

USING THE DASHBOARD

The purpose of the Dashboard is to deliver concise financial information on the grants that you manage. The different features of the dashboard are explained below.

Project/Grant	P/G Description	PG End Date	SpeedChart Key	Budget Balance Available	Comments
20R43785	CIHR CRI-88362	03/31/2013	JTQN	250,000.00	
20R63142	CFRI	06/30/2013	JQFR	113,000.00	
21R05818	Genome BC	12/31/2008	HKJZ	-49,751.02	Balance available is in deficit and the PG has expired
21R06054	Pfizer Canada Inc.	12/31/2008	JCAB	-73,045.40	Balance available is in deficit and the PG has expired
21R06156	Eli Lilly Cda B4Z-CA-0017 B4Z-	12/31/2008	JKGJ	233,592.52	PG is expired

Information being displayed

The dashboard tells you:

Project/Grant – The PG number

P/G Description – Source of your funds

P/G End Date – Contractual end date of the current agreement

Speed Chart – The speed chart linked to the PG number (only one speed chart is shown even if more exist)

Budget Balance Available – Total budget less expenses and commitments.

Comments – see comment section below

Project/Grant

The PG number is hyperlinked. Clicking on it will direct you to information about the PG, such as the RTA clerk who looks after the PG and those with signing authority.

Budget Balance Available

Balances in this column are also hyperlinked. Clicking on this figure will give you more information as to how it was derived. The steps to view this information are:

1) Click the budget balance that you are interested in. You'll be directed to the summary ledger, as shown on the next page:

PROJECT_ID -		Statement of Funding & Expenses For the Period Ended January 31, 2009	
Manager:			
Project Title:			
Speedchart:			
DeptId:			
Fund:			
Status:	Open		
Project Year End Month:	Jul		
PG End Date:	December 31, 2008		
		(R)	(C)
		Current Month	Year To Date August-January
Funding			
Unspent Amount from Prior Year	(A)		\$ 500,000.00
Total Funding Available		\$ 0.00	\$ 500,000.00
Expenses			
Salaries & Benefits (510000-549999 and 590000-599999)		\$ 0.00	\$ 98,070.64
Supplies & other (All other expenses)		\$ 3,828.71	\$ 147,259.95
Travel (610000-636999)		\$ 2,506.58	\$ 21,066.89
Total Expenses		\$ 6,335.29	\$ 266,397.48
Current Balance *			\$ 233,602.52
Commitments *			
Other commitments	(D)		\$ 10.00
Total Commitments			\$ 10.00
Projected surplus (deficit) to Jul-2009			\$ (F) 233,592.52

1) Current balance represents the unspent amount as at the month selected. The balance is calculated by taking expenses off of the total funding available.
2) Commitments are future expenses (Purchase order + Salary) not yet paid.

This summary ledger tells you:

- Funding - The budget balance available carried from prior year plus current year budget. **A**
- Current month expenses by category – expenses are current up to the previous business day. **B**
- Year to Date expenses by category – This is from the anniversary of the start date, up to the last business day. **C**
- Commitments – Outstanding pledged expenses from today, up to the end of the fiscal year. **D**
- Projected surplus (deficit) – Funding available less year to date expenses and commitments. **E**

2) The expenses are hyperlinked, clicking on any of them will give you the individual transactions that make up this amount. The below example shows the transactions that make up \$3,828.71 in the current month expenses section above:

Program	Journal Id	Line #	Journal Line Date	Posted Date	Source	Source Ref #	Description	Vendor	Invoice Id	UBC Reference #	Purchase Req #	Actuals
JAN-2009												
Account 641300 Couriers												
S27	0004087934	2	06-JAN-09	06-JAN-09	JVD		Couriers					-58.67
											Total for Account 641300	-58.67
Account 641400 Customs & freight												
P01	0004114630	1	05-JAN-09	09-JAN-09	JVX	310-089302	ILLUMINA -JLDZ					2,274.28
											Total for Account 641400	2,274.28
Account 641500 Printing & copying												
C03	0004081525	3	01-JAN-09	01-JAN-09	JVM		Printing & copying					353.10
											Total for Account 641500	353.10
Account 712000 Consulting fees												
S02	AP04085259	11706	01-JAN-09	02-JAN-09	APV	03881786	Procurement or supply chain tr	SODERLIND,KRISTA-JUNE	POPI-023-2008	2007002332		1,260.00
											Total for Account 712000	1,260.00
											Total	3,828.71
											Report Total	3,828.71
												Export Results to Excel

The expenses can be downloaded to Excel by clicking on the “Export to Excel” button.

Comments

A comment is displayed in this section to alert to you that:

Your balance is 10% or less of your total funding

Your total expenses are greater than your total funding (in deficit)

You are within 90 days of your PG end date

You are past your PG end date (expired)

A single PG can have date and balance issues so the comment will alert you to both problems, not just one.

As stated earlier the PG end date is determined by the grant award letter or contract. The system will alert you to those PG's that are nearing their end date so that extensions, amendments or new contracts can be arranged. **Remember that for certain PG's, payroll appointments cannot extend past the contractual end date and will be rejected if they are submitted.**

PG's in deficit that will not receive any future funding should be cleared, and if the research project is finished the PG should be closed. However, a PG cannot be closed until it is showing a zero balance.

Displaying all of your PG's

The dashboard only displays the first 5 PG's, sorted numerically. To display all of your PG's please click the "Click here to review more PGs and to download to Excel" hyperlink. Another tab will open up automatically displaying all of the PG's that you manage (please note that you cannot navigate back to the Management Systems Portal using the back button, you have to close the new window or open the older window).

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[Click here to review more PGs and to download to Excel](#)



[Customize](#) | [View All](#) |  First 1-15 of 15 Last

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21R41495	BCRICWH	12/31/2011	EJLF	-15,888.35	Balance available is in deficit
21R42054	BC Ministry Health 2005/314	09/30/2008	HGJQ	21,941.51	PG is expired
21R42150	Various Sources	12/31/2008	HKNG	167,943.91	PG is expired
21R42205	CFRI	12/31/2008	HLYV	61,535.81	PG is expired
21R42893	Pfizer Canada Inc.	12/31/2012	JKXF	600,000.00	
21R42977	Public Health 6271-15-2007/397	03/16/2009	JNQV	123,475.00	PG is expired
21R52924	M. Smith INURA001045	09/30/2009	HDRT	1,472.98	Balance available is less than 10% of budget
21R61926	HC	03/31/2007	HAFJ	13,049.42	PG is expired
21R62489	Merck Frosst Cda Ltd	12/31/2008	HRJH	0.00	PG is expired
21S30061	Pharmaceutical Outcomes Prog	03/31/2099	DZKF	273,282.10	

This page shows you the first 20 PG's, click on "View All" to view all of them or click  to view the next batch of 20 if more PG's exist. Click on "Last" to view the last 20 PG's.

Downloading to Excel

If you would like to download the information in the Dashboard to Excel, simply click , you must temporarily or permanently allow pop-ups from this website.

Sorting the information in the Dashboard

You can sort the information in the Dashboard by clicking on any of the six column titles. The first click will arrange the information in an ascending order, the second in a descending order. Please note that sorting via the Budget Balance Available doesn't work due to system limitations.

Access to the Dashboard off-campus

If you would like to view the Dashboard off-campus then VPN access is needed.