



# UDW+ Grants Management Dashboard Quick Start Guide

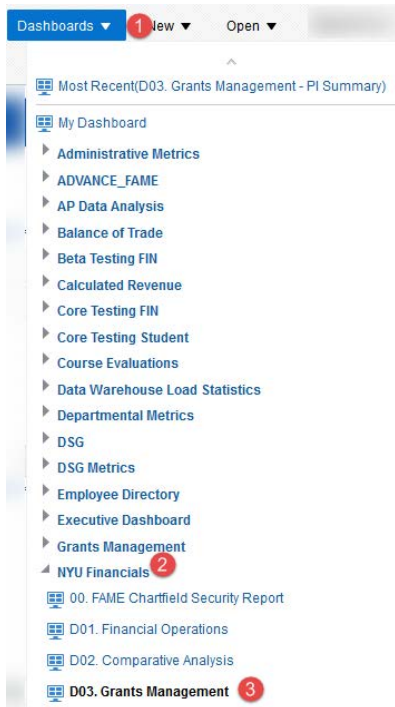
**Version 1.4**

Program Services Office & Decision Support Group

## Accessing UDW+

Login to UDW+ using your **Net ID** as the user name, and **NYUHome** password

Navigate to **Grants Management Dashboard** using the Dashboards menu and then NYU Financials folder.



## 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 screenshot shows the search filters for the PI Summary page. The 'Other Fund Sources' dropdown is circled in red. The filters include:

- Business Unit: \*V5001: NYU WU
- Fund: --Select Value--
- Budget: --Select Value--
- Department: --Select Value--
- Sub Department: --Select Value--
- Org: --Select Value--
- Program: --Select Value--
- Project: --Select Value--
- Project Status: Active
- Project Start Date: In equal to / is in
- Project End Date: In equal to / is in
- Project Purpose: --Select Value--
- Award #: --Select Value--
- Currency: \*USD

Buttons: Apply, Reset

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.

How Much Money is Left on My Grants?

| Sponsor | Award # | Project | Cost Share | PI                   | Project Start Date | Project End Date | Total Award Amount | Total Authorized Budget | Committed Dollars | Exception Amount | Remaining Balance | % of Budget Remaining | Low Budget                 |
|---------|---------|---------|------------|----------------------|--------------------|------------------|--------------------|-------------------------|-------------------|------------------|-------------------|-----------------------|----------------------------|
| -       | -       |         | N          | -                    | 9/1/1976           | 12/31/2015       | 0.00               | 0.00                    | 0.00              | 0.00             | 0.00              |                       | No Budget for this Project |
| -       | -       |         | N          | FRECHETTE, GUILLAUME | 7/1/2012           | 9/30/2012        | 49,087.50          | 0.00                    | 0.00              | 0.00             | 0.00              |                       | No Budget for this Project |
| -       | -       |         | N          | GOLDSTEIN, JOANNE    | 1/1/1950           | 12/31/2015       | 0.00               | 1.00                    | (13.23)           | 0.00             | 14.23             | 1.423%                |                            |
| -       | -       |         | N          | GOLDSTEIN, JOANNE    | 1/1/1950           | 12/31/2015       | 0.00               | 0.00                    | 0.00              | 0.00             | 0.00              |                       | No Budget for this Project |
| -       | -       |         | N          | GOLDSTEIN, JOANNE    | 1/1/1950           | 12/31/2015       | 0.00               | 0.00                    | 0.00              | 0.00             | 0.00              |                       | No Budget for this Project |

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

Flagged Projects

| Sponsor | Project | Status | Underpending | % Budget Remaining |
|---------|---------|--------|--------------|--------------------|
| -       |         | -      | Yes          | 100%               |
| -       |         | -      | Yes          | 1.423%             |
| -       |         | -      | Yes          | 100%               |
| -       |         | -      | Yes          | 100%               |
| -       |         | -      | Yes          | 42%                |
| -       |         | -      | Yes          | 32%                |
| -       |         | -      | Yes          | 100%               |
| -       |         | -      | Yes          | 173%               |

Projects Coming to an End

| Project | Sponsor  | Days Remaining | Flag |
|---------|--|----------------|------|
|         | NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY | 89             | 🚩    |
|         | NATIONAL SCIENCE FOUNDATION                    | 59             | 🚩    |
|         | OFFICE OF NAVAL RESEARCH                       | 11             | 🚩    |
|         | NATIONAL SCIENCE FOUNDATION                    | 59             | 🚩    |
|         | ARMY RESEARCH OFFICE                           | 24             | 🚩    |
|         | NATIONAL SCIENCE FOUNDATION                    | 59             | 🚩    |

When Are My Reports Due

Due in # Days: 120

| Project | PI            | Sponsor  | Report Type | Due Date   | Days Remaining |
|---------|---------------|--|-------------|------------|----------------|
|         | -             | INSTITUTE OF EDUCATION SCIENCES                | Financial   | 10/3/2017  | 120            |
|         | VOLTZ, PETER  | NATIONAL INSTITUTE OF STANDARDS AND TECHNOLOGY | Financial   | 10/30/2017 | 119            |
|         | GUPTA, NIKHIL | OFFICE OF NAVAL RESEARCH                       | Financial   | 7/31/2017  | 28             |
|         | GUPTA, NIKHIL | OFFICE OF NAVAL RESEARCH                       | Financial   | 10/14/2017 | 103            |

- **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). P
- **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.

