Contents

Summary 1
Navigation 1
Display management 1
Security 3
Data definitions 4
Additional Information 5

Summary

The GMAS Accounts Dashboard supports flexible filtering, finding, and formatting of GMAS Account data, with segment context for personalized reporting. It facilitates using data to answer many sponsored account-level questions, including the following examples:

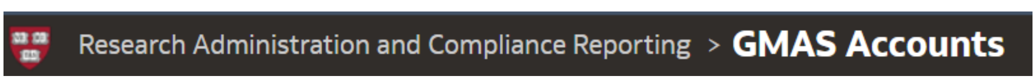
- How does income compare to expenses across all accounts and segments?
- What are the GL budget amounts for my sponsored accounts?
- How many segments does my department have with an obligated end date set for next month?

These examples are just a few of the many questions this dashboard can answer.

Navigation

Visit the dashboard directly or through the Research Administration and Compliance Reporting Landing Page in HART.

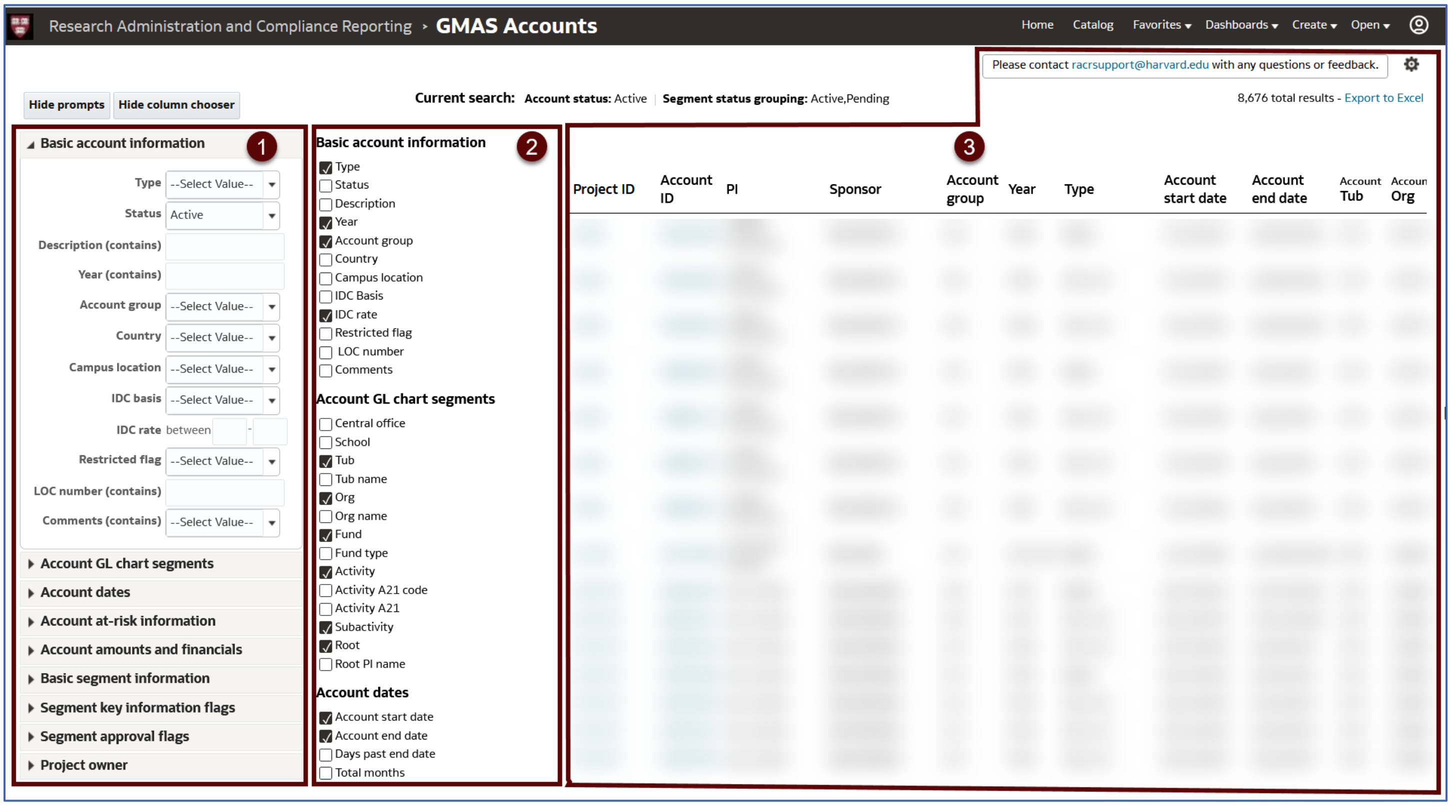
At the top left of each dashboard page are breadcrumbs that allow you to return the Research Administration and Compliance Reporting landing page.



