



UMDASHBOARDS USER MANUAL

"Fostering stronger data driven planning and decision making in a more visually engaging format."





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UMDashboards User Manual


General Instructions

Logging Into iDashboards

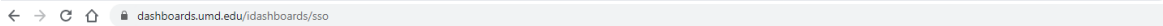
Click on or copy and paste the following URL in your browser of choice:

<https://dashboards.umd.edu/idashboards/sso>

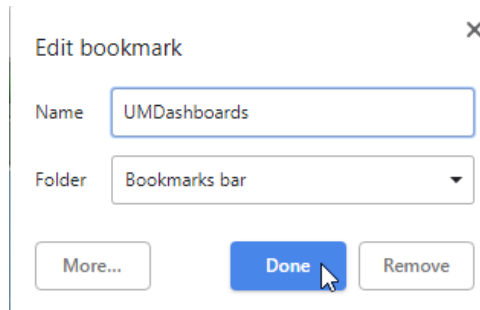
Bookmark: add the site as a bookmark or favorite:

- a. Chrome (Preferred): 

- i. Bookmark icon 



- ii. Name the Bookmark and click Done:



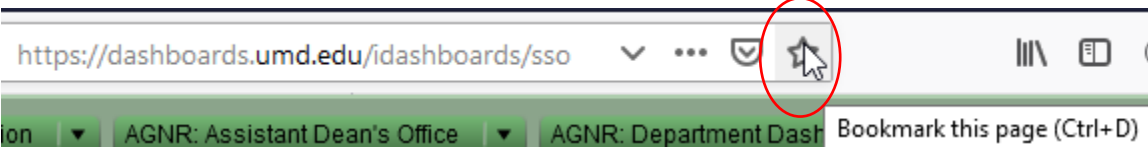
Edit bookmark ×

Name

Folder

- b. Firefox: 

- i. Bookmark icon: 

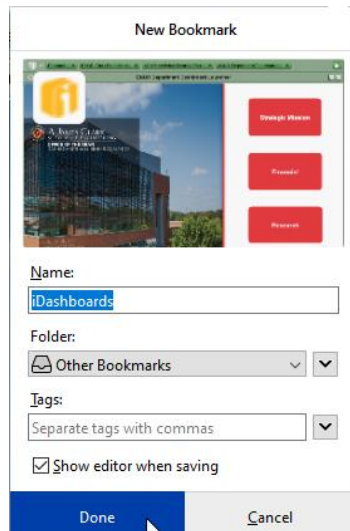


<https://dashboards.umd.edu/idashboards/sso>

AGNR: Assistant Dean's Office AGNR: Department Dash

Bookmark this page (Ctrl+D)

- ii. Click Done at the bottom



New Bookmark

Folder:

Tags:

Show editor when saving



User Credentials: If you are unable to authenticate using the University CAS system and the below log in screen pops up, enter in your UMD directory ID and password. UMDDashboards uses single-sign on authentication. Click Login.

The login form features the iDashboards logo at the top. Below it is a text input field containing the username "testuser". Underneath the username field is a password input field with a lock icon on the left and a series of dots representing the password. At the bottom of the form is a prominent orange button labeled "LOG IN".

*The "Log In automatically" checkbox will remember your user credentials and automatically log into iDashboards when navigating to the above URL.

Assistance Logging In?

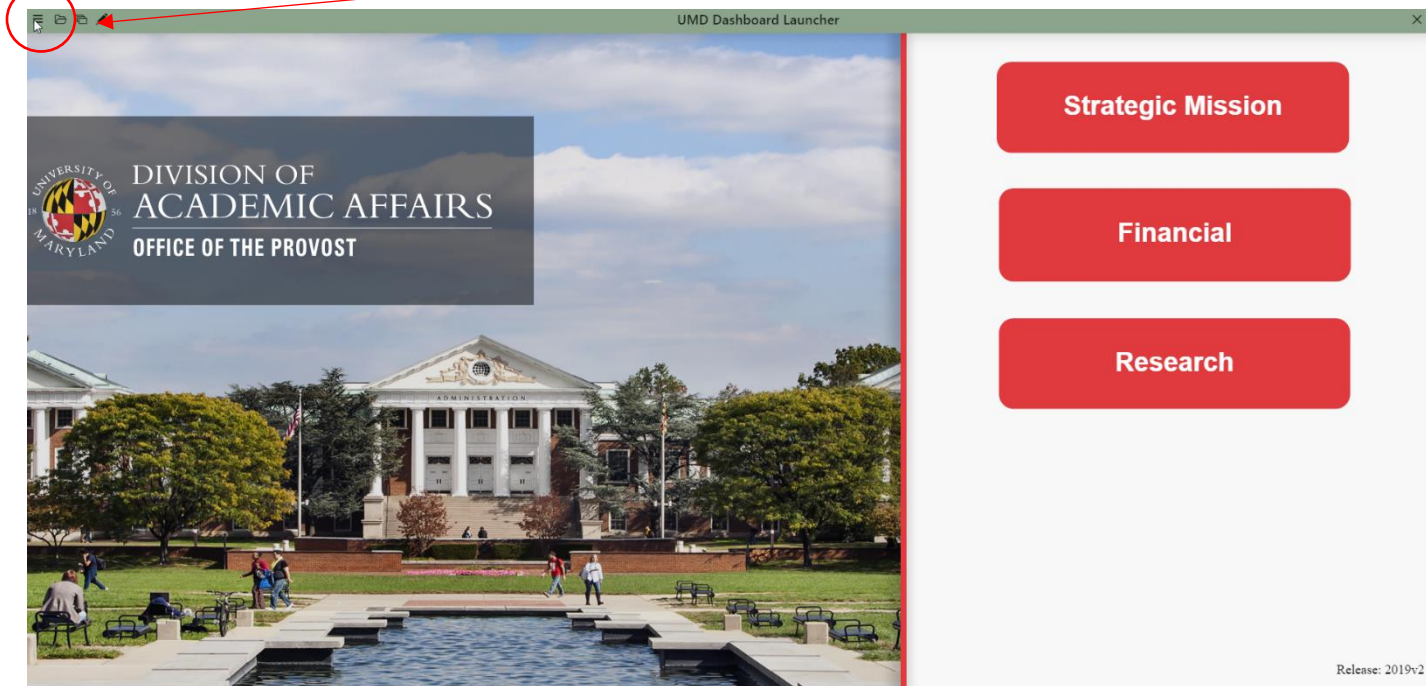
Contact Dashboard & Analytics: <https://analytics.umd.edu/contact/>

Settings

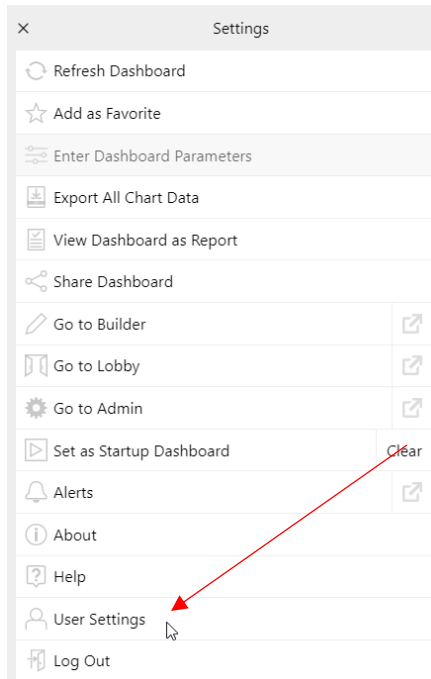
iDashboards has several configurable user settings including changing the default color scheme or skin of the application, default language, category sort order, etc. This manual will outline the user settings most commonly used.

User Settings: The User Settings window can be access by selecting the Hamburger menu located in the

top left of the iDashboards application:



Release: 2019v2



Change Password: not applicable with University CAS integration.

Authenticate: Not currently operational.

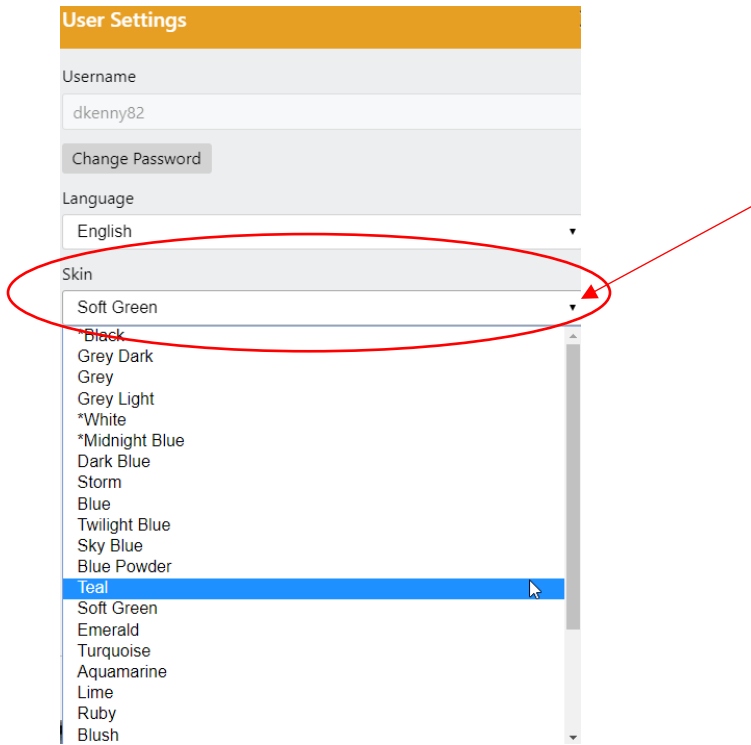
Category Sort Order:

- Server Order (Default Setting): sorts categories by server order designated by dashboard admin
- Alphabetical – Ascending
- Alphabetical - Descending

Dashboard Sort Order:

- Server Order (Default Setting): sorts dashboards by server order designated by dashboard admin
- Alphabetical – Ascending
- Alphabetical - Descending

