



Workday PI Research Administration Dashboard (RAD) Training Guide

Overview

This Training Guide is designed to walk users through navigation and use of the Workday PI Research Administration Dashboard (RAD) in UBI Qlik Sense.

The Workday PI RAD app is a centrally located UBI Analytics (Qlik Sense) app that provides current research administration metrics and details. The dashboard is a reliable and consolidated way to see your data, plus it is intended to provide a “one-stop” window into financial issues and trends associated with sponsored research. It includes data from both Workday and SAFM (the Financial Aid system of record).



A few important distinctions between Qlik Sense Reporting and Workday Reporting:

- Workday reporting updates in real-time; Qlik Sense updates **nightly** Sunday through Thursday. If you need real-time reporting, look to Workday.
- If sub-awards are on an award, the PI RAD app in Qlik Sense is going to reflect your most accurate numbers for balance available. Currently Workday reporting cannot correctly calculate the F&A Obligations on sub-awards with basis limits, but this issue **has been corrected** in Qlik Sense.

Additional Resources:

- [UBI Analytics Navigation Trifold](#)
- [Intro to Qlik Sense online training](#) – to become more familiar with using Qlik Sense. You *do not* need to request the EDW_P_Finance Role.
- [Overview and Navigation Video](#)

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Navigation Tips and Tricks

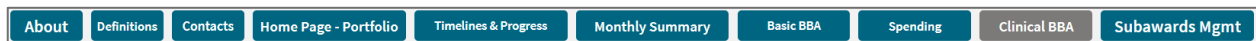
Logging into the App:

1. Click on the [PI RAD App LINK](#)

The app will automatically open to the **PI Portfolio and Budgets – Homepage**, where you will see all the current Awards and Grants for which you are listed as Grant PI.

Navigation Buttons:

1. Use the menu buttons at the top of the page to navigate to the most common sheets:



2. You can also use the drop-down menu in the upper right-hand corner to navigate to these sheets as well as any community sheets.



Community Sheets are customized sheets created by other users and published for others to use. They may not be applicable to you, and this guide does not provide information on how to use any of the Community Sheets.

The most likely scenario of a Community Sheet being applicable to you is if someone from your school/unit has created one. You can see who created a Community Sheet by clicking on the information icon located on the report thumbnail:



Table/visualization navigation:

1. There are many tables and visualizations on each sheet. Hover over or right-click a table or visualization to display the navigation options.
2. Click on the appropriate icon:



To share or download the table/visualization.



To expand the table/visualization to full-screen mode. When you want to exit the full-screen mode, click the x in the upper right-hand corner.



To take a snapshot of the table/visualization.



To go to the snapshot library.



To modify the visualization parameters (available on some).




To view information/definitions available for that table/visualization (available on some).

Sorting and Filtering:

1. To sort a column, click on the column header.

The column will be sorted in ascending order (numerical or alphabetical). Clicking the column header again will reverse the order.

2. To filter, click directly on a field in a table or visualization to select that item (i.e. a specific grant, date, spend category).

If you do not see the item you wish to select as a filter, search using the magnifying glass icon in the column header: 

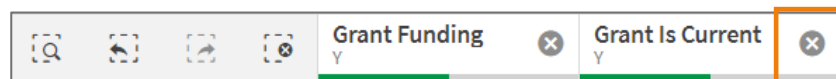


There are two default filters that you will see in the filter area when you first enter the dashboard.

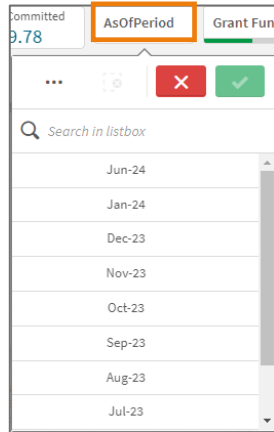
“Grant Funding – Y” – this filter is applied to narrow the dashboard down to grant-related data.

“Grant is Current – Y” – this filter is applied so that grants that have ended more than 90 days ago do not show up as a default. To see the information including all grants, you can change this filter.

To clear a filter, click on the x next to the filter displayed at the top of the page:



An optional filter field on some sheets is the **As-Of Period** filter. To view the data as it would have appeared on during a specific period, select this filter, then choose the period:



Filters selected will apply to **ALL** sheets until cleared.

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Summary of Sheets

The PI Research Administration Dashboard is separated into the following “sheets.”

About – provides basic information about the application, including any known issues or other pertinent information.

Definitions – provides definitions of terms and column headers seen in this application.

Contacts – provides information and allows for filtering on contacts, such as Award Lead PI, OSP Contact, Sponsor, Grant Manager, Subrecipient, and Organization Hierarchy.

Home Page – Portfolio – provides a high-level overview of your portfolio until filters are selected.

