

Dashboard Purpose & Data Flow

- The Award Financial Dashboard is a Power BI reporting tool that gives PIs and administrators a consolidated view of sponsored award financial activity.
- Workday data flows through UM's data warehouse into Power BI; dashboard financial data refreshes nightly, while payroll-related data follows the bi-weekly payroll/accounting-date cycle.
- **Workday remains the source of truth.** Any discrepancy identified in the dashboard must be validated and corrected through Workday or the appropriate ORA process.
- The dashboard includes sponsored program awards linked to AWD/GR activity. Awards more than 120 days past contract end date are excluded, and new awards appear only after financial activity posts to the General Ledger.

Access & Onboarding

- Users should **first** run the [BI Finance User Security Setup report](#) to confirm Workday grant roles and BI Finance Security Table status.
- If the BI Finance Security Table status is missing, follow Step 2 instructions on the report and submit a General Support incident ticket requesting the user's Workday data be enabled for Power BI access; medium urgency is sufficient for this data request.
- Access generally becomes available within 24-48 hours after IT approval and the overnight refresh. Administrators can support PIs through the same process individually.

Dashboard Navigation & Key Uses

- **Portfolio Summary / Award Summary:** Shows sponsor, PI, grant details, F&A rate, budget days remaining, budget, expenses, unobligated balance, and burn rate indicator.
- **Burn Rate Indicator:** Supports spend pacing across the full life of the grant using green, yellow, and red thresholds that vary by ramp-up, steady-state, and wind-down periods.
- **Budget to Actuals:** Displays direct, indirect, unbudgeted, and total balances, with drill-up/drill-down functionality and filters by cost center, award, grant, and PI.
- **Labor, Non-Salary, Transactions, and Purchase Orders:** Provide additional reconciliation views, including salary detail, non-salary expenses, transaction-level details, and PO/supplier searches.
- **Usability Tools:** Clear selections, reset filters, focus mode, sorting, full-screen view, and exports to Excel, PDF, or PowerPoint support user review and presentation needs.

Clarifications & Limitations

- Commitments/obligations and cash collected are not currently included; use the Sponsored Program Monitoring Report or Clinical Trials Monitoring Report in Workday for cash-received questions.
- Payroll accounting adjustments display by accounting date, not the original pay period. If payroll is routed to a default fund and not a GR driver, it will not appear until correctly allocated and refreshed.
- Deficits, missing IDCs, missing budget years, or unallocated carryforward should be validated in Workday and routed to the appropriate ORA or award setup contact.

Resources & Support

- **Live training/office hours:** Every Friday, 10:00-11:00 AM, hosted by Lionel Vera – [Join the Meeting](#).
- **Dashboard access:** [OVPRS Website](#) and [Award Financial Dashboard Power BI Report](#).
- **Contacts:** Lionel Vera LVer@med.miami.edu for Workday/award-specific questions; Stephane Malebranche smalebranche@miami.edu for post-award questions; OVPRS Help Desk ovprshelpdesk@miami.edu for general dashboard support; Nick Burry n.burry@miami.edu, or the relevant ORA department manager for award setup or budget allocation issues.