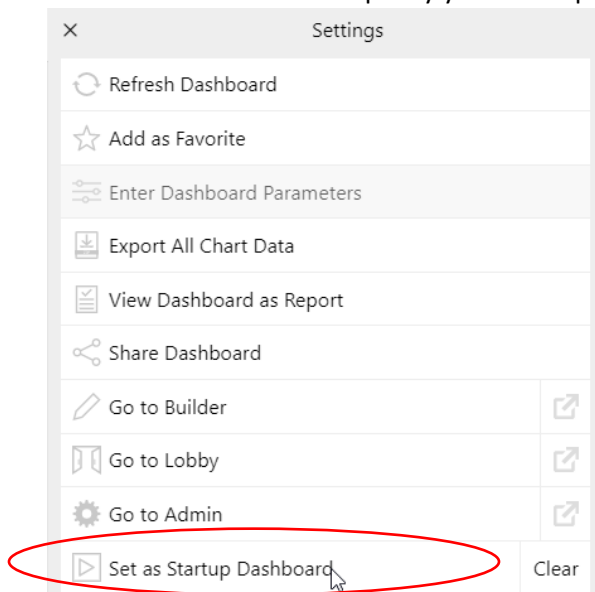
Changing Skin: The iDashboards default skin is “Soft Green”. You can customize the skin or application color scheme within the User Settings by clicking on the dropdown box and selecting your desired color scheme. You must click Save in order to view the new skin color:



Designating a Startup Dashboard: Similar to bookmarking a page on a browser, a user can define a start-up dashboard which will appear upon first logging into iDashboards. The Startup Dashboard can be defined by:

1. Navigate to the dashboard you'd like to appear when logging in UMDashboards.
2. Hamburger Menu → Startup Dashboard

Click the Select button to specify your startup dashboard:



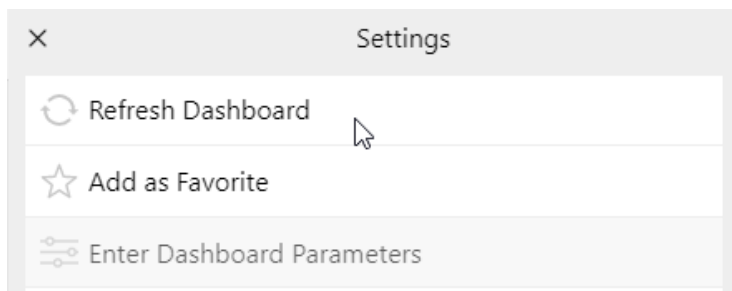


Additional Settings:

Refresh Dashboards:



The Refresh icon allows a user to easily refresh the dashboard to update the any newly available data and/or reload the dashboard to remedy chart data errors as show below:

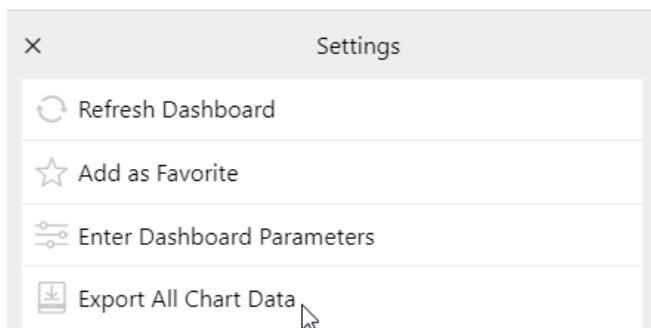


Alerts:

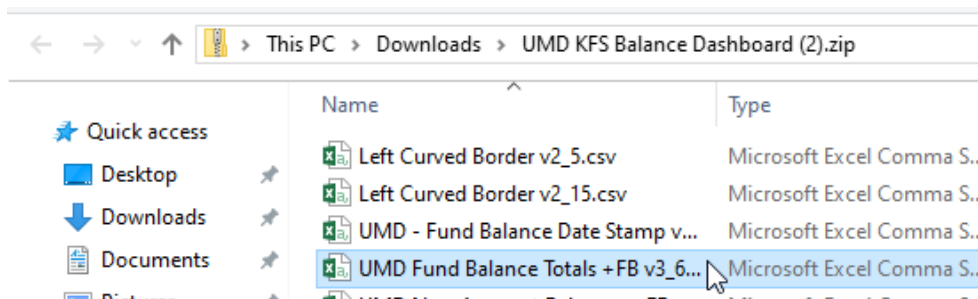


Not currently utilized for UMDashboards.

Export All Chart Data:



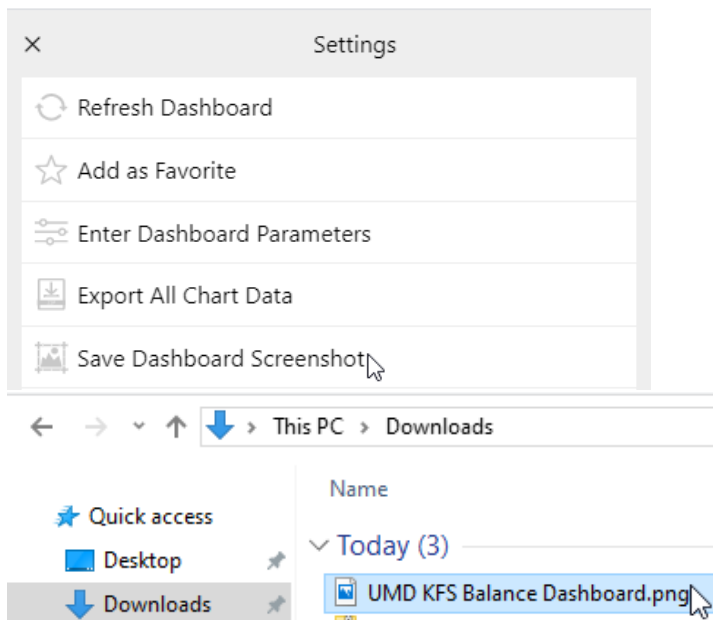
The Export All Chart Data allows users to export all underlying data used to develop the charts in the dashboard. Upon clicking on the Export All Chart Data option, the application will begin downloading all chart data into a zip folder. Users can then open the zipped file and select the .csv file they would like to review:





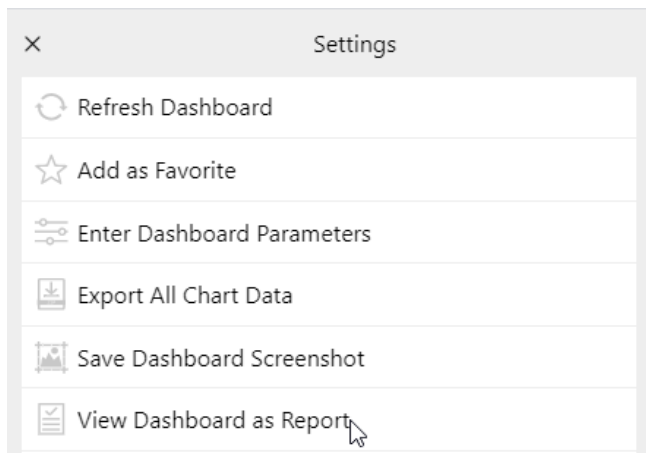
Save Dashboard Screenshot:

Selecting this option will prompt the download of a .png image of the currently opened dashboard. The image will be downloaded to your default downloads folder.



View Dashboard as Report:

This option will open a new browser window and will convert the currently opened dashboard into a “report”. The report can be downloaded and saved as a PDF. Note that current formatting is rigid and not very user friendly.



Help:

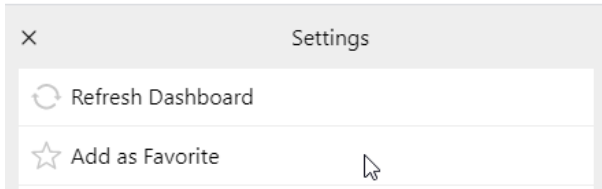
This option will launch a Help window with brief sections on how to navigate the dashboards. This help guide was developed and is managed by the vendor iDashboards.



Add as Favorite:

This option will allow you to save a currently opened dashboards as a favorite. Users can then access their dashboard Favorites by:

1. Navigate to the dashboard you'd like to designate as a "Favorite" and go to dashboard hamburger menu and select "Add as Favorite"



2. To access your favorites select the Open folder in the top left corner

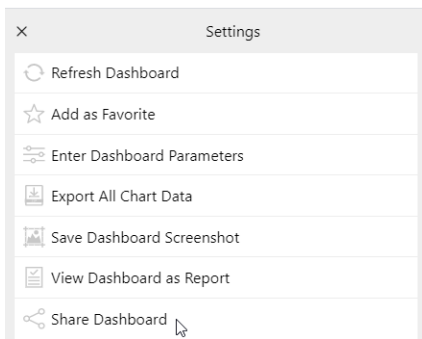


3. Choosing Favorites under Categories

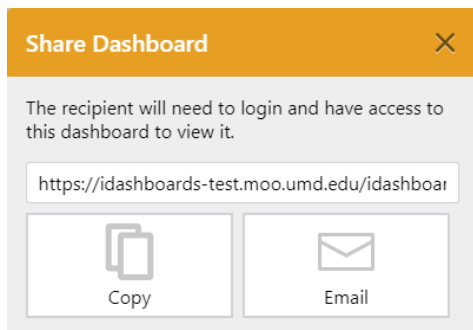


Share Dashboard: Users can now share dashboards using the Share Dashboard feature under the Settings menu.

