

# AGDASHBOARDS USER MANUAL

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





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# AGNR iDashboards User Manual

### **General Instructions**

### Logging Into iDashboards

Click on or copy and paste the following URL in your browser of choice: <u>https://agnrdashboards.umd.edu/idashboards/</u>

Bookmark: add the site as a bookmark or favorite:

- a. Chrome (Preferred):
- i. Bookmark icon 🛠



ii. Name the Bookmark and click Done:

Bookm	nark added		
Name:	AGNR - iDashb	oards	
Folder:	Bookmarks bar		
	Remove	Edit	Done

b. Internet Explorer:



ii. Click "Add to favorites", name bookmark and click "Add"





Enable Flash: You may be required to enable Flash on your browser. Click Enable or Install Flash Plugin.

Oops.. We detected that your Adobe Flash Player plugin is either not installed or currently disabled for this URL. For the best user experience with this application we recommend enabling your Adobe Flash Player plugin. Click to Enable or currently disabled for this URL. For the best user experience with this application we recommend enabling your Adobe Flash Player plugin. Click to Enable or currently disabled for this URL. For the best user experience with this application we recommend enabling your Adobe Flash Player plugin. Click to Enable or currently disabled for this URL. For the best user experience with this application we recommend enabling your Adobe Flash Player plugin. We also offer a full HTMLS version that will allow you to view the dashboards in the web browser without the use Flash.

User Credentials: Enter in your UMD directory ID and password. iDashboards uses single-sign on authentication. Click Login.

iDashboards	Login
Username:	fakeuser
Password:	*****
Log in auto	omatically
	Login

\*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 David Kenny – <u>dkenny82@umd.edu</u>.

### **User 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.

Accessing User Settings: The User Settings window can be access by selecting the Menu button located in the bottom left of the iDashboards application:







The User Settings window can also be accessed by clicking the User Settings QuickStart icon located in the bottom right hand corner of the application:



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:

Click the Select button	to specify your startup das	hboard:
User Settings	×	
Language	English   •	
Skin	Soft Green   🔻	
Dashboard List Mode	System Default   •	
Dashboard List Style	System Default   -	
Dashboard List Position	System Default   -	
Dashboard Transition	System Default   -	
Category Sort Order	Server Order	
Startup Dashboard	Select.	$\supset$
Data Source Caching (minutes)		
Periodically check for new alerts	$\checkmark$	
Minutes between checks (1-60)		
Receive alert notifications by email	$\checkmark$	
Receive alert notifications by SMS		
Email Address	dkenny82@umd.edu	
SMS Country Code		
SMS Phone Number		
SMS Carrier		
Long Message Behavior	System Default   🔻	
Change Passwo	rd Save Cancel	

1. Menu  $\rightarrow$  User Settings  $\rightarrow$  Startup Dashboard Click the Select button to specify your startup dashbo

A navigation similar to Windows Explorer will appear.
 Choose: AGNR: Department Dashboards → AGNR Department Dashboard Launcher and click OK.

Select a Startup Dashboard			×
Categories			Dashboards
Personal	•		AGNR Department Awards
AGNR: Academics		L	AGNR Department Budget Tool (SQL DB)
AGNR: Assistant Dean's Office	-		AGNR Department Dashboard Launcher
AGNR: Dean	L	Į.	AGNR Department Expenses & Encumbrances (SQL I
AGNR: Department Dashboards	I.	Ľ	AGNR Department Rev & Exp Dashboard (SQL DB)
AGNR: Dev-DK	1	L	AGNR Faculty and Staff Budget
AGNR: Dev-JV	1	L	
AGNR: Financial	E	L	
AGNR: MasterGardener	Ŧ	Ŀ	
Q Search for Dashboard			
AGNR Department Dashboard Launcher The selected dashboard will be automatically loaded when you log into iDashboards.			
Use Current	Cle	ear	r OK Cancel



- 3. Click the Save button at the bottom of the User Settings.
- 4. Refresh your browser or log out and log back in to verify that your newly defined Startup Dashboard is working.

