

Grant Admin Dashboard Overview

This Quick Reference Guide (QRG) is designed to walk Grant Related roles (e.g., Grant Manager, Grant Financial Analyst, etc.) through navigating the Grant Admin Dashboard. The Grant Admin Dashboard provides a one-stop shop for users in Grant Administrator or Operational Support Roles to access common tasks, reports and other resources needed to do their daily-work. By the end of this QRG, you will be able to access, set up, and review the Grant Admin Dashboard.

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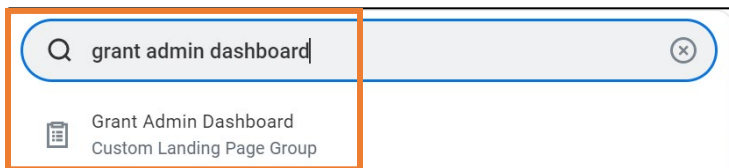
Access Grant Admin Dashboard

You can access the Grant Admin Dashboard in two ways: by searching directly in Workday or by selecting the Grant Admin Dashboard Worklet.

Access Grant Admin Dashboard from Workday Search:

On the Workday Home screen:

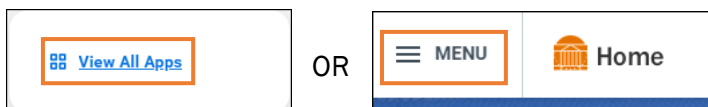
- 1. Type **Grant Admin Dashboard** and select the item.



Access Grant Admin Dashboard from Workday Applications:

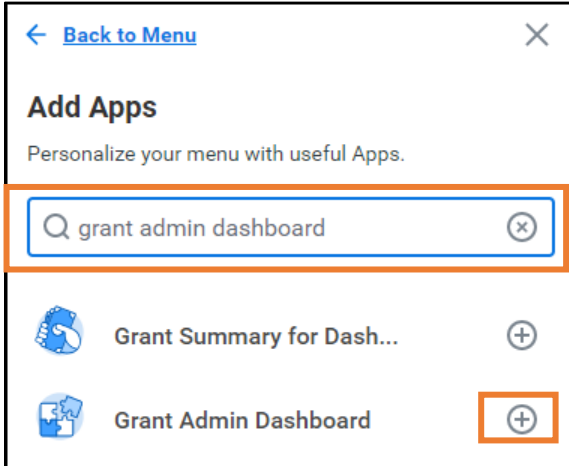
On the Workday Home screen:

- 1. Click **View All Apps OR Menu** at the top left of the screen.



On the **Menu** screen:

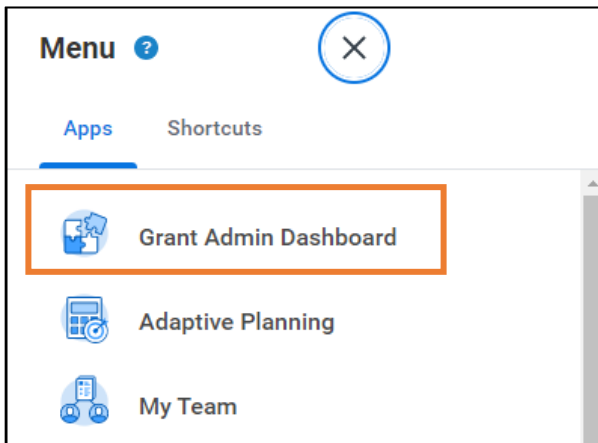
2. Select **Apps** (if it is not already selected).
3. To add the Grant Admin Dashboard app, click the **Add Apps** button at the bottom of the menu.
4. Type *Grant Admin Dashboard* in the **Find Apps** field and then click the **plus sign** next to the item.



5. Click **Back to Menu**.

On the **Menu** screen:

6. Select the **Grant Admin Dashboard** app to open the dashboard.






For quick access to the dashboard, you can add the **Grant Admin Dashboard Landing Page** to your Browser Favorites (bookmarks).