1. Select the settings hamburger menu and choose Share Dashboard



2. Users will then be provided the option of sharing the dashboard via "Copy" which will copy the dashboard link provided and can be pasted in an email or messaging platform (Gchat/Slack). Selecting the "Email" option should launch a new message for your default email application/provider:



Searching for & Opening a Dashboard

Users can search for and open dashboards using the following navigation methods:

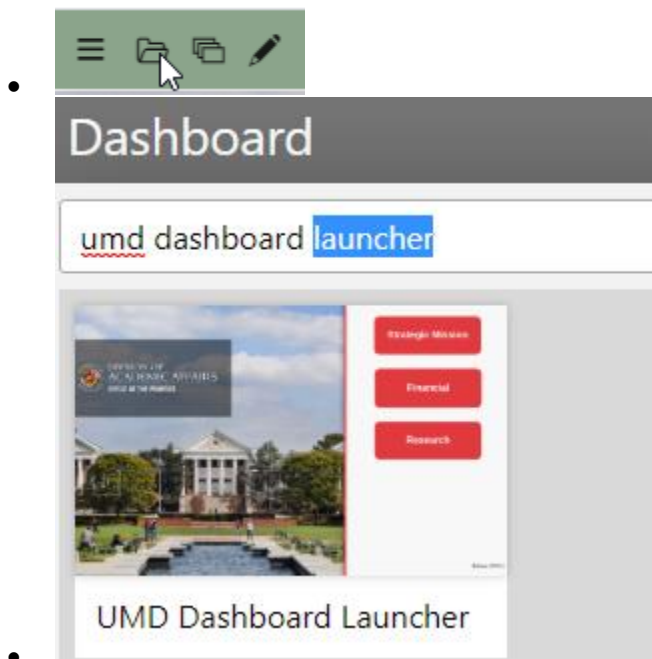
1. Open folder menu icon located in the top left corner



2. Using the dashboards saved under Favorites
3. Clicking on a dashboard image within the dashboard launcher

Searching for a Dashboard

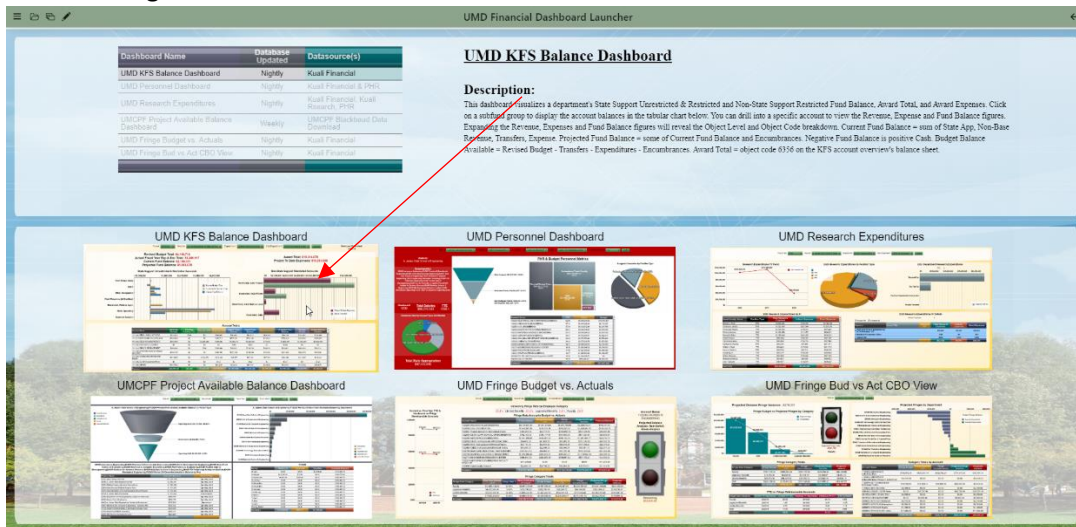
Users can now search for dashboards using the “Search for Dashboard...” text box after choosing the Open Dashboard icon in the top left corner of the application browser. The below example details searching for the UMD Dashboard Launcher.



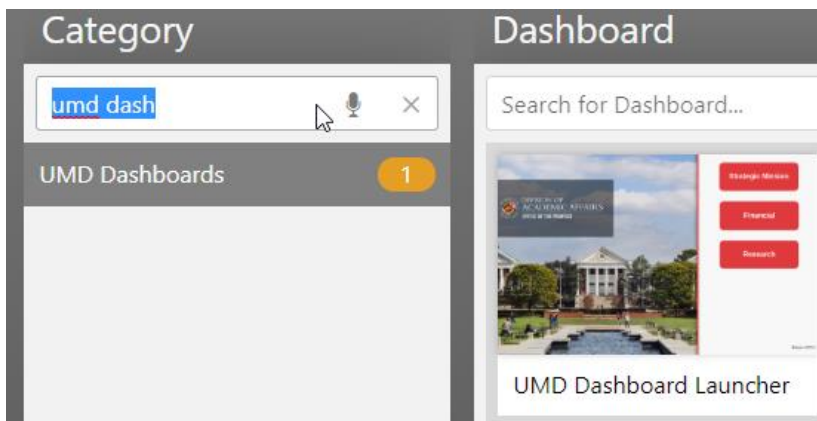


Opening a Dashboard

1. If you designated a dashboard launcher as your startup dashboard, you can simply click on a dashboard image to launch a dashboard:



2. If applicable, users with multiple categories can search dashboards across categories using the "Search for Dashboard..." or can narrow down the dashboards available within a category or categories by using the "Search for Category..." box





Overview of Available UMDashboards

The UMDashboards were developed by a collaborative team comprised of college, department and administrative resources. Each dashboard tells a different story aimed at identifying opportunities, facilitating productive conversations and assisting in planning.

1. Standardized reporting from multiple data sources within one user interface.
2. Aggregated and detail level financial information with a click of a mouse.
3. Timely and accurate reporting tools to facilitate planning and decision-making.
4. Engaged end users via intuitive, visually appealing data visualizations.

The dashboards are comprised of multiple campus datasources including: KFS, PHR, BPM and Quali Research (KR).

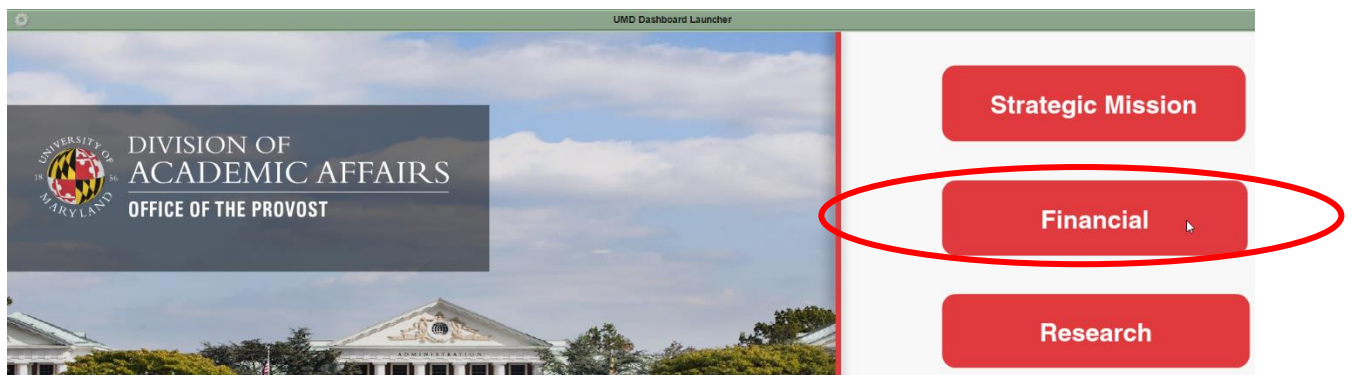
UMDashboard Launcher

The UMDashboard Launcher Dashboard contains category links to five different sets of dashboards:

1. **Financial** – a suite of financial dashboards to aid in the oversight and management of department finances and position management.
2. **Research** – a suite of research related dashboards displaying sponsored research metrics.

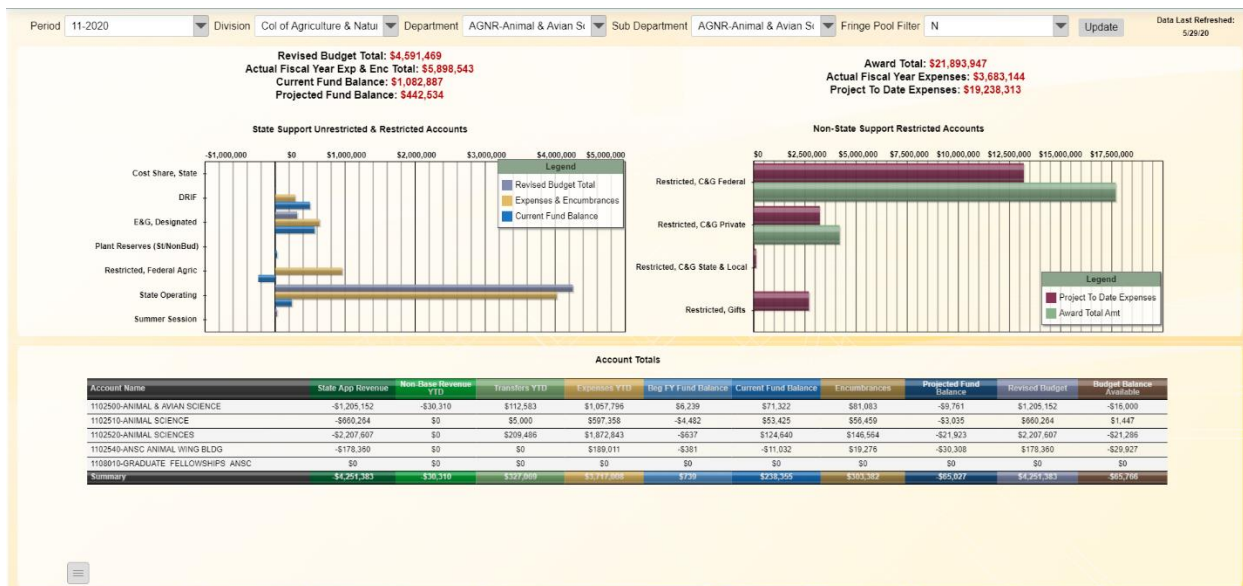
Financial Dashboards

A suite of financial dashboards to aid in the oversight and management of department finances and position management. The suite of financial dashboards can be accessed by click on the “Financial” button located on the UMD Dashboard Launcher under the UMD Dashboards category.





UMD KFS Balance Dashboard:



Overview & Purpose:

This dashboard visualizes a department's Non-Restricted and Restricted Fund Balance and Budget Balance Available. Click on a subfund group to display the account balances in the tabular chart below. You can drill into a specific account to view the Revenue, Expense and Fund Balance figures. Expanding the Revenue, Expenses and Fund Balance figures will reveal the Object Level and Object Code breakdown. The fringe pool filter allows users with division level access to filter the dashboard to view only the fringe pool accounts (Y), all accounts (Y,N) or all other accounts (N).

The purpose of this dashboard is to allow division, department and subdepartment business managers to:

1. Understand the financial state of the selected unit(s).
2. Identify funding sources including current year budget balance available and projected fund balance. **Projected Fund Balance**=Current Fund Balance – Encumbrances.
3. In collaboration with unit leadership, design financial plans to support strategic objectives and day-to-day operations.