Display management

The dashboard contains three primary areas of display management where you can filter output, change results columns, and view and manage results.

For more information on certain prompts or column headings, hover over the question mark icons (“tool tips”) beside them.



1. Prompts

Use this section to filter the data that displays.

Data

- By default, all active accounts on active and pending segments will display.
- Choose any prompt selection and the results will refresh as soon as you click away from the selection.
- Chosen prompts will display as text in the top section of the page as **Current Search**. This information will also be shown in the file when the data are exported to Excel.
- To reset all selections, either:
  a. Choose the gear icon at the upper right and then choose "Clear My Customizations"
     OR
  b. Refresh the browser page.

Behavior

- Click the heading of each grouping to expand or collapse the section.
- Click the **Hide prompts** (or Show prompts) button at the top left of the page to toggle the whole section.
- When changing items in this section, portions of the page display may refresh.

2. Column Chooser

Use this section to choose which columns display in the output.

Data

- By default: Project ID, Account ID, PI, Sponsor, Account group, Year, Type, Account start date, Account end date, Account Tub, Account Org, Account Fund, Account Activity, Subactivity, Root, Allocated total, Account Total expenses, and IDC rate columns are selected.
- Project ID cannot be de-selected and will always display.
- Click the box beside the item to select or de-select the column and the results will immediately refresh.

- To reset all selections, either:
  a. Choose the gear icon at the upper right and then choose “Clear My Customizations” OR
  b. Refresh the browser page.

Behavior

- Columns function independently of prompts. For example: Even if you choose to use a prompt to filter data, that will impact if that column displays (or not), only interacting with the checkboxes beside each item will control the column display.
- Click the **Show column chooser** (or Hide column chooser) button at the top left of the page to toggle the whole section.
- When changing items in this section, portions of the page display may refresh.

3. Display

Use this section to move columns from left to right, view data, and export results.

Data

- By default: Project ID, Account ID, PI, Sponsor, Account group, Year, Type, Account start date, Account end date, Account Tub, Account Org, Account Fund, Account Activity, Subactivity, Root, Allocated total, Account Total expenses, and IDC rate columns display.
- If the table of results is larger than the display window, secondary scroll bars may appear internal to the table display.
- To reset the display, either:
  a. Choose the gear icon at the upper right and then choose “Clear My Customizations” OR
  b. Refresh the browser page.
- Use the upper right menu items for the following activities:
  - **Gear:** Save My Customizations (save your filters and columns), Apply Saved Customizations (view your previously saved customizations for this dashboard), Clear My Customizations (refresh the current view) and other detailed options.
  - **Total Results Display:** View current total count of records based on the chosen filters.
  - **Export to Excel:** Export detailed results based on chosen filters, columns, and column order. Chosen prompts will display as text in the top section of the page as Current Search. This information will also be shown in the file when the data are exported to Excel.

Behavior

- Click, hold, and drag the tab that appears above each column heading to move the columns from left to right.
- Click the up and down arrow that displays at the top of each column heading to sort by that column.
- Right click (or control + click on a mac) on any column for additional menu options.
- When changing items in this section, portions of the page display may refresh.