Set Up and Modify Grant Admin Dashboard

When visiting the Grant Admin Dashboard for the first time, **you will need to set up each section once in order for the data to display for future visits.** You can set up and modify these sections by using available functionalities (Configure and View Chart Data). You may have one or both options available at the top right corner of each section.

The table below provides a summary of the functionalities available in the Grant Admin Dashboard. Each functionality is displayed in the form of icons when viewing a section in Workday.

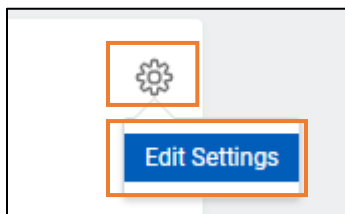
Icon	Name	Description
	Configure and View Chart Data	View Chart Data allows you to select various chart types to view your data. For example, Donut, Line, Stacked Column, etc. Configure allows you to modify your variables on the X and Y Axis and the metrics to be included.
	Edit Settings	The Edit Settings option allows you to filter the data and view only relevant data. Once you have made your selections, click OK in the Edit Worklet Settings to save changes. You will most commonly filter by your Cost Center/Cost Center Hierarchy . You can download and export the report using the Download in Excel and Export to Worksheets options respectively.



It is important to set-up your preferences early on as this will automatically save for future visits to the Dashboard.

Modify Section - Edit Settings as follows:

1. On the **Grant Admin Dashboard**, navigate to the section you want to edit settings and configure.
2. Click the **Edit Settings** icon.

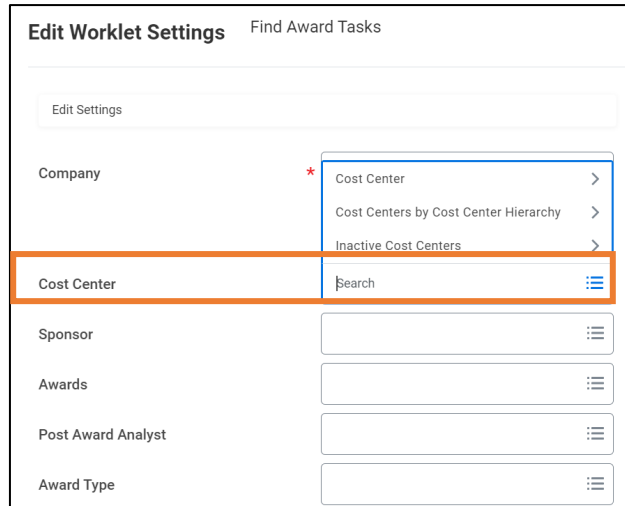


3. On the **Edit Worklet Settings** screen, enter the information required for each field to customize this section. You can also enter information in the optional fields to narrow your search results.



On the Edit Worklet Settings screen, there may be different fields you can complete for each section. **You will most likely filter by your Cost Center/Cost Center Hierarchy.**

In the **Cost Center** or **Worktags** field, enter your cost center. You can also select **Cost Centers by Cost Center Hierarchy**, if needed.


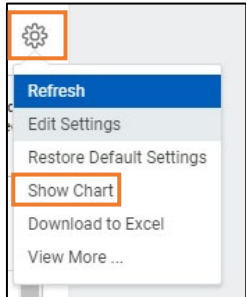


4. Click the **OK** button to save your changes. The data displayed in the sections will update based on your defined preferences.

Modify Section - Configure and View Chart Data as follows:

1. On the **Grant Admin Dashboard**, navigate to the section you want to configure and view chart data.
2. Click the **Configure and View Chart Data** icon.




 NOTE	<p>If you do not see the Configure and View Chart Data icon, click the Edit Settings icon and select Show Chart. This will now display the icon.</p> 
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3. Select the **chart type** you want (e.g. Donut, Line, Stacked Bar, etc.).
4. For advanced settings, select **Configure**.
5. In the **Configure** window, modify the variables section as needed such as the Horizontal Axis and Legend.
6. Select the **arrow (>)** icon next to **Advanced** to expand the section and modify as needed.
7. Select (x) icon to close out the window. Your changes will now be displayed and saved.

