI and Accountant Details  
Displays information about PIs, Accountants, and Financial Analysts assigned to the grant.
- 2. Budget Summary  
Displays information about the budget and balance for the selected grant.
- 3. Spending Summary  
Displays information about the spending for the selected grant.
- 4. Spending Account Details  
Displays information about the budget/balance per spend category for the selected grant.



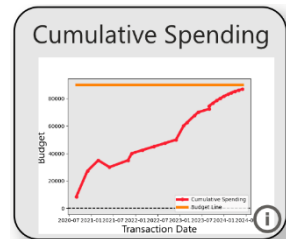
## 5. Cumulative Spending

Forecasts the total budget spent by the end of the grant, based on current spending trends.



The orange line indicates the budget of the Grant.

The green curve in the visual intersects the budget line forecasting the successful utilization of the complete budget allocated. We developed this using machine learning as a health indicator of the project

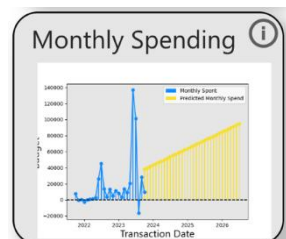


The red curve in this visual forecasting improper utilization of the budget allocated (The forecasted budget curve does not intersect the budget line).

(Few Transactions within the respective Grant might give incorrect conclusions. The Model implemented trains constantly with every new transaction.)

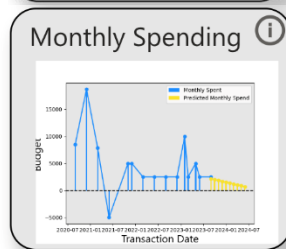
## 6. Monthly Spending

Forecasts the average monthly spending until the end of the grant, based on current spending trends.



The blue plot in the visual indicates the current monthly spending from the visual, and the yellow plot indicates projected monthly spending for the remaining period.

We can see a linearly projected monthly spending indicating consistency.



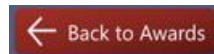
We can observe a decreased spending projection towards the end of the project

(Few Transactions within the respective Award might give incorrect conclusions. The Model implemented trains constantly with every new transaction.)

7. Fund Spent  
Displays the percentage of the budget spent for the grant.

## Functions Page Descriptions

1. Awards Navigation Button  
Navigate back to the *Awards* page.



2. Grants Dropdown  
Displays the sub-awards for the award selected on the *Awards* page. Upon selection of a grant, details populate the page.