Sponsor: [Redacted]  
 PI: [Redacted]  
 Award #: [Redacted]  
 Current Overhead Rate: 0.00%  
 Sponsor Fringe Rate: 29.50%  
 Project Start: 3/1/2017  
 Project End: 3/28/2018  
 Overhead Accounts: [Click Here](#)

Project Team: [Click Here](#)  
 Fund: 24 - Foundation & Non-Federal Grant  
 Org: [Redacted]  
 Program: WSGPG - WSG Program default

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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**.

| Account Type             | Account Category  | Account                                | ITD Authorized Budget | Expenses         | Encumbrances     | Pending     | Exceptions  | Total Projected Indirect Cost | Remaining Balance |
|--------------------------|-------------------|--|-----------------------|------------------|------------------|-------------|-------------|-------------------------------|-------------------|
| Direct                   | Personnel Expense | 51102 - Salaries-Instruc. Acad fac FT  | 13,095.00             | 0.00             | 0.00             | 0.00        | 0.00        | 0.00                          | 13,095.00         |
|                          |                   | 51170 - Fringe Benefits-Composite Rate | 5,751.00              | 2,396.10         | 1,931.47         | 0.00        | 0.00        | 0.00                          | 1,423.43          |
|                          |                   | 51219 - GS Regular-Student Hourly      | 6,400.00              | 1,575.00         | 0.00             | 0.00        | 0.00        | 0.00                          | 4,825.00          |
|                          |                   | 51302 - Academic Additional Compensati | 0.00                  | 6,547.37         | 6,547.36         | 0.00        | 0.00        | 0.00                          | (13,094.73)       |
|                          |                   | <b>Personnel Expense Total</b>         | <b>25,246.00</b>      | <b>10,518.47</b> | <b>8,478.83</b>  | <b>0.00</b> | <b>0.00</b> | <b>0.00</b>                   | <b>6,248.70</b>   |
|                          | OTPS              | 60200 - Subcontract within F&A Limit   | 22,000.00             | 0.00             | 22,000.00        | 0.00        | 0.00        | 0.00                          | 0.00              |
|                          |                   | 60210 - Subcontract - no F&A Allowed   | 0.00                  | 0.00             | 0.00             | 0.00        | 0.00        | 0.00                          | 0.00              |
|                          |                   | 65510 - Travel & Living - Domestic     | 2,616.00              | 0.00             | 0.00             | 0.00        | 0.00        | 0.00                          | 2,616.00          |
|                          |                   | <b>OTPS Total</b>                      | <b>24,616.00</b>      | <b>0.00</b>      | <b>22,000.00</b> | <b>0.00</b> | <b>0.00</b> | <b>0.00</b>                   | <b>2,616.00</b>   |
| <b>Total Direct Cost</b> |                   |  | <b>49,862.00</b>      | <b>10,518.47</b> | <b>30,478.83</b> | <b>0.00</b> | <b>0.00</b> | <b>0.00</b>                   | <b>8,864.70</b>   |
| <b>Total Cost</b>        |                   |  | <b>49,862.00</b>      | <b>10,518.47</b> | <b>30,478.83</b> | <b>0.00</b> | <b>0.00</b> | <b>0.00</b>                   | <b>8,864.70</b>   |

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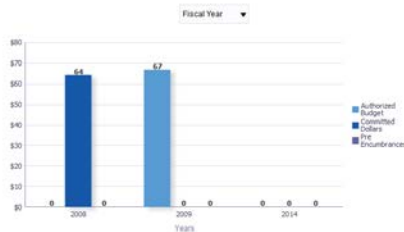
## Grant Budget Detail page

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.

\*\*\* Amounts are displayed in thousands



| Project                               | Sponsor | PI           | Fiscal Year | Accounting Period       | Authorized Budget | Expenses  | Pre Encumbrances | Encumbrances | Pending | Exceptions | Total Projected Indirect Cost | Yearly Remaining Balance | ITD Remaining Balance |             |             |
|---------------------------------------|---------|--------------|-------------|-------------------------|-------------------|-----------|------------------|--------------|---------|------------|-------------------------------|--------------------------|-----------------------|-------------|-------------|
| R0864 - School Of Education Schip Fun |         | MARCUS,ANN L | 2008        | August/Final Adjustment | 0.00              | 64,217.20 | 0.00             | 0.00         | 0.00    | 0.00       | 0.00                          | 0.00                     | (64,217.20)           | (64,217.20) |             |
|                                       |         |              |             | 2008 Total              | 0.00              | 64,217.20 | 0.00             | 0.00         | 0.00    | 0.00       | 0.00                          | 0.00                     | 0.00                  | (64,217.20) | (64,217.20) |
|                                       |         |              |             | 2009 September          | 66,776.00         | 0.00      | 0.00             | 0.00         | 0.00    | 0.00       | 0.00                          | 0.00                     | 0.00                  | 66,776.00   | 2,558.80    |
|                                       |         |              |             | 2009 Total              | 66,776.00         | 0.00      | 0.00             | 0.00         | 0.00    | 0.00       | 0.00                          | 0.00                     | 0.00                  | 66,776.00   | 2,558.80    |
|                                       |         |              |             | 2014 December           | 0.00              | 0.00      | 0.00             | 0.00         | 0.00    | 0.00       | 0.00                          | 0.00                     | 0.00                  | 0.00        | 2,558.80    |
| 2014 Total                            | 0.00    | 0.00         | 0.00        | 0.00                    | 0.00              | 0.00      | 0.00             | 0.00         | 0.00    | 0.00       | 0.00                          | 2,558.80                 |                       |             |             |

Analyze - Refresh - Print - Export

**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.

| Total Award Amount | Total Authorized Budget | Committed Dollars |
|--------------------|-------------------------|-------------------|
| 7,556.50           | 7,556.50                | 873.03            |

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.

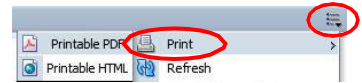
4. The link will open in a separate window. To return to the prior report, use the **“Return”** link (if available), or close the newly created browser window.



## 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](#)  
[About this page](#)

### "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](mailto: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)**.