### User Setting QuickStart Icons:

Located in the bottom right corner of the application are 6 QuickStart icons which will allow you to quickly access: Reports, Magnify (zoom), Mouse Over Pie Analyzer, User Alerts (not currently used), Refresh and User Settings.



### Reports Icon: Report

Left-click: new browser window will open with PDF report. Right-click: user is provided the option of selecting either an HTML or PDF report output

HTML	
PDF	20
Settings	
Global Settings	
Check for Updates	
About Adobe Flash Player 2	26.0.0.151

Magnify Icon: Magnify

A user can adjust the zoom on the dashboard when click on the Magnify icon. User the "+" and "-" to zoom in and out.





### Mouse Over Pie Analyzer:

Click on the Mouse Over Pie Analyzer icon to enable the ability to hover a chart and for the X-axis Value hover over, see the Y-axes relative percentages. This functionality is NOT available on all charts as the Y-axis must contain at least one numeric value.





## Refresh: 😳

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:







Click on the user settings QuickStart icon to access the user settings window with one click.

User settings	^
Language	English   •
Skin	Soft Green   V
Dashboard List Mode	System Default   •
Dashboard List Style	System Default   •
Dashboard List Position	System Default   -
Dashboard Transition	System Default   -
Category Sort Order	Server Order   •
Startup Dashboard	AGNR: Dean::AGNR Strategic Planning Select
Log in automatically	
Data Source Caching (minutes)	
Periodically check for new alerts	
Minutes between checks (1-60)	
Receive alert notifications by email	V
Receive alert notifications by SMS	
Email Address	dkenny82@umd.edu
SMS Country Code	
SMS Phone Number	
SMS Carrier	
Long Message Behavior	System Default
Long hebbuge benation	oystem berdan
Change P	assword Save Cancel

### **Opening Dashboards**

There are several ways to open dashboards including designating a startup dashboard, utilizing the bookmark feature, using the recently opened feature or simply navigating to the category which contains the dashboard.

### 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. Navigate to a category, i.e. AGNR: Department Dashboards, click on the category name or down arrow and select a dashboard which you would like to view:



AGNR: Department Dashboards
AGNR Department Dashboard Launcher
AGNR Department Rev & Exp Dashboard (SQL DB)
AGNR Faculty and Staff Budget
AGNR Department Expenses & Encumbrances (SQL DB)
AGNR Department Budget Tool (SQL DB)
AGNR Department Awards
AGNR: Department Dashboards
AGNR Department Dashboard Launcher
AGNR Department Rev & Exp Dashboard (SQL DB)
AGNR Department Rev & Exp Dashboard (SQL DB)
AC
AGNR Faculty and Staff Budget

### **Bookmarks:** Adding a Bookmark:

- 1. Similar to adding internet browsing bookmarks, <u>first open the dashboard</u> in which you would like to add as bookmark.
  - a. To add a bookmark click the star located in the top left of the



Accessing Bookmarks: Click on the star icon at the top left of the iDashboards application and click on the dashboard you'd like to view:



Managing Bookmarks: Bookmarks can be managed by again navigating to the star icon and selecting Manage Bookmarks. From there you can reorder or delete your bookmarks:





Manage Bookmarks	×
AGNR: Department Dashboards::0 - AGNR Department Dashboard Laur AGNR: Dev-DK::AGNR Directory	cher
1 Delete OK Cancel	

### Recently Opened Dashboards:

A user can access the ten (10) most recently accessed dashboards by click on the Menu button located in the bottom left hand corner and selecting Recent Dashboards:



### Dashboard Navigation

There are multiple options to navigate dashboards using the Dashboard List Mode, Dashboard List Style and Dashboard List Position features.

### Accessing Dashboard Navigation Options:

- 1. Click on the "i" icon located at the top right of the application:
- 2. Then choose the dashboard navigation option you would like to modify:





### Summary of Navigation Options:

- 1. Dashboard List Mode:
  - a. Text (default) Dashboard Categories will be viewable as text.
  - b. Preview dashboard name and dashboard thumbnails are enabled, displaying images of the dashboards.



- 2. Dashboard List Style: Unopened dashboards can be displayed in two different ways: Category & Dashboard.
  - a. Category (default): dropdown list across the top of the application screen for each category with a list of the dashboards available in each category.
  - b. Dashboard: each available dashboard is listed individually across the top of the application. Sort order can be set under Category Sort Order.