Timelines and Progress – provides a visualization of your Grant(s) timeline and, when a specific grant is selected, provides visualizations on Burn Rate and Days Worked.

Monthly Summary – provides a more detailed look at Award Summary – Total Costs, Future Obligations, Payroll Costing, Invoice History, and End Dates.

Basic BBA – provides a detailed, drillable look at Budget Balance Available.

Spending – provides a detailed, drillable look at Grant Spending by Fiscal Period and Spending Details – Actuals.

Clinical BBA – provides a detailed, drillable look at Budget Balance Available and Invoice History to give better visibility into Clinical grants.

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Subawards Management – provides a detailed look at the subawards associated with an award or grant.

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How to Find Award/Grant Balance Available



The following instructions guide you to the multiple places you can find the field **“Budget Balance after Committed.”**

Note that **“Budget Balance after Committed”** reflects the **Total Budget** (including budgeted F&A) minus all the following:

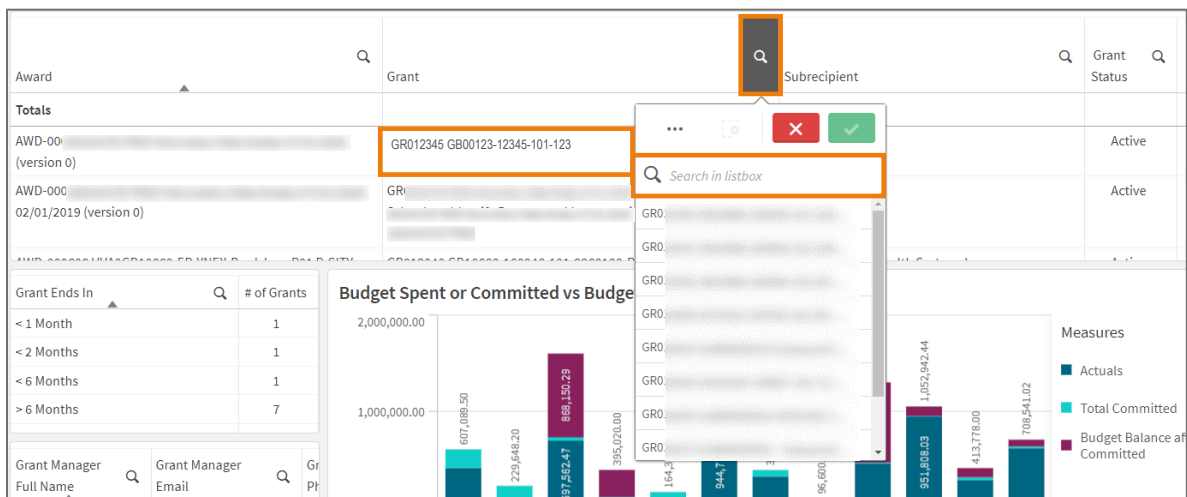
- Actuals
- Obligations (from purchase orders, supplier invoices, and future payroll costing allocations*)
- F&A Obligations
- SAFM Obligations (from financial aid due to GRAs)
- F&A Obligations SAFM (the F&A due, if any, from SAFM obligations)
- Commitments (from purchase requisitions)
- F&A Commitments

**Payroll Costing Allocations are not always set up through the entire Period of Performance*

From the **Home Page** sheet:

1. Select a Grant from the Award/Grant table on the home page.

Either click on the Award/Grant line within the table or select the magnifying glass icon in the appropriate column header and type your Award/Grant into the search bar:



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The Budget Balance after Committed will now show in **four** places on the Home Page:

The screenshot shows the Home Page with several key metrics and charts. Red callouts 1-4 highlight the following:

- 1:** Budget Balance after Committed in the summary table (277,094.06).
- 2:** Budget Balance after Committed in the main table (277,094.06).
- 3:** Budget Spent or Committed vs Budget Remaining by Grant chart, with a tooltip for a quick summary.
- 4:** Budget Balance Available chart.

From the **Monthly Summary** sheet:

1. Click the **Monthly Summary** button at the top of the page.
2. If you have not selected the Grant already, use the Grant filter table to find and select your Grant:

The screenshot shows the Grant filter table with search results for Award and Grant. The Grant filter table is highlighted in green.


