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:

b. Internet Explorer:
   i. Bookmark icon:
   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.

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. iDashboards uses single-sign on authentication. Click 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 – dkenny82@umd.edu.

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:

1. Menu → User Settings → Startup Dashboard
   Click the Select button to specify your startup dashboard:
2. A navigation similar to Windows Explorer will appear. Choose: **UMD Dashboards → UMD Dashboard Launcher** and click OK.

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:**
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

**Magnify Icon:**
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.

User Alerts:
Currently not being used.
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:

User Settings:

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

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 Kuali 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 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

**Overview of Charts:**

<table>
<thead>
<tr>
<th>Chart Name</th>
<th>Chart Description</th>
<th>Drills To?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State Support Unrestricted &amp; Restricted Accounts (Text)</strong></td>
<td>Displays revised budget total, fiscal expense &amp; encumbrance totals, current and projected fund balances for non-restricted subfund groups.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>State Support Unrestricted &amp; Restricted Totals (Bar Chart)</strong></td>
<td>Visualizes revised budget, expenses &amp; encumbrances and current fund balance totals by State Support Unrestricted &amp; Restricted subfund group.</td>
<td>Account Totals (tabular chart)</td>
</tr>
<tr>
<td><strong>Account Totals (Tabular Chart)</strong></td>
<td>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.</td>
<td>Account Details</td>
</tr>
<tr>
<td><strong>Account Details (Tabular Charts)</strong></td>
<td>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).</td>
<td>KFS Account Overview</td>
</tr>
<tr>
<td><strong>Restricted Accounts Totals (Text)</strong></td>
<td>Displays award totals and project to date expenses of Non-State Support restricted subfund groups.</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Restricted Totals (Bar Chart)</strong></td>
<td>Visualizes award totals and project to date expenses by subfund.</td>
<td>Account Totals (tabular chart)</td>
</tr>
</tbody>
</table>
UMD Faculty and Staff Budget

Overview & Purpose:
This dashboard visualizes a department's budgeted position $$'s and FTE by program and by position status: Vacant vs. Position Filled. Dashboard users can pivot the tabular chart below using the Position Filled or Vacant buttons. Expanding the subcode name/employee group classification will reveal a list of employees falling under that group. Employee details include position number, primary name, title, account number, appointment length, PHR appointment base salary, and FTE.

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

1. Identify their budgeted position dollars by both vacancy and position filled.
2. Utilize vacant FTE and dollars

Available Filters:
1. BPM System: 19LIVE, 19WB, 18LIVE...
2. Department
3. Sub Department
4. Subfund Group

Overview of Charts:

<table>
<thead>
<tr>
<th>Chart Name</th>
<th>Chart Description</th>
<th>Drills To?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budgeted Dollars &amp; Positions by Program</td>
<td>Displays revised budget $$'s and FTE by program type</td>
<td>N/A</td>
</tr>
<tr>
<td>(Cone Chart)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budgeted Position Funding &amp; FTE (Pie Chart)</td>
<td>Visualizes total available vacancies &amp; positions filled $$'s and FTE in a relationship to one another.</td>
<td>Department Position Listing</td>
</tr>
<tr>
<td>Department Position Listing</td>
<td>Lists positions grouped by Subcode employee classification by position status (Vacant vs. Position Filled).</td>
<td>Row expands with details under column names</td>
</tr>
<tr>
<td>(Tabular Chart)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Overview & Purpose:
This dashboard visualizes the department/subdepartment 2018 research expenditures 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 “2018 Department Research Expenditures”. The “2018 Research Expenditures by PI” tabular chart can be sorted by any of the column names. Clicking on an investigator drills the investigator’s 2018 research expenditures by sponsors. 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 2018 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. Department
2. Sub Department
Overview of Charts:

<table>
<thead>
<tr>
<th>Chart Name</th>
<th>Chart Description</th>
<th>Drills To?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018 Research Expenditures by Position Type</td>
<td>Displays research expenditures by position type: TTK, PTK, Staff, etc.</td>
<td>2018 Department Research</td>
</tr>
<tr>
<td>(Pie Chart)</td>
<td></td>
<td>Expenditures</td>
</tr>
<tr>
<td>2018 Department Research Expenditures</td>
<td>Totals by category status by the selected position type chosen/drilled from the</td>
<td>N/A</td>
</tr>
<tr>
<td>(Bar Chart)</td>
<td>adjacent pie chart.</td>
<td></td>
</tr>
<tr>
<td>2018 Research Expenditures by PI</td>
<td>Total research expenditures, indirect and direct expenditures by investigator</td>
<td>2018 Research Expenditures</td>
</tr>
<tr>
<td>(Tabular Chart)</td>
<td>credit split in the administered unit.</td>
<td>PI Details</td>
</tr>
<tr>
<td>2018 Research Expenditures PI Details</td>
<td>Investigator 2018 research expenditures details by sponsor, award title and</td>
<td>N/A</td>
</tr>
<tr>
<td>(Tabular Chart)</td>
<td>account number.</td>
<td></td>
</tr>
</tbody>
</table>

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.
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:

<table>
<thead>
<tr>
<th>Chart Name</th>
<th>Chart Description</th>
<th>Drills To?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kuali Research Proposals</td>
<td>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.</td>
<td>Matching period to Funding Totals to on the right</td>
</tr>
<tr>
<td>(Line Chart)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kuali Research Awards</td>
<td>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.</td>
<td>Matching period to Funding Totals to on the right</td>
</tr>
<tr>
<td>(Line Chart)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kuali Research Expenditures</td>
<td>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.</td>
<td>Matching period to Funding Totals to on the right</td>
</tr>
<tr>
<td>(Line Chart)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 drill down into a tabular chart listing the investigator splits and awards comprising the sponsor totals.