Available Filters:

1. Period: previous end of year (EOY) and current, active FY fiscal period.
2. Division
3. Department
4. Sub Department
5. Fringe Pool Filter

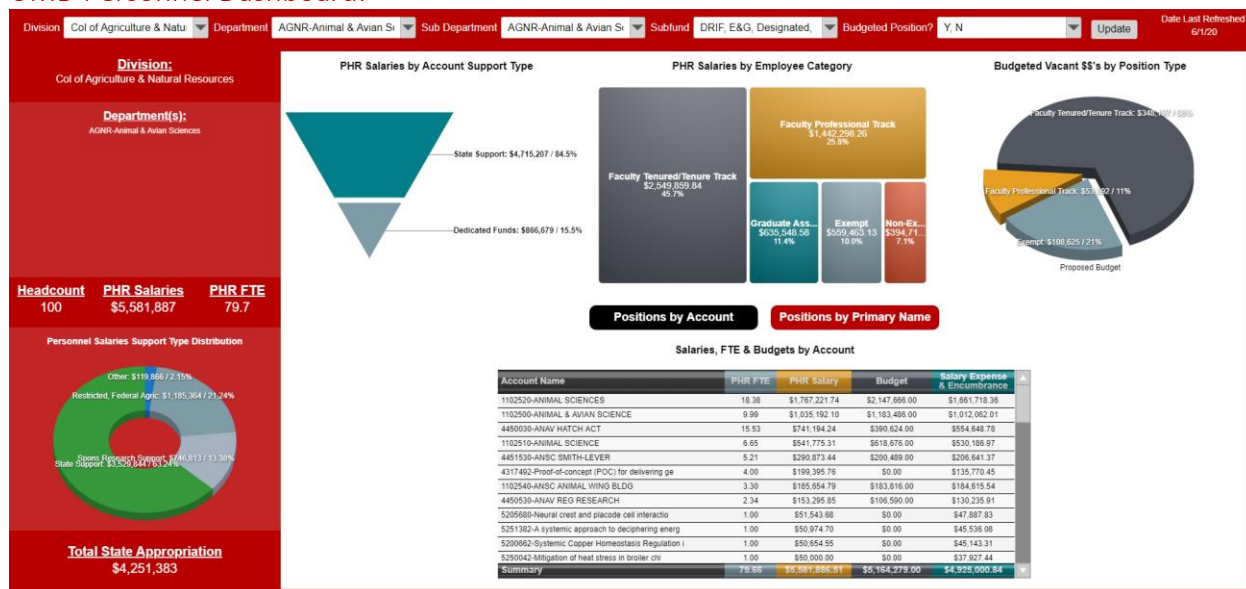
Overview of Charts:

Chart Name	Chart Description	Drills To?
State Support Unrestricted & Restricted Accounts (Text)	Displays revised budget total, fiscal expense & encumbrance totals, current and projected fund balances for non-restricted subfund groups.	N/A



State Support Unrestricted & Restricted Totals (Bar Chart)	Visualizes revised budget, expenses & encumbrances and current fund balance totals by State Support Unrestricted & Restricted subfund group.	Account Totals (tabular chart)
Account Totals (Tabular Chart)	This tabular chart, controlled by the Non-Restricted and Restricted Bar Charts, displays the accounts balances of several key financial metrics in the selected subfund.	Account Details
Account Details (Tabular Charts)	Displays the selected accounts balances by Transaction Object Type (Expenses, Fund Balance, Transfers, Revenues). Users can expand the object type for an object level and object code detail view).	KFS Account Overview
Restricted Accounts Totals (Text)	Displays award totals and project to date expenses of Non-State Support restricted subfund groups.	N/A
Restricted Totals (Bar Chart)	Visualizes award totals and project to date expenses by subfund.	Account Totals (tabular chart)

UMD Personnel Dashboard:



Overview & Purpose:

Replacing the UMD Faculty & Staff dashboard, this dashboard displays all employees' PHR salaries, related budget and KFS salary expense & encumbrances. The purpose of this dashboard is to provide a tool to units to easily identify employee funding resources and manage position vacancies for personnel management and utilization. Users can sort by account or by primary name and drill into an employee's details to see all funding accounts/sources across the University.

Available Filters:

1. Division
2. Department
3. Subdepartment
4. Subfund
5. Budgeted Position?

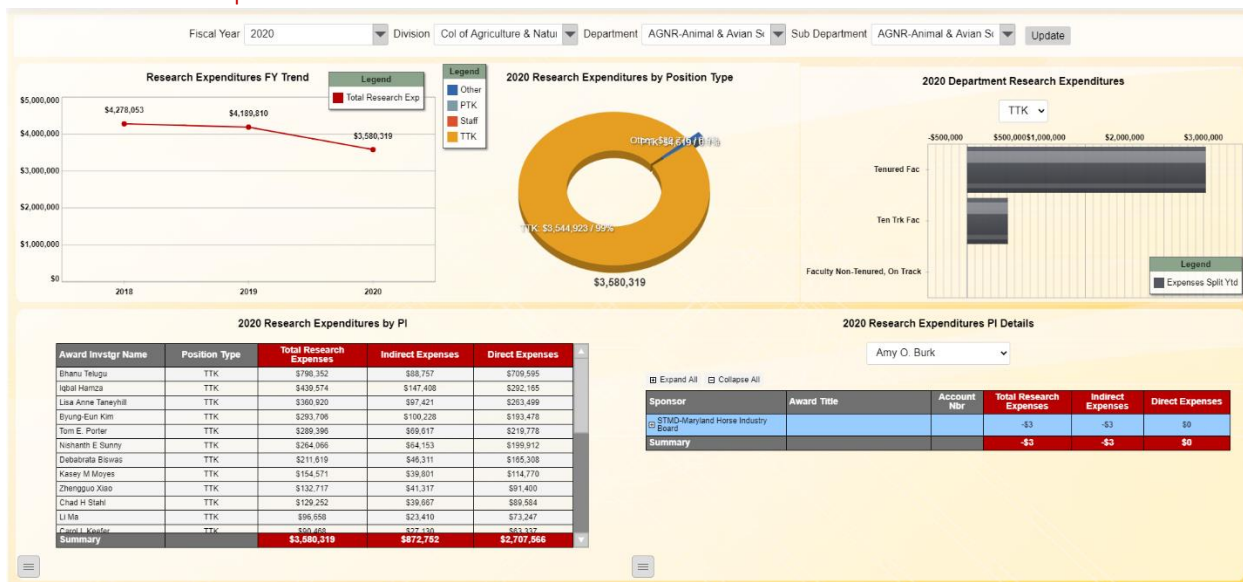


Overview of Charts:

Chart Name	Chart Description	Drills To?
PHR Metrics (Text)	PHR metrics down left hand side of dashboard displaying Headcount, PHR salaries, PHR FTE	N/A
Personnel Salaries Support Type Distribution (Pie)	Breakdown of the PHR salary distributions by State Support, Sponsored Research or Other. AGNR includes Capacity and County breakdown.	N/A
Total State Appropriation (Text)	Total of object 0221. Includes both salaries & wages and operating appropriations.	N/A
PHR Salaries by Account Support Type (Pyramid)	Visualizes PHR salaries by account type (state, support, dedicated funds, non-budgeted funds, etc.)	N/A
PHR Salaries by Employee Category (Treemap)	Displays PHR salaries by employee category.	Salaries by Employee Category & Primary Name
Account Funding & Budget Details (Tabular)	Displays all funding accounts across the University by the selected employee.	N/A
Budgeted Vacant \$\$'s by Position Type (Pie)	Budgeted proposed vacancy \$\$'s from the live budget	Employee Category Budgeted Vacancies
Positions by Account (Button)	Fires a tabular chart by account with PHR FTE, PHR Salary, Budget and Salary Expense & Encumbrance	Account Personnel Salaries by Employee Object Code
Account Personnel Salaries by Employee Object Code	Listing of employees paid on the selected account group by object code.	Account Funding & Budget Details (Tabular)
Positions by Primary Name (Button)	Fires a tabular chart by employee with the following fields: Employee Category, PHR FTE, PHR Salary, Budget and Salary Expense & Encumbrance	Account Funding & Budget Details (Tabular)



UMD Research Expenditures



Overview & Purpose:

This dashboard visualizes the department/subdepartment research expenditures by fiscal years 2018-2020 **administered by the department** by position type, category status and PI. Users can filter the bar chart by position type by clicking on any slice of the pie chart to the left of the bar chart titled "...Research Expenditures by Position Type". The "...Research Expenditures by PI" tabular chart can be sorted by any of the column names. Clicking on an investigator drills the investigator's research expenditures by sponsors and selected fiscal year. Users can expand the tabular chart to reveal the award title, account number and the breakdown of the research expenditures.

The purpose of this dashboard is to allow division, department and subdepartment business managers to:

1. Identify the selected fiscal year's research expenditures administered by the unit by position type, category status, investigator and investigator award details including title, account number and indirect vs. direct expenses.