- 3. Dashboard List Position: A User can select which position the dashboard list should be displayed within the application. The available options:
  - a. Top (default)
  - b. Left
  - c. Right





### 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 will 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:

Department AGNR-Agricultural & Resource I - Sub	ib Department AGNR-Agricultural & R 👻	Subfund Group Agency,	Non-Budgeted,Cost Sh 👻	Update
---	---------------------------------------	-----------------------	------------------------	--------

- 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	AGNR-Agricultural Experiment 5 - Sub De	epart
	Select All	-
	AGNR-Agricultural & Resource Econ	=
d To View	AGNR-Agricultural Experiment Station	
esource E	GRAGNR-Animal & Avian Sciences	
14. A.	AGNR-Communication & Information Te	•

d. Repeat these steps for any other filters you'd like to change on the dashboard.



e. Click Update to refresh the dashboard.



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

#### 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  $^{\textcircled{1}}$  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 Exam	nple:			
			2 miles	
Cardina 1 Take				
Total	Expenses: \$379,393			A CARLES AND A CARLES AND A CARLES
Iotai	Expenses. \$579,555			
		Trave	Land and the state of the state of the	,
ALC: NO.			source Econ Account T	otals by Object Level Ty
(E) Expand All	Collapse All		esource <mark>Econ</mark> Account T	otals by Object Level Ty
Expand All     C     Account Nbr	Collapse All			otals by Object Level Ty
		AGNR-Agricultural & Re	esource Econ Account Tr Revised Budget \$30,524	and a strength of the
Account Nbr		AGNR-Agricultural & Re	Revised Budget	Actual Fiscal Year
Account Nbr 1102000		AGNR-Agricultural & Re Original Budget \$30,524	Revised Budget \$30,524	Actual Fiscal Year \$0
Account Nbr		AGNR-Agricultural & Re Original Budget \$30,524 \$0	Revised Budget \$30,524 \$0	Actual Fiscal Year \$0 \$6,444
Account Nbr 1102000 1102010 1102070		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000	Revised Budget \$30,524 \$0 \$3,000	Actual Fiscal Year \$0 \$6,444 \$0
Account Nbr 1102000 1102010 1102070 1102070 1102100		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$0	Revised Budget \$30,524 \$0 \$3,000 \$0	Actual Fiscal Year \$0 \$6,444 \$0 \$2,839
Account Nbr 1102000     1102010     1102010     1102070     1102100     1102110		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$3,000 \$0 \$0 \$0	Revised Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0	Actual Fiscal Year \$0 \$6,444 \$0 \$2,839 \$0
Account Nbr 1 1102000 1 1102010 1 1102070 1 1102100 1 1102110 1 1102140		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$0 \$19,500	Revised Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$19,500	Actual Fiscal Year \$0 \$5,444 \$0 \$2,839 \$0 \$9,708
Account Nbr 1102000 1102010 1102070 1102100 1102110 1102140 1108400		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$19,500 \$6,000	Revised Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$19,500 \$6,000	Actual Fiscal Year \$0 \$6,444 \$0 \$2,839 \$0 \$9,708 \$64
Account Nbr 1 1102010 1 1102070 1 1102070 1 1102170 1 1102110 1 1102110 1 1102140 1 1108400 2 9440040		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$0 \$19,500 \$6,000 \$27,000	Revised Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$19,500 \$6,000 \$27,000	Actual Fiscal Year \$0 \$6,444 \$0 \$2,839 \$0 \$9,708 \$64 \$1,514
Account Nbr 1 1102000 1 1102010 1 1102070 1 1102070 1 1102100 1 1102110 1 1102140 1 11024400 1 2940040 1 2956809		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$0 \$0 \$0 \$19,500 \$6,000 \$27,000 \$18,358	Revised Budget           \$30,524           \$0           \$3,000           \$0           \$0           \$0           \$0           \$0           \$0           \$0           \$0           \$0           \$19,500           \$6,000           \$27,000           \$18,358	Actual Fiscal Year \$0 \$6,444 \$0 \$2,839 \$0 \$9,708 \$564 \$1,514 \$6,819
Account Nbr 1 1102010 1 1102070 1 1102100 1 1102100 1 1102110 1 1102140 1 1102140 1 1102400 1 2940040 1 2956809 1 4300370		AGNR-Agricultural & Re Original Budget \$30,524 \$0 \$3,000 \$0 \$0 \$19,500 \$6,000 \$27,000 \$18,358 \$0	Revised Budget           \$30,524           \$0           \$3,000           \$0           \$0           \$0           \$0           \$0           \$0           \$0           \$0           \$0           \$19,500           \$6,000           \$27,000           \$18,358           \$0	Actual Fiscal Year \$0 \$6,444 \$0 \$2,839 \$0 \$9,708 \$54 \$1,514 \$6,619 \$0