3. Scroll to the right in the **Award Summary – Total Costs** table to see the Budget Balance after Committed.

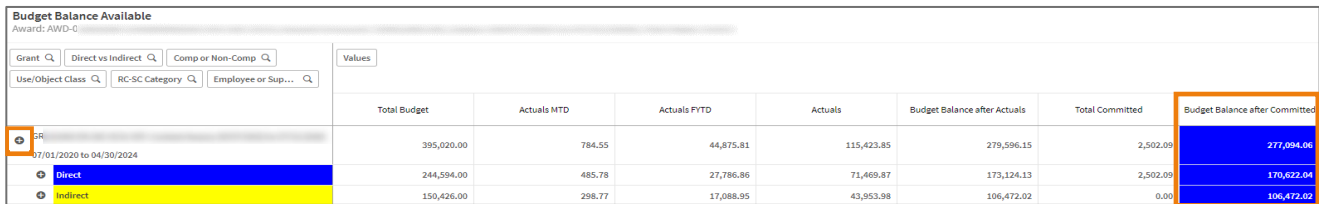
Award Summary - Totals Costs (Direct & Indirect)													
Grant Ends In	Award Description	Award Sponsor	Sponsor Award Reference Number	Cost Share Requi...	Award ID	Grant ID	Total Budget	Actuals	Budget Balance after Actuals	Budget Balance after Committed			
Totals													
< 6 Months				N	AWD-	GR-	395,020.00	115,423.85	279,596.15	277,094.06			

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From the **Basic BBA** sheet:

This is the best way to view what you have available to spend in Direct Costs versus Indirect Costs.

1. Click the **Basic BBA** button at the top of the page.
2. If you have not selected the Grant already, use the Grant filter table on the right to find and select your Grant.
3. In the Budget Balance Available table, click on the  to expand the table to view Direct and Indirect costs (it defaults to a rolled-up view):



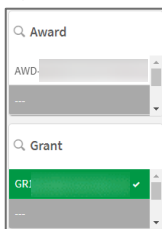
	Total Budget	Actuals MTD	Actuals FYTD	Actuals	Budget Balance after Actuals	Total Committed	Budget Balance after Committed
GR:	395,020.00	784.55	44,875.81	115,423.85	279,596.15	2,502.09	277,094.06
07/01/2020 to 04/30/2024							
Direct	244,594.00	485.78	27,786.86	71,469.87	173,124.13	2,502.09	170,622.04
Indirect	150,426.00	298.77	17,088.95	43,953.98	106,472.02	0.00	106,472.02

4. Continue to click the  to expand Direct and Indirect rows, drilling down to the level of detail you want to see.
 - a. To Expand all rows at once:
 - i. Right click on the  button
 - ii. Click the ellipsis 
 - iii. Click Expand/Collapse
 - iv. Select Expand All

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How to View Workers Costed to an Award/Grant

1. Click the **Monthly Summary** button at the top of the page.
2. If you have not selected the Award/Grant already, use the Award/Grant filter table to find and select your Award/Grant:



Award
AWD:

Grant
GR:

3. In the Payroll Costing table, view the employee, the worktag(s) and percentage(s) for their costing allocation, whether the costing allocation is Current/Historical/Future, and the Start/End dates for the allocation:

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Payroll Costing						
Payroll Costing Employee Name	GR, GF, DN, PJ	Comp' %	Current / History / Future	Start Date	End Date	
A	GR	25.00%	C	11/25/2023	12/24/2023	
A	GR	25.00%	H	8/25/2022	12/24/2022	
A	GR	25.00%	H	12/25/2022	2/24/2023	
A	GR	25.00%	H	2/25/2023	4/24/2023	
C	GR	2.00%	H	6/25/2022	12/24/2022	
H	GR	30.00%	H	6/25/2022	8/24/2022	

If you want to see the employee's entire distribution percent across all worktags, do not select an Award/Grant filter. Instead, select the employee as a filter.

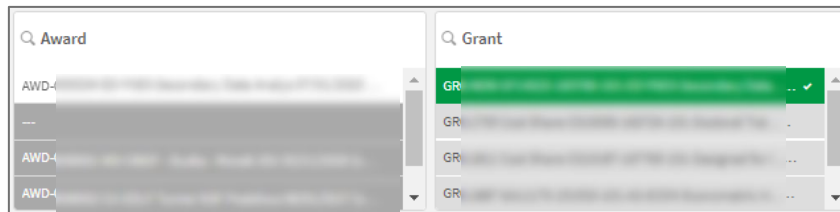
- In the **Future Obligations** table, you can view the dollar amount of the obligation for currently costed workers, broken down into Object Class for Salary/Wage and Fringe Benefits:

Future Obligations					
Award ID	Grant ID	Obligations	Worker/Supplier	Object Class	
Totals		1,549.09			
AWD-	GR	1,208.34	A	Standard: 01b_Salaries_and_Wages	
AWD-	GR	340.75	A	Standard: 02_Fringe_Benefits	

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How to View Details on Spending

- Click the **Spending** button at the top of the page.
- If you have not selected the Award/Grant already, use the Award/Grant filter table to find and select your Award/Grant:



- View the Spending by Fiscal Period table.
 - Further filter by selecting any of the following:
 - Object Class
 - RC-SC Category
 - Ledger Account
 - Fiscal Period
 - Expand any of the line items by clicking the + to drill down to the desired level of detail.