Available Filters:

1. Fiscal Year
2. Division
3. Department
4. Sub Department

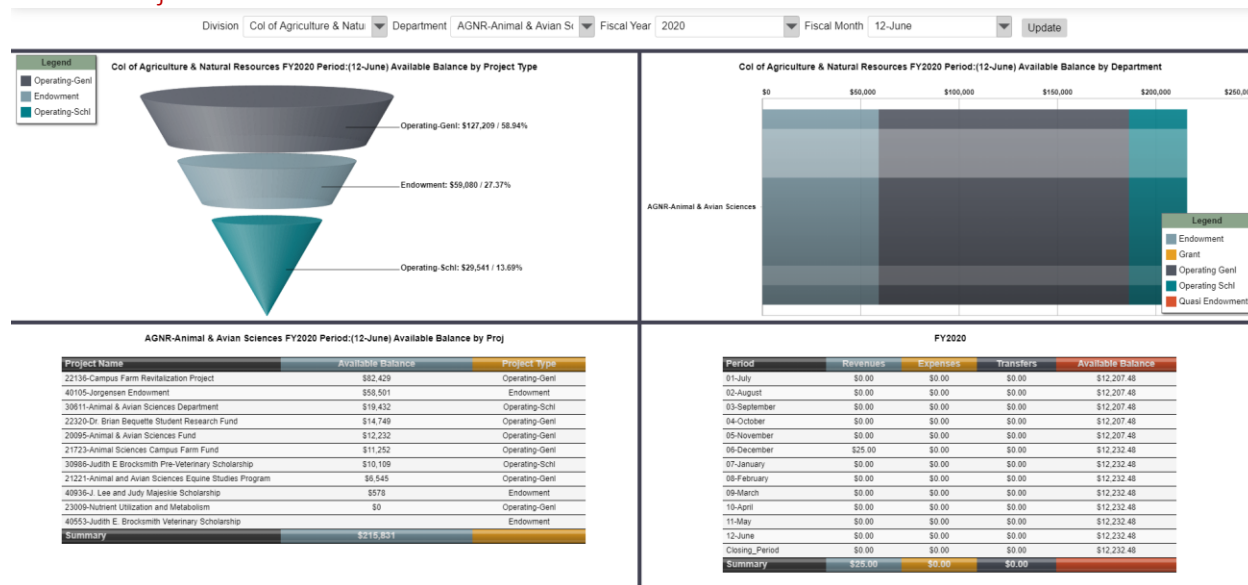
Overview of Charts:

Chart Name	Chart Description	Drills To?
Research Expenditures by FY Trend	Displays the selected unit(s) research expenditures by fiscal years.	N/AW
Research Expenditures by Position Type (Pie Chart)	Displays research expenditures by position type: TTK, PTK, Staff, etc.	Department Research Expenditures



Department Research Expenditures (Bar Chart)	Totals by category status by the selected position type chosen/drilled from the adjacent pie chart.	N/A
Research Expenditures by PI (Tabular Chart)	Total research expenditures, indirect and direct expenditures by investigator credit split in the administered unit.	2018 Research Expenditures PI Details
Research Expenditures PI Details (Tabular Chart)	Investigator 2018 research expenditures details by sponsor, award title and account number.	N/A

UMCPF Project Available Balance Dashboard:



Overview & Purpose:

The UMCPF Project Available Dashboard features endowment and operating available balances by department, project, fiscal year and fiscal month.

****Please note that this dashboard requires users to request access.****

The UMD Award \$\$'s by Agency & Sponsor dashboard features the division and or department award totals and trend by fiscal year. Users can pivot the treemap chart by selecting clicking on a conical slice in the above cone chart. Selecting a treemap project box will drill the adjacent tabular chart with Revenue, Expense, Transfer and Available Balance totals by project within the selected fiscal year/period.

- **Available Balance Calculation:**
 - Operating: Running balance net of project expense, revenue and transfers
 - Endowment: Budget – Current FY expenses



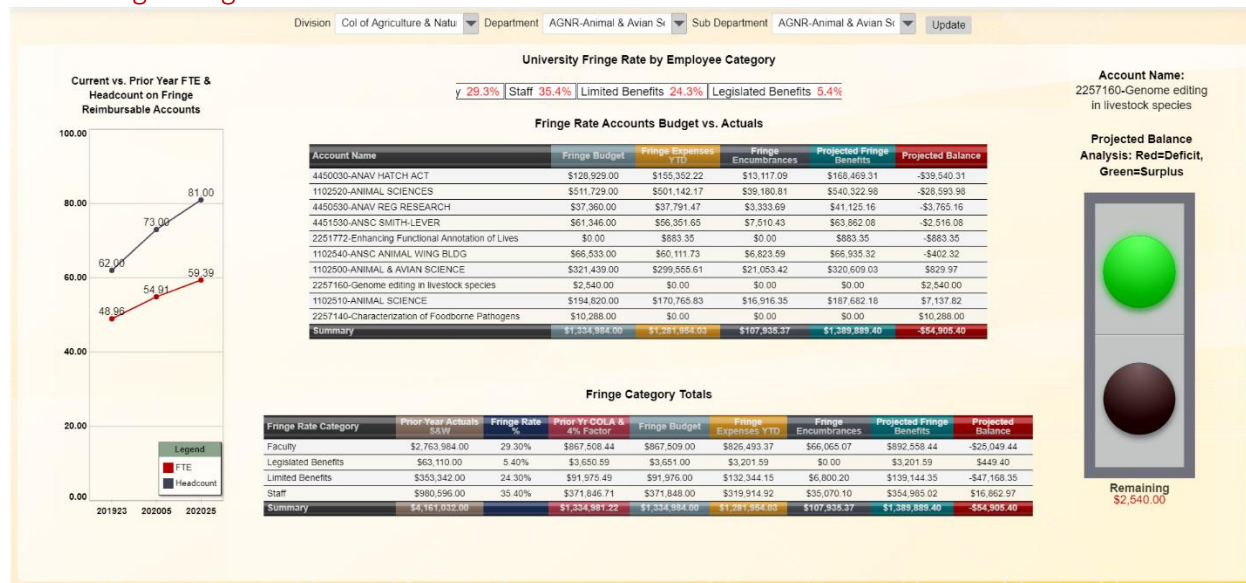
Available Filters:

1. Division
2. Department
3. Fiscal Year
4. Fiscal Month

Overview of Charts:

Chart Name	Chart Description	Drills To?
Available Balance by Project Type (Conical)	Displays the project available balances by project type (Endowment, Operating General, Operating Scholarship, etc).	Available Balance by Proj
Available Balance by Department (Stacked Bar)	Displays the project available balances by Department within the Division.	N/A
Available Balance by Proj (Tabular)	Visualizes the project available balances by project name and project type.	Project Fiscal Period Totals
Project Fiscal Period Totals (Tabular)	Displays revenue, expense and transfer totals of the selected project within the selected FY.	Transaction Details
Transaction Details (Tabular)	Charts the transaction details comprising the revenue, expense and transfer totals.	Blackbaud NXT User Application

UMD Fringe Budget vs Actuals:



Overview & Purpose:

The UMD Fringe Budget vs Actuals dashboard visualizes fringe budgets by Division, Department, Sub-Department and account vs. the fringe rate expenses and outstanding fringe encumbrances. Users can selected a Division, Department or Sub-Department. The top tabular chart with the account listing and thermometer to the left will refresh upon the selected filter inputs. Users can scroll over the account listing and the spotlight will interact with the account's projected balance. Green light=projected surplus and Red light=projected deficit. Click on an account will drill the bottom tabular chart to



visualize the account’s fringe rate category totals. Selecting on a fringe rate category will drill to the object code totals within the fringe rate category.

- Encumbrance Calculation: Outstanding salary & wage encumbrance X applicable fringe rate category %

Available Filters:

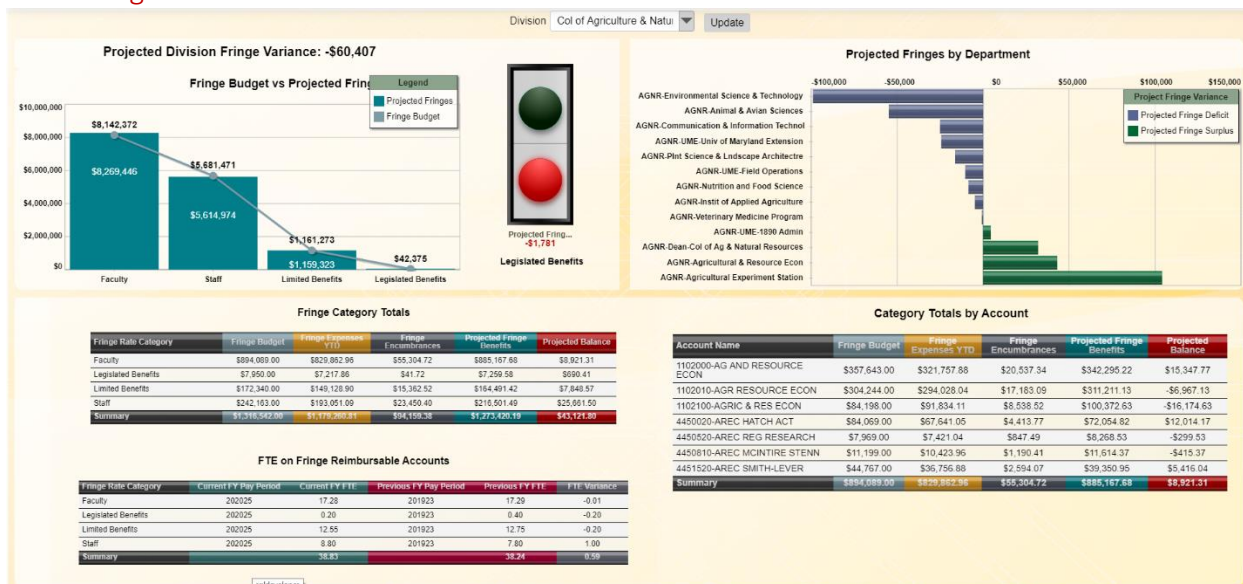
1. Division
2. Department
3. Subdepartment

Overview of Charts:

Chart Name	Chart Description	Drills To?
University Fringe Rate by Employee Category (Ticker)	Displays the campus fringe rate reimbursement percentages by fringe rate category.	N/A
Current vs. Prior Year FTE & Headcount on Fringe Reimbursable Accounts (Trendline)	Displays prior year pay period 23 and the most recent current year pay period PHR FTE & Headcount on fringe reimbursable accounts.	N/A
Fringe Rate Accounts Budget vs Actuals (Tabular)	Visualizes the fringe budget, expenses YTD, outstanding encumbrances, projected expenditures and projected balance by fringe reimbursable account.	Fringe Rate Category Totals Interacts with Stoplight
Projected Balance Analysis (Stoplight)	Demonstrates projected fringe account balance with Green=projected surplus, Red=projected deficit	N/A
Fringe Category Totals	Displays revenue, expense and transfer totals of the selected project within the selected FY.	Fringe Rate Object Code Details
Fringe Rate Object Code Details	Displays revenue, expense and transfer totals of the selected project within the selected FY by the account.	N/A



UMD Fringe Bud vs Act CBO View:



Overview & Purpose:

The UMD Fringe Bud vs Act CBO View dashboard visualizes projected fringe variances by the fringe rate category and by unit within the selected division. This dashboard is accessible to all UMDashboards users with financial dashboard access but its primary audience is intended for the College Budget Officers (CBOs).