Drilldown Example: Select year 2014 Award details for a faculty member.

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

	Abani K Pradhan 🕨 2014	>
Expand All Collapse	All	
Coeus Agency	Coeus Sponsor Award	Tille Credit Amount
🕀 USDA		\$199,978
Summary		\$199,978
	The Real Property of the Real	And the second se

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:





### 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:

- 1. Right click on any chart on the Dashboard.
- 2. Choose More Options:



3. Under More Options choose View Dashboard as Report and choose: PDF or HTML



#### Saving Chart as PDF:

- 1. Right click on any chart on the Dashboard.
- 2. Click on View Chart as Report:



	Chart Data	
	Chart Designer	
<	View Chart as Report	

3. A PDF Report will display. If the chart contains a large dataset it may take a minute or two for the PDF to be generated:

Expenses by	Object Level
Fin Obj Level Nm	Actual Fiscal Year Expenses
Accounts Receivable, net	\$0
Capital Equipment	\$3,596,084
Cash and Cash Equivalents	\$0
Communications	\$19,998

### Print Dashboard:

A dashboard can be printed by:

1. Clicking on the Menu button located in the bottom left corner of the dashboard.





2. Select Print Dashboard... and a print window should be launched.

New Dashboard
Open Dashboard
Recent Dashboards
Save Dashboard
Save Dashboard As
Save Dashboard and Charts
Extended Dashboard Properties
Define Dashboard Parameters
Enter Dashboard Parameters
Dashboard Designer
Startup Dashboard
Dashboard Report Properties
View Dashboard as Report
Configure Report Schedules
Print Dashboard
Delete Dashboards
Delete Charts
Color Palettes
Picklists
Report Themes
User Settings
Log Out

### 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, right click anywhere on a chart and choose Chart Data:

New Chart		
Open Chart		
Save Chart		
Save Chart As		
Close Chart		
 Chart Data	N	$ \longrightarrow $
	15	

2. A window with a table of the chart data will appear. You can export the data from this window by click the Export button at the bottom of the window:



Fin Obj Cd Nm	Actual Fiscal Yea	Fin Obj Level Nm	
Business Meals	2945.69	Travel	-
Conference Fees	825	Travel	1
Faculty Recruitm	0	Travel	- 11
Foreign Travel	420322.4699999	Travel	- 11
In State Travel	150174.6399999	Travel	- 11
Out of State Trav	1058467.500000	Travel	- 11
Travel Card Rece	700	Travel	- 11
Award Revenue I	0	Federal Grants and Contracts	- 11
Contracts and Gr	0	Federal Grants and Contracts	- 11
Indirect F&A Cos	0	Federal Grants and Contracts	- 11
Award Revenue (	0	Nongovernmental Grants and Contracts	- 11
Gift Revenue fror	0	Nongovernmental Grants and Contracts	- 11
Indirect F&A Cos	0	Other Operating Revenue	- 11
Operating Expen:	8	Peol	•

### Exporting Chart Data:

1. Another method to export chart data, right click anywhere on a chart and choose Export Data:



2. The export will automatically occur and will appear at the bottom of your browser if you're using Google Chrome:





### Overview of Available AgDashboards

The AgDashboards Department dashboards were developed by a collaborative team comprised of both 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: BPM, KFS, PHR and Coeus.

