Welcome to the Sponsored Projects Dashboard (SPD) overview. SPD is a web based system that allows faculty and budget personnel access to financial grant information such as expenditures, budget, and budget available in a real-time, easy to navigate and understand format. Updated 11/18/14
Benefits of the Sponsored Projects Dashboard

- Display of real-time Banner data (e.g. Budget, Expense, Encumbrance, Payroll)
- Online and fully distributed access
- Web-based interface
- Use of existing campus security and access controls (utilizes myBama single sign-on)
- Advance notification of upcoming Award End Dates
- Ad hoc and management reporting capabilities
Log into myBama
Click on Research Tab
To access SPD, click on the crimson logo at the top left.
### My Grants:

<table>
<thead>
<tr>
<th>GRANT</th>
<th>TITLE</th>
<th>START DATE</th>
<th>END DATE</th>
<th>PI</th>
<th>FUND</th>
<th>BUDGET</th>
<th>EXPENSE</th>
<th>ENCUMBERANCES</th>
<th>AVAILABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>GR24771</td>
<td>Tuscaloosa County Sheriff's Office</td>
<td>4/1/2014</td>
<td>9/3/2014</td>
<td>Stricklin, RH</td>
<td>24771</td>
<td>$40,000.00</td>
<td>$33,300.07</td>
<td>$0.00</td>
<td>$6,639.93</td>
</tr>
<tr>
<td>GR24707</td>
<td>ADMH-Alabama Secure Sharing Utility</td>
<td>2/1/2014</td>
<td>12/31/2015</td>
<td>Hudnall, MC</td>
<td>24707</td>
<td>$334,250.00</td>
<td>$24,778.38</td>
<td>$0.00</td>
<td>$309,471.62</td>
</tr>
<tr>
<td>GR24357</td>
<td>Al Dept of Revenue - Alabama ONE SP</td>
<td>7/25/2013</td>
<td>9/3/2014</td>
<td>Hudnall, MC</td>
<td>24357</td>
<td>$587,500.00</td>
<td>$580,567.06</td>
<td>$0.00</td>
<td>$3,942.94</td>
</tr>
<tr>
<td>GR24529</td>
<td>ADPS/CAPS - Motor Carrier Safety As</td>
<td>10/1/2013</td>
<td>9/3/2014</td>
<td>Parman, AS</td>
<td>24529</td>
<td>$75,000.00</td>
<td>$68,439.85</td>
<td>$0.00</td>
<td>$6,560.14</td>
</tr>
<tr>
<td>GR24866</td>
<td>ADECA - &quot;402 Data and Information T&quot;</td>
<td>10/1/2014</td>
<td>9/3/2015</td>
<td>Stricklin, RH</td>
<td>24866</td>
<td>$842,064.20</td>
<td>$0.00</td>
<td>$196,500.00</td>
<td>$645,564.20</td>
</tr>
</tbody>
</table>

### My Grants Ending within 120 days:

<table>
<thead>
<tr>
<th>GRANT</th>
<th>TITLE</th>
<th>END DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>GR24774</td>
<td>10-8, Inc. Task Order #1: INFRORAT</td>
<td>12/31/2014</td>
</tr>
<tr>
<td>GR24766</td>
<td>ACJC - pr US Department of Homicide</td>
<td>12/31/2014</td>
</tr>
<tr>
<td>GR24443</td>
<td>Madison County - COINS Project: Pha</td>
<td>12/31/2014</td>
</tr>
</tbody>
</table>

### Notes/Policies:

- **Sponsored Project Dashboard Information**
- **OSP/CGA Policies & Procedures**
- **Effort Reporting (ERS)**

**Export My Grants to Excel File;**

**Export My Grants Ending within 120 days to Excel File;**
Faculty will see all current sponsored projects on which they are PI or Co-PI.

- Current = any sponsored project active or ending within the past 120 days.

If >5 awards, pages (1,2,3…) will appear for navigation.

Each row represents one grant and fund combination.

Every column in the gray header bar can be sorted, ascending or descending, by clicking on the column header.

Available balance has not been reduced for:

- Charges in process that have not yet hit Banner.
- F&A (indirect cost) related to direct costs not yet charged.
- Fringe benefit costs related to salaries not yet been paid.
My Grants

- A negative ($) available balance = spending is over-budget.
  - Review and work with your department budget person to determine cause (e.g. encumbrance not released, new funds not added)
  - True overspending should be addressed by working with your department and C&GA to identify expenditures to transfer off the Grant/Fund.