At the top left of the dashboard above the column chart titled “Fringe Budget vs Projected Fringes by Category” is the total projected fringe variance for the division. Running your mouse cursor over the top left column chart will prompt the spotlight to the right to change column:

- **Green** = Projected Fringe Balance Variance SURPLUS
- **Red** = Projected Fringe Balance Variance DEFICIT

The Projected Fringes by Department bar chart visualizes the projected surplus or shortfall of the divisional department’s fringes. Click on any department’s bar will filter the three tabular charts at the bottom of the dashboard.

The bottom three tabular charts allow users to view the breakdown of the fringe category totals as well as the most current pay period FTE and prior FY, ending pay period FTE to compare and contrast if a department’s FTE has increased or decreased over the previous year. Users will also see a list of the selected department’s state support accounts that are impacted by the fringe rate. Users can drill into any account to reveal the object code level details comprising the account totals.

- Encumbrance Calculation: Outstanding salary & wage encumbrance X applicable fringe rate category %

Available Filters:

1. Division
2. Department
3. Subdepartment

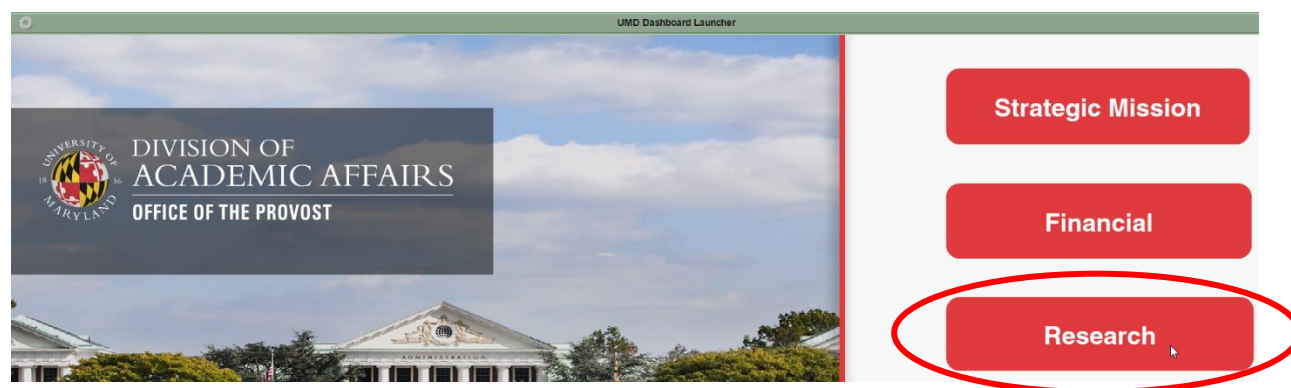


Overview of Charts:

Chart Name	Chart Description	Drills To?
Projected Division Fringe Variance (Text)	Displays the selected division’s total projected fringe variance.	N/A
Fringe Budget vs Projected Fringes by Category (Column with Line)	Displays the selected division’s projected fringes vs fringe budget by fringe category.	Controls adjacent Stoplight
Fringe Category Stoplight (Stoplight)	Animated visual displaying projected fringe variance by color when hovering over a fringe category in adjacent column chart. Green=surplus, Red=deficit.	N/A
Projected Fringes by Department (Bar chart)	Visualizes projected fringe rate variances by department sorted by the ascending fringe variance; i.e. least to greatest fringe variance. Purple=projected deficit. Green=projected surplus.	Drills tabular charts at bottom of dashboard
Fringe Category Totals (Tabular)	Displays the selected department’s fringe balances by fringe rate category.	Category Totals by Account
FTE on Fringe Reimbursable Accounts (Tabular)	Displays the most current pay period FTE by fringe rate category vs. the prior year pay periods FTE and variances.	N/A
Category Totals by Account (Tabular)	Displays the fringe balances by the selected department’s state-support fringe reimbursable accounts.	Account Object Code Totals
Account Object Code Totals	Displays fringe balance breakdown by object code of the selected department.	N/A

Research Dashboards

The Research dashboards have been developed to assist the University community in reviewing sponsored research related trends by fiscal year, sponsor type and agency. The suite of research dashboards can be accessed by click on the “Research” button located on the UMDashboards Launcher.





UMD Funding: Proposals, Awards, Expenditures



Overview & Purpose:

The UMD Funding: Proposals, Awards, Expenditures dashboard visualizes a division and/or departments proposal, awards and expenditure YTD totals by period in comparison to the 3-year trailing average.

The purpose of this dashboard is to aid in the review and analysis of the current, fiscal year’s proposals, awards and expenditures performance vs. the 3-year trailing average. If the purple, “Period Totals” trendline rises above the blue, “Avg Prev 3FY (Metric Type)” trendline for the current or previous fiscal periods than the selected division and/or units are exceeding the 3-year trailing average; vice-a-versa if the purple trendline falls below the blue trendline.

Available Filters:

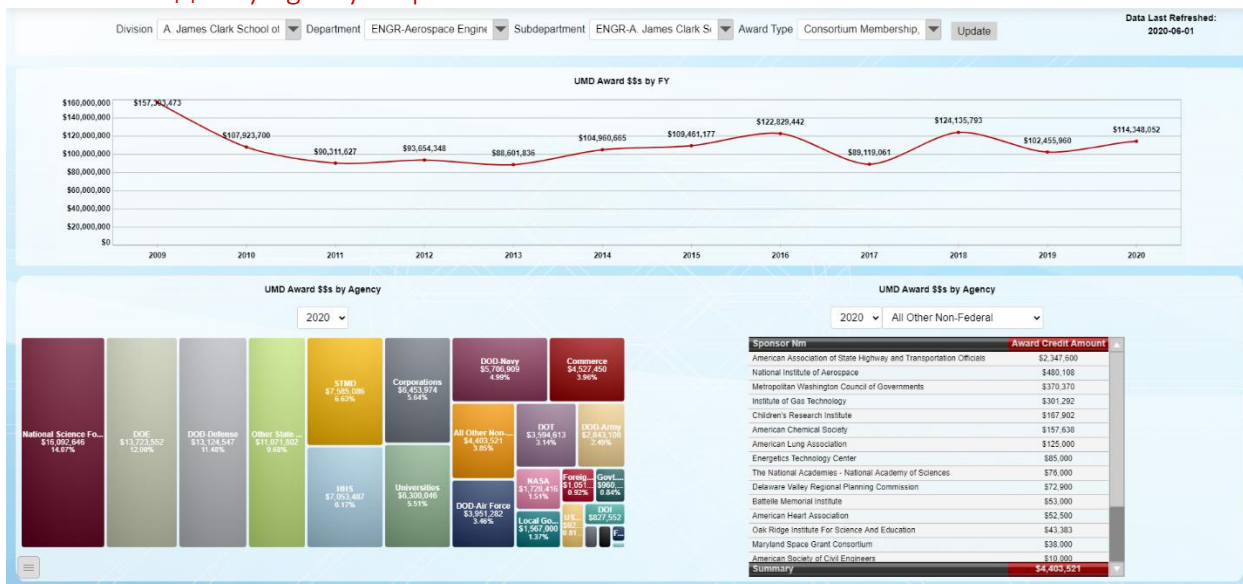
1. Division
2. Department

Overview of Charts:

Chart Name	Chart Description	Drills To?
Kualii Research Proposals (Line Chart)	Displays the current fiscal period aggregate proposal totals “Period Totals” by fiscal period vs. the average previous three fiscal year proposal totals “Avg Prev 3FY Prpls” by fiscal period.	Matching period to Funding Totals to on the right
Kualii Research Awards (Line Chart)	Displays the current fiscal period aggregate award totals “Period Totals” by fiscal period vs. the average previous three fiscal year award totals “Avg Prev 3FY Prpls” by fiscal period.	Matching period to Funding Totals to on the right
Kualii Research Expenditures (Line Chart)	Displays the current fiscal period aggregate expenditure totals “Period Totals” by fiscal period vs. the average previous three fiscal year expenditure totals “Avg Prev 3FY Prpls” by fiscal period.	Matching period to Funding Totals to on the right



UMD Award \$\$'s by Agency & Sponsor:



Overview & Purpose:

The UMD Award \$\$'s by Agency & Sponsor dashboard features the division and or department award totals and trend by fiscal year. Users can drill into a fiscal year to plot a treemap of the fiscal year totals by agency. Click on any of the agency boxes will fire a bar chart of the sponsors comprising the agency totals. Click on any sponsor \$\$ bar and to drilldown into a tabular chart listing the investigator splits and awards comprising the sponsor totals.

Available Filters:

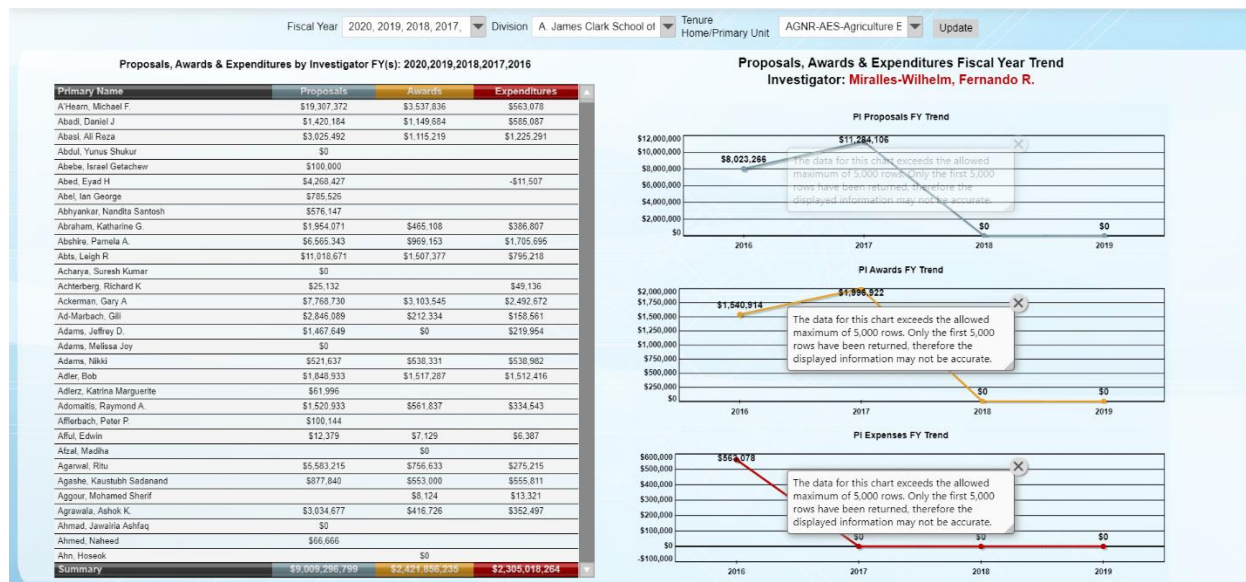
1. Division
2. Department
3. Subdepartment
4. Award Type

Overview of Charts:

Chart Name	Chart Description	Drills To?
UMD Award \$\$'s by FY (Line Chart)	Displays the fiscal year award totals by division(s) and/or department(s) selected	UMD Award \$\$'s by Agency
UMD Award \$\$'s by Agency (Tree map)	Plots agency totals by the selected fiscal year.	Awards: FY
Award \$\$'s: FY (Bar Chart)	Visualizes sponsor totals by the selected agency and fiscal year.	UMD Award \$\$'s by Sponsor Faculty Details
UMD Award \$\$'s by Sponsor Faculty Details (Tabular Chart)	Displays investigator award totals by the selected sponsor and fiscal year with account number, title and department.	Expands with details.