### **Department Dashboards**

The AgDashboards Department dashboards were modeled using reports developed by Agricultural & Resource Economics. Each dashboard tells a different story aimed at identifying opportunities, facilitating productive conversations and assisting in planning.

### AGNR Department Rev & Exp Dashboard:



This dashboard provides an overview of your department's State, Federal Formula, and County Appropriation accounts during the current fiscal year (FY):

- 1. Revised Budget Total
- 2. Expenditures YTD
- 3. Budget Balance Available

Use the filter at the top to filter by department.

There is a bar chart at the top representing the two different account types:

- 1. State Supported Funds
- 2. Federal Formula & County Appropriation Funds.



When you click on an account type in the bar chart, the table below will update with the expense details for those accounts. Drill down capabilities allow review at the group object and object code levels.

#### Dashboard Use Cases:

Your chair received a lab upgrade request from a faculty member and would like you provide the fiscal analysis necessary to make this funding allocation decision. Specifically your Chair has asked you to provide an overview of the department's current FY budget, how that is split up between your various accounts, and current fund balance in order to assess this funding request. Use this dashboard to present this information to your Chair.



### AGNR Faculty and Staff Budget:

This dashboard provides you detailed information about filled and vacant positions in your department. Use the filter at the top to filter by department. There are two pie charts at the top that provide an overview of filled and vacant:

- 1. Salary Budget
- 2. FTE

Click on a pie slice to refresh the chart below that will provide you detailed information about both filled and vacant positions. When expanding the employment category rollup, you will be able to view the details of each position including: the employee's name, position number, total FTE, budget by accounts and the person's appointment salary.

### Dashboard Use Cases:

 The Dean has asked the Department Chairs to update their five year faculty staffing plan. Your Chair has provided you the faculty's list of needed positions and pending retirements and has asked you to identify when each position can be filled and what impact that will have on departmental spending trends. Your Chair has also asked that you identify if and when



additional funds will need to be requested to implement this staffing plan. You will also need to identify changes to the staffing plan if no additional funds are received.

2. The AGNR fiscal office recently announced that they will soon start randomly auditing departments to ensure that PHR salary allocations match BPM salary allocations. Your Chair has asked you to use this Dashboard to show that all your departmental salary allocations in PHR and BPM match, and to provide an explanation for when they do not.



### AGNR Department Expenses & Encumbrances:

AGRICULTURE & Department AGNR	Agricultural & Resource I - St	ub Department AGNR-Agric	ultural & F 👻 Subfund Gn	oup Agency, Non-Budgeted	Cost  Update	Data Last Refre 8/3/17
" State State State	Su	bfund Group Reference	Guide			
inte Sala	ct - State Operating To Vie	w: Federal Formula & C	ounty Appropriation Ac	counts Select -		
and the second s	The All And All All All All	W. I cuciari ornidia di Ci				
AGNR-Agricultural & Resource Ec	on Expenses	State 📶	AGNR-A	gricultural & Resource E	con Encumbrances	
	and the state of the			Http		
	wspecialization				and the second	
Salaries & Wages	Travel				Travel	
Cont	rictual Services	and the second second	Salar	les & Wages	Contractual Services Fixed Charges	
	sidy/Distribution	Service and an	and the second second		Pixed Charges	
	and Structures	and the second	and the second			
		and the set of the	ALTA WARNESS			
ALC: YOU WANTED THE ALC: Y		A second second			and the second	
Tatal European COS	0.004					
Total Expenses: \$22	8,864		lota	al Encumbrances	: \$2,009,834	
	Salar	ies & Wages	,			
	AGNB-Agricultural & B	esource Econ Account T	otals by Object Level Ty	Ine	and the second second	
Expand All     Collapse All	Addit Agricultura a fi	coource Econ Account i	ours by object Lever ty	ipe -		
Account Nbr Object Code	Original Budget	Revised Budget	Actual Fiscal Year	Encumbrances	Budget Balance Available	
⊕ 1102000	\$1,648,007	\$1,648,007	\$61,093	\$704,618	\$882,296	
Ⅲ 1102010	\$1,610,683	\$1,610,683	\$59,419	\$615,265	\$935,999	1
1102100	\$740,767	\$740,767	\$24,925	\$376,305	\$339,537	Carlo I
⊕ 1102110	\$0	\$0	\$22,416	\$0	-\$22,416	
1102140	\$25,500	\$25,500	\$28,067	\$0	-\$2,567	
0 1102140	1000 March 1000	\$7,500	\$0	\$0	\$7,500	
⊕ 1108000	\$7,500				120001000	
	\$7,500	\$0	\$0	\$0	-\$9,233	
			\$0 \$15,360	\$0 \$25,011	-\$9,233 \$38,741	= [
<ul> <li>         ∃ 1108000      </li> <li>         Ξ 2254470      </li> </ul>	\$0	\$0				
1108000     12254470     2940040	\$0 \$79,112	\$0 \$79,112	\$15,360	\$25,011	\$38,741	
C 1108000 C 2254470 C 2500400 C 256809	\$0 \$79,112 \$8,928	\$0 \$79,112 \$8,928	\$15,360 \$0	\$25,011 \$0	\$38,741 \$8,928	