- Any item in red can be clicked on for detailed information.
  - Click on the fund and all data/categories will appear for that fund (see next slide).
  - Click on an amount (e.g. expense) and only the detail for the amount will appear.
Click on a Fund (in **red**) on the My Awards Screen and the budget, expense, encumbrances and available balance will appear for the Fund, by account code (see below).

<table>
<thead>
<tr>
<th>GRANT</th>
<th>FUND</th>
<th>ACCOUNT</th>
<th>ACCT_TITLE</th>
<th>BUDGET</th>
<th>EXPENSE</th>
<th>ENCUMBERANCES</th>
<th>AVAILABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>GR24420</td>
<td>24420</td>
<td>601340</td>
<td>Faculty Research</td>
<td>$24,753.00</td>
<td>$2,222.66</td>
<td>0.00</td>
<td>$22,530.34</td>
</tr>
<tr>
<td>GR24420</td>
<td>24420</td>
<td>601350</td>
<td>Faculty Research - Summer</td>
<td>0.00</td>
<td>$7,333.95</td>
<td>0.00</td>
<td>($7,333.95)</td>
</tr>
<tr>
<td>GR24420</td>
<td>24420</td>
<td>601410</td>
<td>Professional (Exempt)</td>
<td>$69,414.00</td>
<td>$28,595.88</td>
<td>0.00</td>
<td>$40,818.12</td>
</tr>
<tr>
<td>GR24420</td>
<td>24420</td>
<td>602110</td>
<td>Graduate Research Assistant</td>
<td>0.00</td>
<td>$2,250.00</td>
<td>0.00</td>
<td>($2,250.00)</td>
</tr>
<tr>
<td>GR24420</td>
<td>24420</td>
<td>602200</td>
<td>Undergraduate Student Assistant</td>
<td>0.00</td>
<td>$915.00</td>
<td>0.00</td>
<td>($915.00)</td>
</tr>
</tbody>
</table>

Export My Funds to Excel File;
Drill Down Further to Transactions

On the Fund screen, click on the Budget, Expense or Encumbrance amount and the transaction details will be displayed (see example for expense, below).
Drill Down to Salary (Who Was Paid)

Salary expense transactions are payroll feeds. On the Fund screen, click on a salary amount and various “F” documents will be listed, each representing a payroll feed to Banner. The link “click for show/hide payroll details” beside the “F” document can be clicked on for further details (last name, first and middle initial and amount charged via that document).
Export to Excel

Export capability is available for most all sections including Awards, Fund and detail. See examples below:
## Awards Ending Within 120 Days:

### My Grants Ending within 120 days:

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<td>ACJIC - p/t US Department of Homeland</td>
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<tr>
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<td>Madison County - COINS Project: Pha</td>
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Export My Grants Ending within 120 days to Excel File;
Awards Ending Within 120 Days:

- Provides a listing of sponsored projects ending within the next 120 days on which the Faculty is PI or Co-PI.

- No cost extensions must be requested through the Office for Sponsored Programs.
  - Many agencies will allow a one time extension but these requests must be submitted in a timely manner (agency specific - e.g. 30 days prior to end date).
  - OSP staff contact information can be found at: [http://osp.ua.edu/site/osp_staff_listings.html](http://osp.ua.edu/site/osp_staff_listings.html).

- If a no cost extension is not necessary or available:
  - Ensure all expenditures allocable to the project are incurred prior to the end date.
  - Work with your department budget person to ensure expenses are charged to the sponsored project in a timely manner (e.g. submit travel voucher, support for pCard charges, etc.).
  - Financial closeout must typically be completed within 90 days or less after award end-date (occasionally in as little as 15 days).
Notes/Policies

- Notes
  - This section is for OSP/CGA to provide important information, such as upcoming events or changes, that may be useful during the Sponsored Projects life cycle.

- Policies
  - A link to our SPD webpage will always be listed.
  - A link to our current Policies & Procedures will always be listed.
  - A link to ERS (Effort Reporting System) will also be listed along with information on upcoming opening and closing periods for effort certification.
Questions

- About particular expenditures, budgets, etc.
  - Go to your department budget person.
  - Also feel free to contact your accountant in Contract and Grant Accounting (listing at: [http://osp.ua.edu/cga_staff_listings.html](http://osp.ua.edu/cga_staff_listings.html)).

- About the Sponsored Projects Dashboard:
  - Tammy Hudson, thudson@fa.ua.edu, 348-8117.