UMD PI Research Metrics:



Overview & Purpose:

The UMD PI Research metrics visualizes the total proposals, awards and expenditures for the following investigators by their tenure home (if Tenured or Tenure Track) or by the employee’s primary unit. The totals reflected are the applicable credit splits at the investigator level rolled up to the investigator’s tenure home or primary unit.

The purpose of this dashboard is to gain insight into an investigator’s productivity across campus in the selected fiscal year(s). Users can click on a faculty or staff name on the tabular char to visualize the investigator’s proposal, award and expenditure fiscal year trends.

Available Filters:

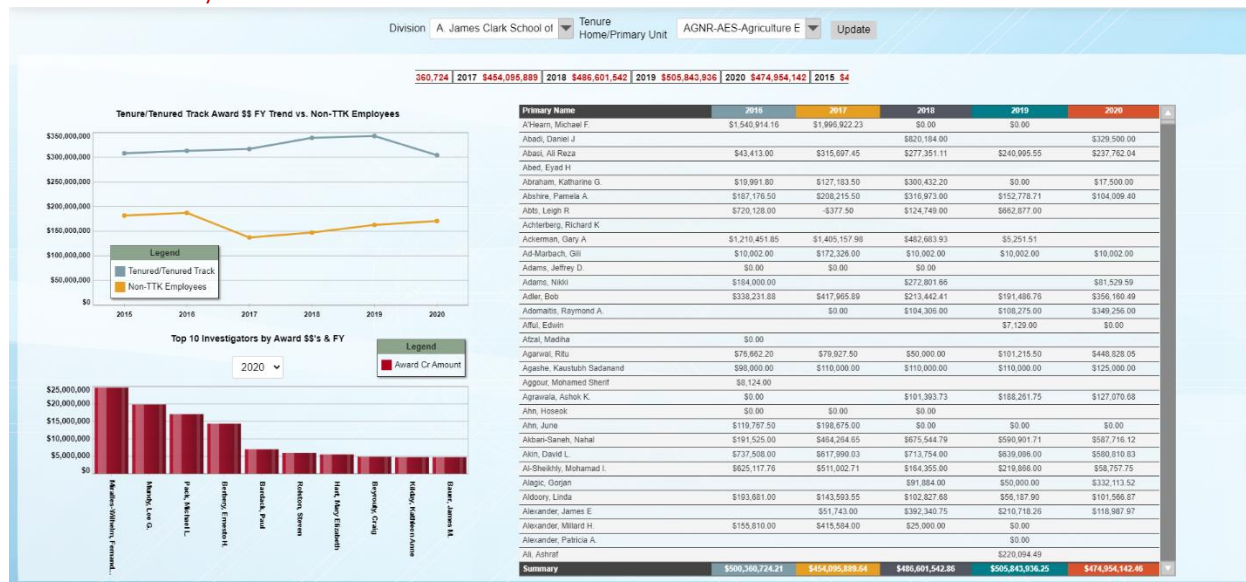
1. Fiscal Year
2. Division
3. Tenure Home/Primary Unit

Overview of Charts:

Chart Name	Chart Description	Drills To?
Proposals, Awards & Expenditures by Investigator FY(s) (Tabular)	A tabular chart displaying an investigator’s proposal, award and expenditure totals by the selected fiscal years.	PI Proposals FY Trend PI Awards FY Trend PI Expenses FY Trend
PI Proposals FY Trend (Trend line)	Displays an investigator’s proposal \$\$’s by fiscal year.	N/A
PI Awards FY Trend (Trend line)	Displays an investigator’s award \$\$’s by fiscal year.	N/A
PI Expenses FY Trend (Trend line)	Displays an investigator’s expenditure \$\$’s by fiscal year.	N/A



UMD Awards by PI:



Overview & Purpose:

The UMD Awards by PI displays the total awards for the following investigators by their tenure home (if Tenured or Tenure Track) or by the employee's primary unit.

The purpose of this dashboard is to gain insight into an investigator's productivity across campus in each fiscal year.

Available Filters:

1. Division
2. Tenure Home/Primary Unit

Overview of Charts:

Chart Name	Chart Description	Drills To?
Tenure/Tenured Track Award \$\$ FY Trend vs. Non-TTK Employees (Line Chart)	This line chart displays the trend of TTK vs. Non-TTK employees' award total FY trend by the selected division and/or unit.	Top 10 Investigators by Award &&'s & FY
Top 10 Investigators by Award &&'s & FY (Bar Chart)	This bar chart displays the top 10 investigators by award credit dollars in the selected fiscal year.	N/A
Award \$\$'s by Investigator & FY (Tabular Chart)	This tabular chart displays all investigators with their tenure home or primary unit within the selected division and/or primary unit. Users can sort this chart by column by click on any fiscal year.	Investigator Name Award \$\$'s FY Trend
Investigator Name Award \$\$'s FY Trend (Line Chart)	This line chart displays the selected investigators award credit dollars by fiscal year.	Investigator Name Awards FY
Investigator Name Awards FY: (Tabular Chart)	This tabular chart displays the sponsor type name, account number, sponsor, sponsor name award title, which comprise the selected fiscal year chosen in the previous chart.	Expands to reveal award details.



UMD Credit Split Analysis:



Overview & Purpose:

The purpose of the UMD Credit Split Analysis dashboard is to investigate and visualize collaborated research on awards by allowing users to select parent awards administered in their units and identify all investigators with credit splits on the award. Users can filter the dashboard by project start date, fiscal year, department and subdepartment. The top, tabular chart will list all the awards by the parent account number in the chosen unit(s). The text frame to the right of the top tabular chart lists the totals and percentages of the awards credited within the unit and the awards credited outside the unit. There is a drilldown report connected to this text frame which will open a new browser window with a list of the credit award splits outside the chosen unit. Click on a parent award account on the top, tabular chart and it will filter the below tabular chart at the bottom of the dashboard listing all child/subawards connected to the parent award account.

Available Filters:

1. Project Start Date
2. Fiscal Year
3. Division
4. Department
5. Subdepartment

Overview of Charts:

Chart Name	Chart Description	Drills To?
FYXXXX Award Splits by Selected Unit (Tabular)	Displays the selected unit parent award totals with project start/end dates, award title, agency, sponsor name and award amount.	FYXXXX Parent Award:XXXXXX Award Splits
FYXXXX Parent Award:XXXXXX Award Splits (Tabular)	Lists all child/subawards related to the chosen parent account award selected in the above tabular chart.	N/A
Outside Unit Credit Split Award Totals (Text)	Lists all outside unit credit splits by award with investigator, subdepartment, award title, KFS account and award credit amount.	Report listing award totals outside unit



Additional Functionality

Dashboard Navigation

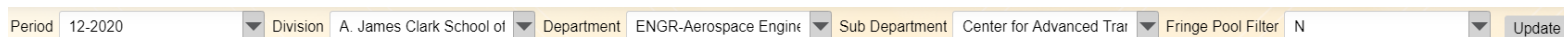
Navigating the dashboards in the HTML interface is very similar to navigating the dashboards in the Flash interface.

Filters & Drilldowns

Most of the dashboards will contain filters and drilldowns, which allow users to visualize a subset of the data presented on the dashboard. For example, most dashboards contain filters to present data by a specific department, sub department, account category, etc. Filters and drilldowns are useful tools to narrow down the data represented on the dashboard to better identify opportunities and analyze metrics to measure performance.

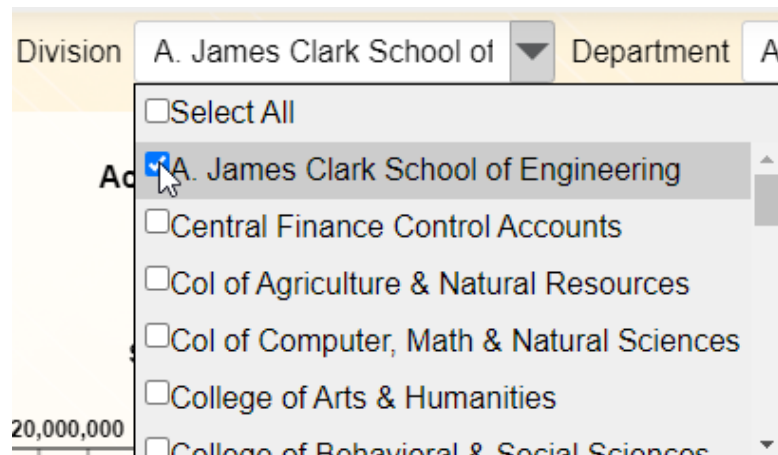
Dashboard Filters:

Most dashboard filters can be viewed and changed at the top of the dashboard. Dashboard filters are often defaulted to either all items or the first item available. For example, department dashboards will most often be filtered by the first department displaying in the data filter subset. The following is an example of a dashboard with 3 filters: Department, Sub Department and Subfund Group:

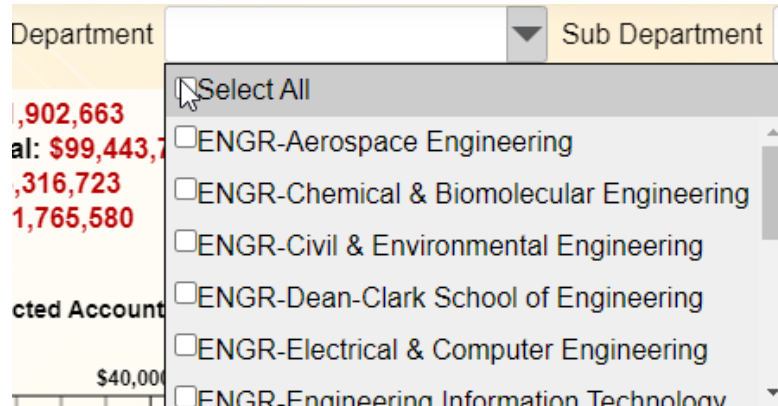


1. Editing or Changing Filters:

- a. Start from by changing filters from left to right. Click anywhere on the filter to display filter values:



- b. Unselect the default filter value by unchecking the box.