This dashboard provides a breakdown of departmental expenses and encumbrances for the current fiscal year (FY) by account type and expense category. Use the filters at the top to filter by department and/or subfund\* type. There are two pie charts that provide the breakdown of:

- 1. Expenses
- 2. Encumbrances

Click on a pie slice and the table below will provide you details for that expense category by account.

#### \*Subfund Group Reference Guide:

Subfund Group	Translation
State Operating	State Accounts
Restricted, State Agric	Federal Formula & County Appropriation Accounts
E&G Designated	Revolving Accounts
DRIF	DRIF Accounts

### Dashboard Use Cases:

Your department filled all your vacant faculty positions this FY, so you no longer have any salary savings from those positions to use towards department operating expenses. You have worked with your chair to develop a tight budget for operating expenses, having to decrease normal allocations to travel, supplies, facilities, and other expenses. Your Chair has stressed to you the importance of watching operating expenses closely to ensure the department does not run out of funds to quickly. What can you do to maximize the utility of this Dashboard for this purpose? And how would you train your Chair on its use?





### AGNR Department Budget Tool:

Account Nor Thi Oo Level Nm	Revised Budget	Actual YTD Expenses		Encumbrances		Annualized Act Fiscal Yr Exp		Projected Paperses		
· 1100510	50	S0	Actual YTD Revenues	50	Budget Bat Avail	Annualized Act Piscal IT Exp	30	50	30	Project Bud Bal Avail
1102000	\$1,548,007	\$24,195	\$0	\$706,023	\$917,788	\$145,178	50	\$145,178	\$0	\$796,807
1102010	\$1,592,784	\$66,402	50	\$648,920	\$877,462	\$398,411	\$0	\$398,411	10	\$545,454
1102070	\$3,500	\$0	50	50	\$3,500	50	\$0	\$0	\$0	\$3,500
1102100	5729,086	\$25,059	80	\$393,346	\$310,681	\$150,352	50	\$150,352	\$0	\$105,386
· 1102110	540,000	\$22,416	\$0	\$1,570	\$16,014	\$134,495	\$0	\$134,495	\$0	-\$96,065
1102130	50	50	10	50	50	50	\$0	50	\$0	50
1102140	80	\$37,774	50	80	-\$37,774	\$226,646	80	\$226,646	\$0	-8226,646
1107910	\$0	50	50	80	\$0	\$0	50	\$0	\$0	50
1108000	50	50	50	80	50	50	\$0	50	\$0	50
1108400	50	\$64	\$0	\$1,455	-61,519	\$385	80	\$386	\$0	-\$1,841
2254470	\$0	\$0	10	50	\$0	\$0	50	\$0	10	50
± 2257210	50	\$0	50	50	\$0	50	50	\$0	\$0	50
2256130	\$0 80	\$0 -548,870	\$0	50	\$0 \$46,870	50 -6293,220	\$0 -8293,220	\$0 -\$293,220	\$0 -\$293,220	\$0 \$48,870
± 2831070     ± 2940940	80	-548,870 \$23,961	-548,870	\$32,456	-\$56,417	-6293,220 \$143,766	-6293,220	-8293,220 \$143,766	-5293,220	-\$176,221
1 2940040 2943890	\$0	\$23,961	10	832,408	-559,417	\$143,755	50	5143,799	10	-5176,221 50
· 2056609	50	\$400	10	\$16,276	-\$16.678	\$2,400	50	\$2,400	10	-\$10,670
E 4300370	50	50	10	80	50	50	50	50	10	50
11 4301200	80	80	10	80	80	50	50	80	10	50
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This dashboard is intended to be used as a projection tool with filters for department, sub-department, object level, individual KFS account number and percentage scale for estimation. Balances reflected include: Revised Budget, Actual YTD Expenses, Actual YTD Revenue, Encumbrances, Budget Balance Available, Annualized Actual Fiscal Yr Expenses, Annualized Actual Fiscal Year Revenues, Projected Revenues and Projected Budget Balance Available. The user can project budget figures by object level and selected accounts by utilizing the filters at the top of the dashboard. The bottom column chart will graphically display Actual Current FY Expenses, Annualized Actual Fiscal Year Expenses and Projected Expenses if filter input is used.

