UDW+ Grants Management Dashboard Quick Start Guide

Version 1.5

Program Services Office & Decision Support Group
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Access

2. Complete one or more Access Courses in NYUiLearn (via NYU Home, Work tab).
   - FIN 802: UDW+ Access to D02. Comparative Analysis & D04. UDW+ Financial Indicators Dashboard Quiz
   - FIN 803 PI: UDW+ Access to D03. Grants Management Dashboard for PI’s Quiz
   - FIN 803 DA: UDW+ Access to D03. Grants Management Dashboard for DA’s Quiz
   - FIN 804: UDW+ Access to All Dashboards and Standard Reports Quiz
3. Upon passing a quiz, you will be granted access within 3 business days. You will receive a confirmation email containing important system requirements and helpful links.

Log in/System Requirements

UDW+ is an application that runs in a browser window. It is PC and Mac compatible. You should have received an email from no.reply-soaprod@nyu.edu with the recommended system settings outlined below.

1. **The UDW+ Client** is the recommended browser to use with UDW+. You can download the UDW+ client, by going to NYU Home → Work tab → Administrative Systems → UDW+ Download. This will direct you to the Decision Support Group homepage. Under Log in to UDW+, choose the download for PC or Mac. After the installation is completed, the UDW+ Icon will be located on your desktop.
2. **Adobe Flash version 10.3 or higher** is required to view graphs and scorecards in UDW+.
3. **Adobe Reader version 7.0 or higher** is required for viewing PDF reports generated in UDW+.
4. **VPN** (Connecting to the VPN is required if you are working outside of the NYU network).

Additional information is available under Dashboards → UDW+ Help → UDW+ Knowledgebase Articles → UDW+ System Requirements.

Data Refresh

UDW+ is refreshed overnight, every night. The refresh time and date will appear at the top of each dashboard or report in the header section as shown in the example below.
00. FAME Chartfield Security Report

Purpose: Check your current Financials and Salary Expense chartfield security.

1. Click on the drop-down for Netid. Click on More/Search…
2. Type in your net id and click “Search”. Highlight it so it turns blue, and then click OK.
3. Click Apply to run the report.

Chartfield Access

Chartfield security determines results. Any monetary amounts that are displayed will be restricted by your chartfield security. For example, a purchase order may be issued for multiple chartfields. If you are viewing a purchase order that contains chartfields outside of your authorized access, you will not see all of the lines that contribute to the total purchase order amount.

Need to modify your Chartfield Access? Go to NYU Home→ Work tab→ Administrative Systems→ Chartfield Access Authorization Form. Contact FinanceLink at askfinancelink@nyu.edu or 212-998-1111 for assistance.
PI Summary page

The PI Summary page answers the questions of “How much money is left on my projects?”. This page will automatically update to display inception-to-date financial information for all of your active projects. If needed, you may limit the displayed grants using the available prompts. You may also view financial information for ‘Other Fund Sources’ (such as faculty start-up funds and gifts).

The following information is displayed for your grants:

- **Sponsor**
- **Award #**
- **Project**: You may drill to view additional details, such as ‘Everyone Paid From This Grant’.
- **Cost Share**: if the column contains a “Y”, you may drill to view the Cost Share obligations from the dept.
- **PI**: Primary PI
- **Project Start Date** and **Project End Date**
- **Total Award Amount**: by grant year from the sponsoring agency (including monies not yet received for future grant years). You may drill to see the expected budget to be received by Grant Year.
- **Total Authorized Budget**: the dollars that have been received and can be spent against. You may drill to see all the expense budgets.
- **Committed Dollars**: the sum of expenses, encumbrances, pending, and total projected indirect cost. You may drill to see a detailed report. **Important note**: Committed Dollars does NOT include salaries beyond current fiscal.
- **Exception Amount**: transactions that have failed due to an insufficient remaining balance.
- **Remaining Balance**: the Total Authorized Budget minus Committed Dollars minus Exceptions.
- **% of Budget Remaining**
- **Low Budget indicator**: quickly determine which grants have a low remaining balance.

The following tables are available on the bottom of the PI Summary page:

- **Flagged Projects**: projects at Risk (grants authorized by the University to start spending money
although funding from the sponsor may have not yet been received). Or projects that are **Underspending** (grant has 30% or more of budget remaining with less than 6 months left on grant).

- **Projects Coming to an End**: contains projects that have 6 months (180 days) or less remaining.
- **When Are My Reports Due**: displays reports that are due within 120 days (such as progress or financial reports).

**Expense Breakdown page**

The Expense Breakdown page profiles expenses for a specific project.

This page includes basic demographics and project attributes such as the Sponsor, primary PI, Project Team members, Award #, Current Overhead Rate, and more. As well as a graphical representation of inception-to-date amounts for payment received, total direct, total indirect costs and total expenses (sum of direct and indirect costs).

The table at the bottom of the page contains financial information grouped by expense accounts such as Personnel Expense, Other Than Personnel Expense (OTPS) and Indirect Cost.

**Grant Budget Detail page**

The Grants Budget Detail page shows financial information for a project viewable in Fiscal Year, Grant Year, or Calendar Year.

The graph displays Authorized Budget (monies received in a certain grant year) versus Committed Dollars (expenses and costs).

The table groups financial information based on the time selected. You may drill on amounts for additional information.

**Alerts page**

The Alerts page displays projects that require your attention (such as Projects with Exceptions, Underspending Projects, Projects in Risk, and/or Projects with Low Budget).
Drilling for additional details

Links are indicated by blue text. These links allow you to drill down into the report for more detail or navigate to a related report.
1. Click on a **blue link** to drill down.
2. A menu of options or action links will display. These options change depending on the report element selected and your access.
3. Select the **detail** that you wish to view.
4. The link will open in a separate window. To return to the prior report, use the “Return” link (if available), or close the newly created browser window.

Printing and Exporting

Print the entire dashboard page
1. Printing from the Page Options menu will print the entire dashboard as displayed on your screen. On the upper right hand corner of the screen, there is a three line icon that is the "Page Options" menu.
2. From this menu, select to **Print**.
3. Print format options include either in **Printable PDF** (requires Adobe Acrobat plug-in) or **HTML**.

Print or Export an individual report or graph
1. Beneath a report or graph, there is a link to "Print" or “Export”.
2. Print format options include either in **Printable PDF** (requires Adobe Acrobat plug-in) or **HTML**.
3. Export options include **PDF**, **Excel**, **PowerPoint 2003** or **2007**, **Web Archive** or **Data (CSV Format or Tab delimited Format)**.

Who to contact for Help?

“About this Dashboard”  

Below the title of each dashboard, there are two links that provide access to the metadata for each dashboard page including useful information, key definitions, and use notes.

The **Decision Support Group** (DSG) is here to help! Email: **askDSG@nyu.edu** or Phone: 8-2900  
More in-depth training is also available on NYU **iLearn**. Search for course **FIN 800: UDW+ Dashboards**  
**Online Training** and select **Grants Management Dashboard (for PI)**.