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Grant Spending by Fiscal Period									
Object Class	RC-SC Category	Ledger Account	Fiscal Period						
			Totals	Dec-23	Nov-23	Oct-23	Jun-23	May-23	Apr-23
Totals			115,423.85	784.55	2,243.93	41,847.33	2,918.68	9,929.70	2,368.69
+ Standard: 01a_Faculty_Salaries			38,316.03	-	705.96	13,366.67	1,411.92	4,678.33	-
+ Standard: 01b_Salaries_and_Wages			16,411.73	-	-	6,875.03	-	149.98	1,145.84
+ Standard: 02_Fringe_Benefits			15,240.55	-	197.68	5,669.96	395.32	1,320.11	320.84
+ Standard: 08a_Travel_Domestic			971.56	485.78	485.78	-	-	-	-
+ Standard: 10_Other_Direct_Costs			530.00	-	-	-	-	-	-

4. View the detailed transactions in the **Spending Details – Actuals** table:
 - a. Scroll to the far right to see all the information.
 - b. If there is a Journal Entry in Workday associated with the line item, you can click on the link in the Journal Number column to be taken to that item in Workday.

Spending Detail - Actuals							
Award	Grant	Object Class	RC-SC Category	Actuals	Employee Name	Supplier	
Totals				115,423.85			
AWD-001	GR01	Standard: 01a_Faculty_Salaries	SC0616 Salaries Faculty AGFM and Visiting FT	2,339.17			

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How to View Details on Subawards

1. Click the **Subawards Mgmt** button at the top of the page.

In the **Award Summary** table:

2. Select the Award. Once selected, this table will show a summary of that Award:
 - a. Scroll to the far right to see all the information.

Award	(Click to go to WD)	# of Non-Suba...	# of Suba...	Sponsor Award Reference	Cost Share Req...	Award Status	Award Lifecycle Status	Award Type	Award Start Date	Award End Date	Award Days Remal...	Award Total Amount	Total Budget	Award vs Budgeted Difference	Award Description
AWD-001	AWD-001	6	5	SR	N	Approved	Active	Grant	09/06/2022	06/30/2027	927	7,375,611.98	5,565,864.51	1,809,747.47	



Award Summary table column definitions:


- # of Non-Subawards – these will be any grants (including primary) that are not outgoing subawards
- # of Subawards – the number of outgoing subawards
- Award vs Budgeted Difference – This is the difference between your Total Budget and the Award Funded amount in Workday. If there is a variance, first

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de-select the **Grant is Current** filter being set to Y to see if this resolves the discrepancy.

In the **Grants** table:

3. View a summary of all the Grants/Subawards under that Award.
 - a. Scroll to the far right to see all the information, including who the subrecipient is and the pertinent financial details associated with each subaward.



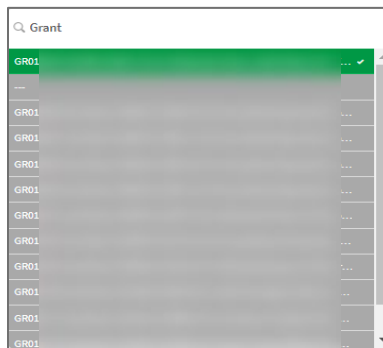
Note: The **Basis Limit Amount** indicates the amount of direct costs subject to F&A, not the amount of F&A that will be charged. For subawards that have a Basis Limit, the **F&A Rate** (ex., .615) will be multiplied against the **Basis Limit Amount** instead of the full **Subaward Direct Cost Budget** amount. The result of this calculation is the **F&A Limit Amount**.

SubAward Direct Cost Budget	Q	Basis Type	Q	Basis Limit Amount	Q	F&A Rate	Q	F&A Limit Amount	Q
0.00		MTDC		0.00		0.615		0.00	
86,641.00		MTDC		25,000.00		0.615		15,375.00	

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How to View Details on Clinical Trial Balances

1. Click the **Clinical BBA** button at the top of the page.
2. If you have not selected the Grant already, use the Grant filter table to find and select it:



In the **Budget Balance Available** table:

3. Expand any of the line items by clicking the to drill down to the desired level of detail (direct and indirect).
 - a. The **Clinical Financing** column equals the total invoice revenue received from the sponsor.

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4. View information about individual invoices associated with this grant.
 - a. Click on the blue Customer Invoice number to view the full invoice in Workday.

	<p>Note: If Workday states “No results for “CI-#####,” click on <u>More Categories</u>.</p> <div data-bbox="685 382 933 596" style="border: 1px solid black; padding: 5px; text-align: center;"><p>No results for "CI-0000012871"</p><p>Try searching: More Categories</p></div>
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