### Dashboard Use Cases:

The Dean's fiscal office sent out an email in November asking the departments to prepare for a possible 1% base budget cut and/or a 1% fund sequestration this FY. The email states that we will not know definitively if we will receive these cuts until March, but that department fiscal managers should work with their Chairs now to be prepared for one or both of these cuts. Use this Dashboard to facilitate this conversation with your Chair, while identifying what impact these cuts will have on your current FY and long-term operating plans.





### AGNR Department Awards:

RYLAS NATL	of CULTURE & RAL RESOURCES	Department AGNR-Agricultural & Resource V	Sub Department	AGNR-Agricultural	& F Vpdate			st Refreshed: -JUL-17
AGNR-A	gricultural & Resource Economics	Department Award Dollar Totals by PI	AGN	R-Agricultural &	Resource Econom	nics Department A	ctual Indirect (	Costs Collected
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		AGNR-Agricultural & Resource Eco	nomics Departm	ent Award Totals	by Agency			
			nomics Departm	ent Award Totals	by Agency Final Award Explr Date	Oblig Award Dist Amt	Indirect Cost Rate	IDC Total Project
ırd Pl	per All Cosus Sponsor	AGNR-Agricultural & Resource Eco	Account Number	Award Begin Date	Final Award Expir Date			
ırd Pl	pse All	AGNR-Agricultural & Resource Eco Administrative Reservice Reference Manual REEE Orizonative Reservice Reference referencement: American and Primogen in a coatal internet	The second second	Contraction of the		Oblig Award Dist Amt \$113,059	Indirect Cost Rate 52.00%	IDC Total Project \$22,386
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rd Pi d Allen Newburn Lichtenberg Lichtenberg ard D. Leathers ard D. Leathers	pe All Consul Systems NSF UBDA-Economic Research Service UEDA-Atational Institute of Food and Apstaulture STMCHAuryland Department of Apstaulture	ACIARA-Apricultural & Resource Ecoco ACIARA-Apricultural & Resource Ecoco ACIARA-Apricultural & Resource Internation Content Resource Aprication and Internation Content Resource Aprication and International International Apricational International I	Account Number 5245190 5258130 5254810 4301671	Award Begin Date 15-SEP-14 04-AUG-16 01-SEP-11 01-OCT-15	Pinal Award Expir Date 31:4UG-18 30:SEP-17 31:4UG-16 30:SEP-16	\$113,058 \$25,000 \$413,485 \$371,000	52.00% 0.00% 52.00% 10.00%	\$22,386 \$0 \$141,104 \$9,404
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rd PI d Allen Newburn Lichtenberg Lichtenberg ard D. Leathers ard D. Leathers ard D. Leathers ard D. Leathers	per All Central Sponsor NSF UBDA-Economic Research Service UBDA-Autional Institute of Food and Agriculture STMD-Manyland Department of Agriculture STMD-Manyland Department of Agriculture STMD-Manyland Department of Agriculture UBDA-Farm Service Agency UBDA-Farm Service Agency UBDA-Farm Service Agency UBDA-Farm Service Agency	Actarbance of the second of th	Account Number 5245190 5258130 5258130 5254810 4301671 4303461 5256850 5258030 4318381	Award Begin Date 15-SEP-14 04-AUG-16 01-SEP-11 01-OCT-15 01-SEP-18 24-OCT-14 30-JUN-16 15-AUG-16	Pinal Award Expir Data 31-AUG-18 30-SEP-17 31-AUG-16 30-SEP-16 30-SEP-16 30-SEP-16 30-JUN-17 14-JJAN-19	\$113.059 \$25.000 \$413.485 \$371.000 \$118.224 \$14.567 \$7.400 \$45.000	52.00% 0.00% 52.00% 10.00% 10.00% 52.00% 10.00% 52.00%	\$22,386 \$0 \$141,104 \$9,404 \$6,781 \$0 \$914 \$2,269
nd PI d Allen Newburn Lichtenberg and D. Leathers and D. Leathers and D. Leathers and D. Leathers and D. Leathers es C. Hanson es C. Hanson	De Al Corcus Superson NSF USDA-Economic Research Service USDA-Assertational Institute of Food and Agriculture STMD-Munyland Department of Agriculture STMD-Munyland Department of Agriculture USDA-Frem Service Agency USDA-Frem Service Agency Puter Harvest CASA University of California - Davis	ACARA	Account Number 5245100 5258100 5258100 4301671 4303461 5258800 5258000 5258000 4303931 4327140	Award Begin Data 15-8EP-14 04-AUG-16 01-0EP-11 01-0EP-15 01-0EP-16 24-0CT-14 30-JM-16 01-0CT-14	Pinal Award Expire Date 31-AUG-18 30-SEP-17 31-AUG-16 30-SEP-16 30-SEP-16 30-SEP-16 30-JUN-17 14-JAM-19 30-SEP-17	\$113.059 \$25.000 \$413.485 \$371,000 \$118.224 \$14,567 \$7,460 \$45,000 \$3,165,428	52.00% 0.00% 52.00% 10.00% 10.00% 52.00% 52.00% 11.13% 28.00%	\$22,386 \$0 \$141,104 \$9,404 \$6,781 \$0 \$014 \$014 \$02,209 \$647,316