Security

All Grants Management users have access to this dashboard and will see the same data. However:

- The Project ID and Approval ID columns will only contain a link if the logged in user has access to the corresponding segment in GMAS.
- Comments will only appear if the logged in user has access to the corresponding account information in GMAS.

Data definitions

The following section provides descriptions of some of the data and prompts as they are labeled in on the dashboard. As mentioned earlier in this document, this dashboard also has a collection of on-screen tool tips that provide information about each prompt.

Items at the segment level are labeled in the prompt and column chooser section headings as segment items.

Funding Instrument includes the distinction between billing agreement, contract, cooperative agreement, fixed price contract, fixed price grant, grant, or other transaction authority. Note that billing agreement may or may not be also indicated as **Research Type**.

Segment Key information flags and Segment approval flags are at the segment level only.

School rollups

- FAS: Tubs 110, 115, 310, 340, 355, 370, 385, and 400
- GSE: Tub 255
- HKS: Tubs 205 and 215
- HLS: Tub 265
- HMS: Tub 520
- HMS Other: Tubs 490, 505, 510, 515, 535, 565, and 570
- HSDM: Tub 550
- SCRB: Tub 420
- SEAS: Tub 325
- SPH: Tub 275
- WYSS: Tub 635
- Other: All other Tubs

Sponsor grouping
For non-Federal sponsors, the groupings are based on sponsor type (as set and shown in GMAS as **organization type** on the organization home page).

For US Federal Sponsors, an additional grouping is in place for the following sponsors:

- Department of Defense
- Department of Energy
- NIH
- NSF
- Other DHHS
- Other Federal Sponsors

This grouping is set and shown in GMAS as the **Standard federal reporting group** on the organization home page.

Ultimate Sponsor is the prime sponsor if it exists, otherwise it is the direct sponsor.

Calculated Items

Some prompts and columns available in the dashboard are generated based on evaluated (or calculated) data from GMAS. The following table only summarizes items that are calculated for display on the dashboard.

Section	Column/ prompt name	Summary of evaluation/ calculation of segment-level information
Dates	Obligated months total	Months between the obligated start and end date (including fractional months).

Dates	Obligated months remaining	Months between today and the obligated end date (including fractional months)
Dates	Obligated time %	The percentage of obligated time elapsed in the project. (today - obligated start / obligated end - obligated start). If the obligated end date is in the past, this should show as 100%. Rounded to 1 decimal.
Dates	Anticipated months total	Months between the anticipated start and end date (including fractional months).
Dates	Anticipated months remaining	Months between today and the anticipated end date (including fractional months). This column will be blank (null) if the obligated end date is in the past.
Dates	Anticipated time %	The percentage of anticipated time elapsed in the project. (today - anticipated start / anticipated end - anticipated start). If the obligated end date is in the past, this will show as 100%. Rounded to 1 decimal.
Award dollars	Authorized: *all items labeled "authorized" in this section*	For all columns in this section, authorized is a calculation of obligated + carryforward
Financials	Authorized balance	(Obligated total + Carryforward total) - Total expenses
Financials	% Authorized spent	Total expenses / Total Authorized (Obligated + Carryforward) Rounded to 1 decimal.
Financials	Authorized burn rate	% Authorized spent / % Obligated time
Financials	Projected authorized balance	Total Authorized * Authorized burn rate
Financials	Anticipated balance	Anticipated total - Total expenses
Financials	% Anticipated spent	Total expenses / Total anticipated Rounded to 1 decimal.
Financials	Anticipated burn rate	% Anticipated spent / % Anticipated time Rounded to 1 decimal.
Financials	Projected anticipated balance	Anticipated total * Anticipated burn rate
Financials	Cash position	Total expenses + Income + Transfers

Additional Information

[RACR Landing Page (in HART)]
[RACR Support Site]
Help Desk: racrsupport@harvard.edu