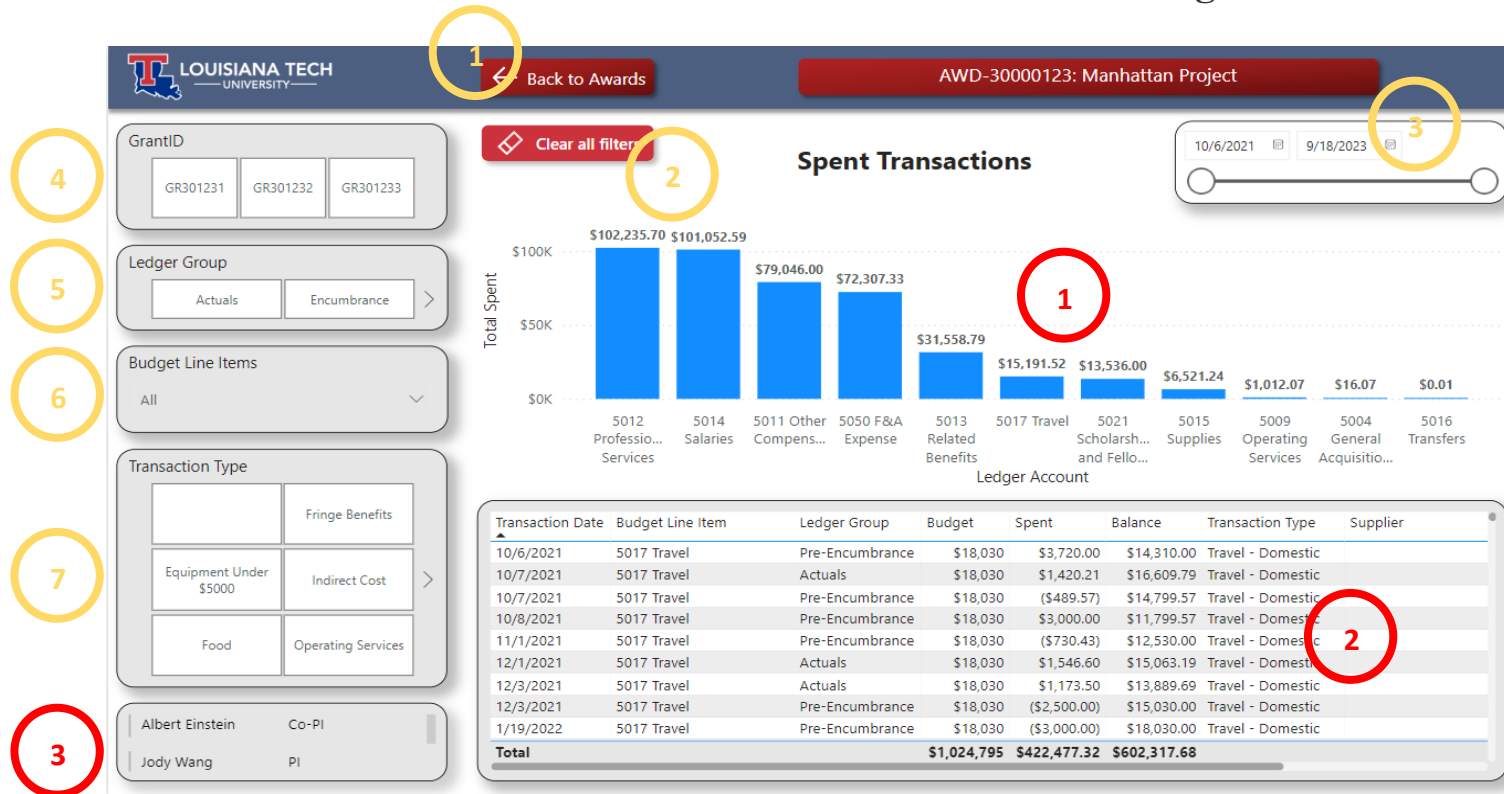
Click to open the Grants dropdown

3. Transactions Navigation Button  
Navigate to the *Transactions* page.



(The clear information on the Transactions page is presented as Chapter 5 in this manual) [Click here to learn more about Transactions](#)

## 4. Transactions Page



Visual Description	
1	<a href="#">Ledger Account Spending</a>
2	<a href="#">Transactions Table</a>
3	<a href="#">PI and Accountants Details</a>

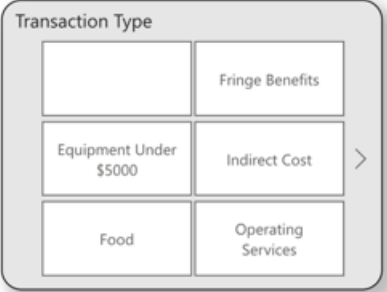






Functions Description	
1	<a href="#">Awards Navigation Button</a>
2	<a href="#">Clear All Filters Button</a>
3	<a href="#">Transaction Date Filter</a>
4	<a href="#">Grant ID Selection Buttons</a>
5	<a href="#">Ledger Selection Buttons</a>
6	<a href="#">Spend Categories Dropdown</a>
7	<a href="#">Transaction Type Selection Buttons</a>

## Transactions Page Details Description

1. **Ledger Account Spending**  
Displays the total budget spent on different accounts.
2. **Transactions Table**  
Displays Transactions made on the budget with the filtered categories.
3. **PI and Accountants Details**  
Displays information about PIs, Accountants, and Financial Analysts assigned to the award.



Transactions Page Functions Description



1. Awards Navigation Button  
Navigate back to the *Awards* page.

2. Clear All Filters Button  
Clears all selections made to the filters on the Transactions page.

3. Transaction Date Filter  
Filters all transactions by the date period selected.

4. Grant ID Selection Buttons  
Filters all transactions by the grants selected.

5. Ledger Selection Buttons  
Filters all transactions by the ledger selected. (Actuals, Encumbrance, Pre-Encumbrance)

6. Spend Categories Dropdown  
Filters all transactions by the spend categories selected.

7. Transaction Type Selection Buttons  
Filters all transactions by the transaction type selected.