This dashboard provides a listing of all your departmental active grants and contracts for the current fiscal year (FY). The pie chart identifies total funding by Principal Investigator (PI). Click on a pie slice to filter the bar chart to the right, which provides you indirect costs (IDC) collected:

- 1. Fiscal Year
- 2. Project to Date

The table located at the bottom of the dashboard provides award details for each project.

#### Dashboard Use Cases:

Your Chair has been entertaining the idea of starting to allocate a portion of the Department's DRIF return directly to the PI who generated it. Use this Dashboard to come up with a departmental procedure on identifying how much DRIF each PI has generated for the department each FY and advise your Chair on how to determine the amount allocated back to the PI each FY.





### **Research Dashboards**

Three research dashboards have been developed to assist AGNR staff in reviewing proposal and award trends by fiscal year, sponsor type and agency. The suite of research dashboards can be accessed under the AGNR: Research category as shown below:



### AGNR Research Dashboard:



This dashboard displays award totals by fiscal year and allows the user to:

- 1. Filter the pie, tree and column charts by click on the fiscal year buttons at the top of the chart.
- 2. The tree chart displays the totals by funding agency by the selected fiscal year.
- 3. The column chart located in the bottom right of the dashboard displays the award totals by department.



### AGNR Awards Dashboard:



This dashboard displays the counts and aggregate award totals sorted by fiscal period. Users can filter the dashboard by fiscal year, department, sponsor type and agency using the filters at the top of the dashboard. The tabular chart displays the award details by the fiscal period selected using either the count or aggregate amount charts above the tabular chart.





### AGNR Proposals Dashboard:



Similar to the AGNR Awards Dashboard, this dashboard displays the counts and aggregate **proposal** totals sorted by fiscal period. Users can filter the dashboard by fiscal year, department, sponsor type and agency using the filters at the top of the dashboard. The tabular chart displays the **proposal** details by the fiscal period selected using either the count or aggregate amount charts above the tabular chart.

