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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
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 for validation.

How to reach out to the Dashboard team for support?

Please email your queries to 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

### Functions Description

1. Award ID and Grant ID Lookup
2. Spend Category Lookup

Click Here to go to Awards Page

View My Awards
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

Visual Details
1. PI and Accountant Details
2. Budget Summary
3. Spending Summary
4. Invoice Details
5. Spending Account Details
6. Cumulative Spending
7. Monthly Spending
8. Time Spent
9. Fund Spent

Page Functions
1. Awards Dropdown
2. Grants Navigation Button
3. Transactions Navigation Button
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.

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.

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.

   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.

   Click to open the awards dropdown

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

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.

![Cumulative Spending](image)

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.

![Monthly Spending](image)

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.

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. Ledger Account Spending
2. Transactions Table
3. PI and Accountants Details

**Functions Description**
1. Awards Navigation Button
2. Clear All Filters Button
3. Transaction Date Filter
4. Grant ID Selection Buttons
5. Ledger Selection Buttons
6. Spend Categories Dropdown
7. Transaction Type Selection Buttons
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.