Available Filters:
1. Division
2. Department
3. Subdepartment

Overview of Charts:

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

<table>
<thead>
<tr>
<th>Chart Name</th>
<th>Chart Description</th>
<th>Drills To?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenure/Tenured Track Award $§ FY Trend vs. Non-TTK Employees (Line Chart)</td>
<td>This line chart displays the trend of TTK vs. Non-TTK employees’ award total FY trend by the selected division and/or unit.</td>
<td>Top 10 Investigators by Award &amp;&amp;’s &amp; FY</td>
</tr>
<tr>
<td>Top 10 Investigators by Award &amp;&amp;’s &amp; FY (Bar Chart)</td>
<td>This bar chart displays the top 10 investigators by award credit dollars in the selected fiscal year.</td>
<td>N/A</td>
</tr>
<tr>
<td>Award $§’s by Investigator &amp; FY (Tabular Chart)</td>
<td>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.</td>
<td>Investigator Name Award $§’s FY Trend</td>
</tr>
<tr>
<td>Investigator Name Award $§’s FY Trend (Line Chart)</td>
<td>This line chart displays the selected investigators award credit dollars by fiscal year.</td>
<td>Investigator Name Awards FY</td>
</tr>
<tr>
<td>Investigator Name Awards FY: (Tabular Chart)</td>
<td>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.</td>
<td>Expands to reveal award details.</td>
</tr>
</tbody>
</table>
Additional Functionality

Bookmarks:

Adding a Bookmark:

1. Similar to adding internet browsing bookmarks, **first open the dashboard** in which you would like to add as bookmark.
   a. To add a bookmark click the star located in the top left of the iDashboards application:

Accessing Bookmarks: Click on the star icon at the top left of the iDashboards application and click on the dashboard you would 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:
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 left 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 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:

   ![Filter List]

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

   ![Unselected Filter]

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

   ![Selected Filter]

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

   ![Repeat Steps]

   e. Click Update to refresh the dashboard.

   ![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 2019 details.

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

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:

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.

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”: 

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:

```
<table>
<thead>
<tr>
<th>Fin Obj Od Nm</th>
<th>Actual Fiscal Year</th>
<th>Fin Obj Level Nm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Meals</td>
<td>2045.69</td>
<td>Travel</td>
</tr>
<tr>
<td>Conference Fees</td>
<td>025</td>
<td>Travel</td>
</tr>
<tr>
<td>Faculty Recruiting</td>
<td>0</td>
<td>Travel</td>
</tr>
<tr>
<td>Foreign Travel</td>
<td>420322 46999999</td>
<td>Travel</td>
</tr>
<tr>
<td>In State Travel</td>
<td>150174 63999999</td>
<td>Travel</td>
</tr>
<tr>
<td>Out of State Travel</td>
<td>1058467 5000000</td>
<td>Travel</td>
</tr>
<tr>
<td>Travel Card Receivables</td>
<td>700</td>
<td>Travel</td>
</tr>
<tr>
<td>Award Revenue</td>
<td>0 Federal Grants and Contracts</td>
<td></td>
</tr>
<tr>
<td>Contracts and Grants</td>
<td>0 Federal Grants and Contracts</td>
<td></td>
</tr>
<tr>
<td>Indirect F&amp;A Costs</td>
<td>0 Federal Grants and Contracts</td>
<td></td>
</tr>
<tr>
<td>Award Revenue</td>
<td>0 Nongovernmental Grants and Contracts</td>
<td></td>
</tr>
<tr>
<td>Gift Revenue from Donors</td>
<td>0 Nongovernmental Grants and Contracts</td>
<td></td>
</tr>
<tr>
<td>Indirect F&amp;A Costs</td>
<td>0 Other Operating Revenue</td>
<td></td>
</tr>
<tr>
<td>Operating Expenses</td>
<td>0 F&amp;A</td>
<td></td>
</tr>
</tbody>
</table>
```

Exporting Chart Data:

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

```
New Chart...
Open Chart...
Save Chart...
Save Chart As...
Close Chart...
Chart Data...
Chart Designer...
View Chart as Report
Export Chart Data...
```

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Kenny</td>
<td>Director of Business Analytics</td>
<td><a href="mailto:dkenny82@umd.edu">dkenny82@umd.edu</a></td>
</tr>
<tr>
<td>Nicholas Bentley</td>
<td>Business Systems Developer</td>
<td><a href="mailto:nbentley@umd.edu">nbentley@umd.edu</a></td>
</tr>
<tr>
<td>Dan Ramia</td>
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