Review Grant Admin Dashboard

On the **Grant Admin Dashboard** screen:

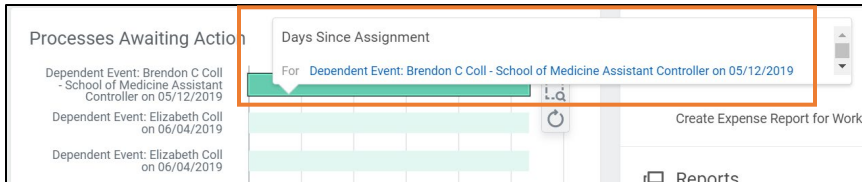
1. Select the following tabs:
 - **Landing Page** – This page displays sections such as Processes Awaiting Action and Find Award Tasks in the form of a chart and table. It also includes a list of tasks, reports and quick links related to grants.
 - **Grant Summary** – This tab displays a Grant Summary section plus a list of reports and quick links related to grants.
 - **Financial Summary** – This tab displays a list of tasks, reports and quick links related to financials.

 NOTE	<p>When reviewing each tab, certain data may not display initially. This requires you to configure and edit the specific sections to match your viewing preferences. Refer to Modify Grant Admin Dashboard to set your data viewing preferences.</p>
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Under the **Landing Page** tab:

2. Review the following sections:

- **Processes Awaiting Action** – Lists the business processes that are awaiting action from you. Hover your mouse over the specific area for further details and select the item to take action on.



- **Tasks** - You can access common tasks such as **Create Expense Report** and **Find Subawards**. Select the task you would like to initiate from this section.
- **Reports** - You can access common reports such as **OSP Award Summary Report**. Select the report you would like to run from this section.
- **Quick Links** – You can access quick links such as **UBI User Hub**, **ResearchUVA (Powered by Huron)**, and **UVA Finance Business Terms**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.
- **Find Award Tasks** – This section is a report which lists all award tasks that are assigned to you. You can scroll right in the section to see the **Task Status, Task Type, Award Type, Sponsor**, and other details. Hover your mouse over an area or select a data point for further details.



NOTE

Instead of selecting a hyperlink directly, **right-click** and select **See in New Tab**. This will open the hyperlink in a brand-new tab that avoids you having to navigate back to the Grant Admin Dashboard.

Post Award Analyst	Award Task
Ebony M. Turner	
<div style="border: 1px solid orange; padding: 2px; display: inline-block;">See in New Tab</div>	
Copy URL	
Copy Text	
View Printable Version	
Export to Excel	

Under the **Grant Summary** tab:

3. Review the following sections:
 - **Grant Summary** – You can view details for your grants including budget, actuals, obligations, and other details based on the Cost Center(s) selected. Hover your mouse over an area or select a data point for further details.
 - **Reports** - You can access common reports such as **OSP Award Summary Report, Find Awards, and Find Subawards**. Select the report you would like to run from this section.
 - **Quick Links** – You can access quick links such as **SIS Login** and **UBI Research Conflict of Interest Module**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Financial Summary** tab:

4. Review the following sections:
 - **Tasks** - You can access common tasks such as **Create Journal** and **Find Journal Lines**. Select the task you would like to initiate from this section.
 - **Reports** - You can access common reports such as **Institutional Base Salary Details, Worker Costing Allocation Information-Payroll** and **General Ledger Details**. Select the report you would like to run from this section.
 - **Quick Links** – You can access quick links such as **Salary Cap tool, Fringe Rates** and **UBI User Hub** from this section. These are sites or sources available outside Workday. Select the link you would like to go to from this section.



The tasks and reports that display in each tab are dependent on your security roles. Therefore, some items described in this QRG may not display if they are not applicable to your security role(s).