- c. Select the filter value you would like to view.



Department ENGR-Aerospace Engine Sub Department

Select All
 ENGR-Aerospace Engineering
 ENGR-Chemical & Biomolecular Engineering
 ENGR-Civil & Environmental Engineering
 ENGR-Dean-Clark School of Engineering
 ENGR-Electrical & Computer Engineering
 ENGR-Engineering Information Technology

- d. Repeat these steps for any other filters you would like to change on the dashboard.
- e. Click Update to refresh the dashboard.



Sub Department ENGR-Aerospace Engine Fringe Pool Filter N Update

****TIP – When changing filters multiple times, ensure each filter is properly selected as filters have automatically been changed based upon previous selections.****

Dashboard Drilldowns:

Dashboards may contain drilldown functionality which allows users to drill into the data comprising the previous chart. For example, a drilldown may show the object code breakdown comprising the object level totals on a specific account (i.e., totals by object code for Travel). Drilldowns can also be referred to as pivots where pivots will update related charts on the dashboard with a simple click.

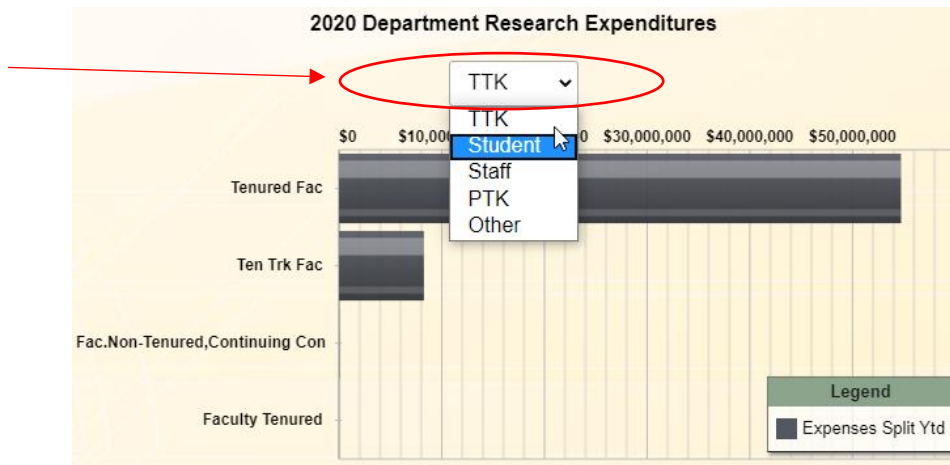
1. Identifying Drillable Charts:

To identify charts with drilldowns simply hover your mouse over the chart. If your mouse arrow  becomes a hand  then the chart you've selected contains drilldown functionality.

2. Drilling or Pivoting:

When the hand appears simply click on the value in which you would like to drill or pivot. When a chart contains a drilling function it will be replaced in the same dashboard window by another chart; with a pivot a related chart on dashboard will be changed by the value selected.

Pivot Example:



Drilldown Example: Select “University of Delaware” which drills into University agency FY 2020 details.

UMD Award \$\$s by Agency

2020 Universities

Sponsor Nm	Award Credit Amount
The Ohio State University	\$680,647
University of Texas Medical Branch at Galveston	\$670,672
University of Delaware	\$532,953
Johns Hopkins University	\$407,726
Morgan State University	\$385,700
University of New Mexico	\$361,498
The University of Chicago	\$326,286
The Regents of the University of California - Irvine	\$319,210
Board of Trustees of the University of Illinois	\$247,070
University of Houston System dba University of Houston	\$214,841
Massachusetts Institute of Technology	\$210,684
North Carolina State University	\$200,000
University of Pennsylvania	\$199,096
Summary	\$6,601,328

Drilldown chart results in the details comprising the totals from the previous chart.

2020 Universities University of Delaware

UMD Award \$\$s by Sponsor Faculty Details

Expand All Collapse All

Name	Account Nbr	Title	Dept	Credit Amount
Robert M. Briber				\$208,447
	4329822	Mid-scale RI:1 (M1:IP): A world-class Neutron Spin Echo Spectrometer for the Nation	ENGR-Materials Science & Engineering	\$208,447
Yang Tao				\$108,416
Dongxia Liu				\$90,000
Ben Woodard				\$126,089
Deborah Sweet Goldberg				\$0
Gregory F. Payne				\$0
William E. Bentley				\$0
Summary				\$532,953



3. Drilling Back or Returning to Previous Chart:

To “Drill Back” to the previous chart select the back button located in the bottom left hand of the drilldown chart:

2020 Universities University of Delaware

UMD Award \$\$s by Sponsor Faculty Details

Expand All Collapse All

Name	Account Nbr	Title	Dept	Credit Amount
Robert M. Briber				\$208,447
	4329822	Mid-scale RI:1 (M1:IP): A world-class Neutron Spin Echo Spectrometer for the Nation	ENGR-Materials Science & Engineering	\$208,447
Yang Tao				\$108,416
Dongxia Liu				\$90,000
Ben Woodard				\$128,089
Deborah Sweet Goldberg				\$0
Gregory F. Payne				\$0
William E. Bentley				\$0
Summary				\$532,953

Saving Dashboards & Charts as HTML or PDF Report

Dashboards and charts can be saved as .pdf report. To save a dashboard as a .pdf report follow these steps:

Saving Dashboard as HTML/PDF:

Settings

- Refresh Dashboard
- Add as Favorite
- Enter Dashboard Parameters
- Export All Chart Data
- Save Dashboard Screenshot
- View Dashboard as Report**

Viewing & Exporting Chart Data

A user can easily view the data used to develop the charts contained on the dashboard. Viewing the data allows the user to see the data in a table. Exporting the chart data will result in .csv download.



Viewing Chart Data:

1. To view chart data where applicable, click on the hamburger menu in the bottom left corner of

the chart and choose “ View Chart Data”:

Tran Object Type	Object Level	Object Code	State App Revenue	Non-Base Revenue YTD	Transfers YTD	Expenses YTD	Encumbrances	Current Fund Balance	Revised Budget	Budget Balance Available
Expenses			\$0	\$0	\$0	\$2,389,199	\$293,868	\$0	\$2,788,469	\$105,403
Fund Balance			\$0	\$0	\$0	\$0	\$0	\$336,496	\$0	\$0
Transfers			\$0	\$0	-\$627,886	\$0	\$0	\$0	-\$691,715	-\$63,829
Revenues			-\$2,096,754	-\$1,054	\$0	\$0	\$0	\$0	\$0	\$1,054
Summary			-\$2,096,754	\$1,054	-\$627,886	\$2,389,199	\$293,868	\$336,496	\$2,096,754	\$42,628

2. A window with a table of the chart data will appear. To Export Data, you must choose the Export Chart Data option available in the chart’s hamburger menu options.

Tran Object Type	Object Level	Object Code
Expenses	Communications	3210-Postage and
Expenses	Contractual Services	3746-Food Service
Expenses	Contractual Services	3752-Other Contra
Expenses	Contractual Services	3880-Administrati
Expenses	Contractual Services	3884-Administrati
Expenses	Fringe Benefits	2740-Faculty Fring
Expenses	Fringe Benefits	2745-Limited Emp
Expenses	Fringe Benefits	2746-Legislated Er
Expenses	Fringe Benefits	2747-Legislated Er
Fund Balance	Net Position	8100-Net Position
Fund Balance	Net Position	8999-RECV OITST

Exporting Chart Data:

To export a chart’s data follow these steps:



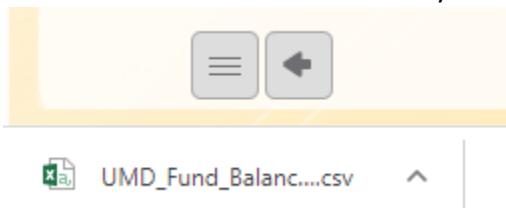
1. Where applicable, click on the hamburger menu in the bottom left corner of the chart and

choose “View Chart Data”:

The screenshot shows a dashboard with a table of financial data. A red arrow points from the text 'choose “View Chart Data”:' to a hamburger menu icon in the bottom left corner of the chart area. Below the chart, a dropdown menu is open, showing the following options: 'View Chart Data', 'Export Chart Data', 'View Chart as Report', and 'Chart Data Diagnostics'. The 'View Chart Data' option is highlighted. Below the dropdown menu are two icons: a hamburger menu icon and a back arrow icon.

Trans Object Type	Object Level	Object Code	State App Revenue	Non-Base Revenue YTD	Transfers YTD	Expenses YTD	Encumbrances	Current Fund Balance	Revised Budget	Budget Balance Available
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Summary			-\$2,096,754	-\$1,054	-\$627,886	\$2,389,199	\$293,868	\$336,496	\$2,096,754	\$42,628

2. The chart’s data should immediately start to download. In the Chrome browser the .csv file should be available at the bottom of the browser window as shown below. Alternatively, you should be able to retrieve the file in your Downloads folder.



Support Contact

The dashboards are administered and supported by the Dashboards & Analytics team. To contact us please visit the Contact page on our website: <https://analytics.umd.edu/contact/> or email us at dashboards@umd.edu.