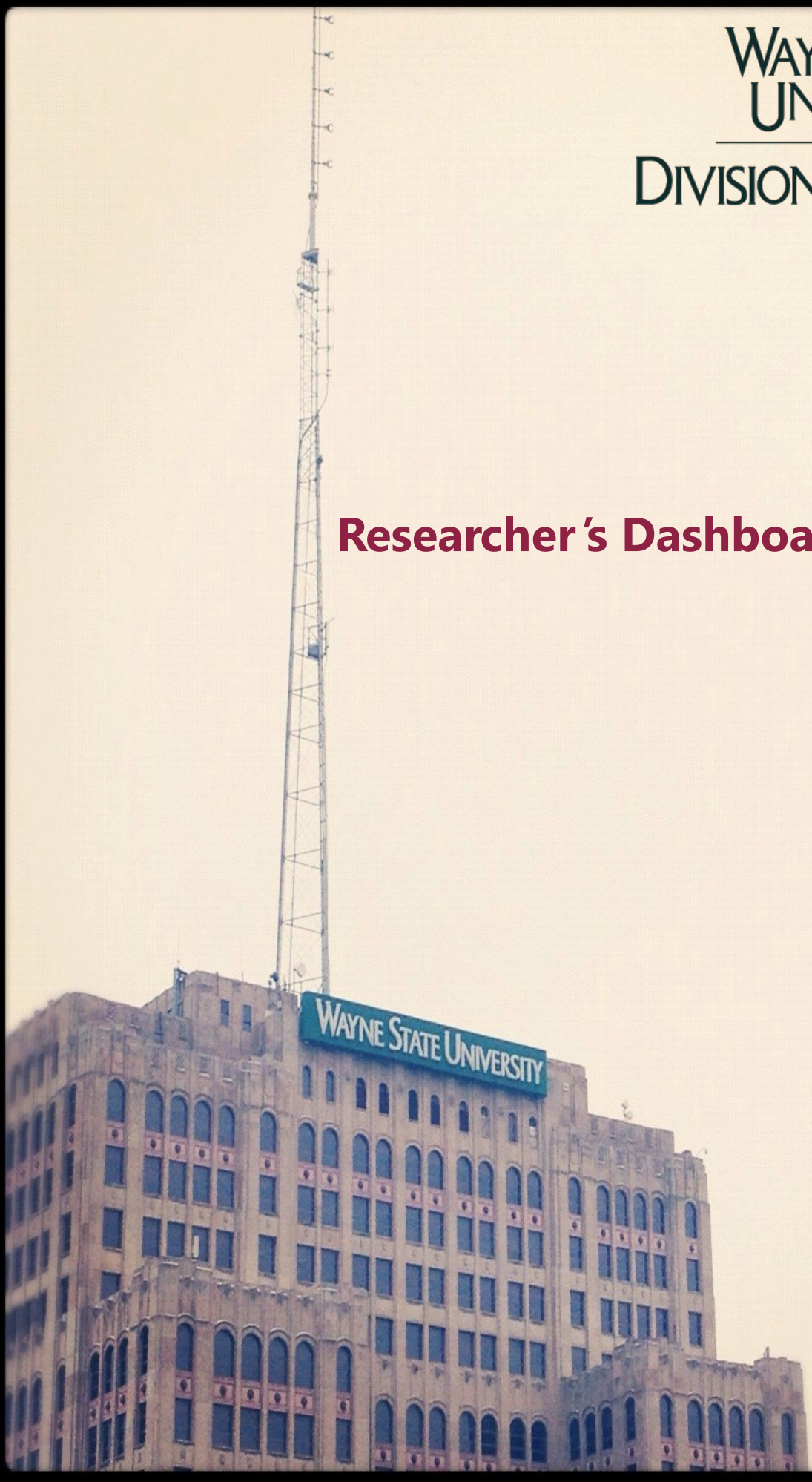
WAYNE STATE UNIVERSITY

DIVISION OF RESEARCH

Researcher's Dashboard User Guide



Introduction

Welcome! This manual introduces the purpose and functionality of the Researcher's Dashboard for gathering useful information regarding proposals, awards, contracts and effort reporting. Researcher's Dashboard allows users to view this information in one central location and is presently available for Principal Investigators (PIs) and Unit Administrators, assisting in the effective management of research business.

Accessing Dashboard

The Researcher's Dashboard is easily accessible via WSU's Academica. Once logged into Academica with an Access ID and password, navigation to the Researcher's Dashboard is simple and intuitive.

Viewing Proposal, Award, and Contract Information

Dashboard provides a central point for viewing existing proposal, award and contract information, including:

- Proposal, Award & Contract information for individual researchers
- Unit Proposal, Award & Contract information (Departmental Administrator access)
- Status, date and budget information
- Budget details
- Personnel information
- Related uploaded documents

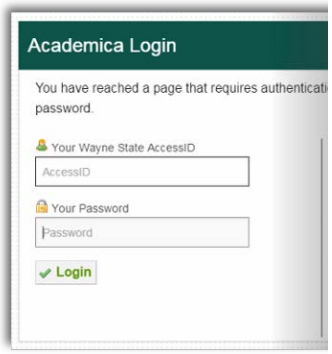
Navigation

Researcher's Dashboard provides clear and simple links for navigation. It also shows the current navigation path at the top of the screen so backtracking is easy, if needed. This path is casually referred to as "breadcrumbs". Clicking on any part of the breadcrumb trail returns to that point in the navigation path.

Navigation of Dashboard for PIs and Unit Administrators is similar. However, Unit Administrators typically have access to all proposal and grant information of a unit, whereas the PI only access has access to his or her proposal and grant information.

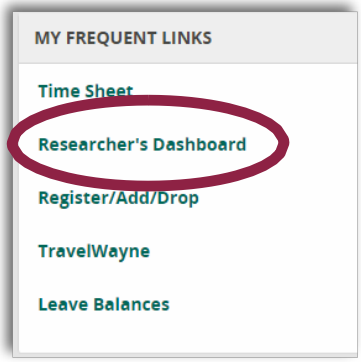
LOG ON TO THE DASHBOARD

1. **Log on to WSU's Academica using Access ID login information.**



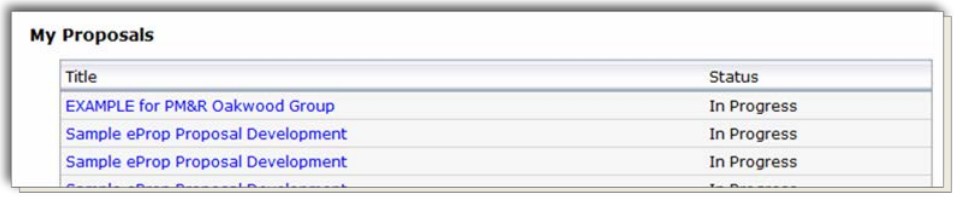
If the 'Research' tab on Academica is not present, there is no record of proposal or grant information in process. If access is needed, please contact Ms. Jody Cooper, SPA Office Manager — 577-3726

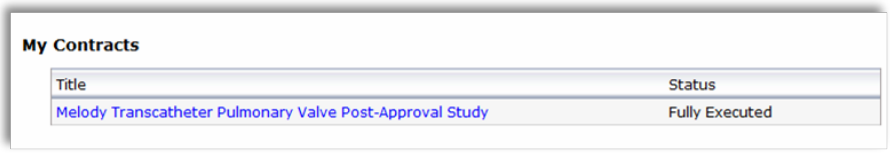
2. **Click 'Researcher's Dashboard' in My Frequent Links section.**

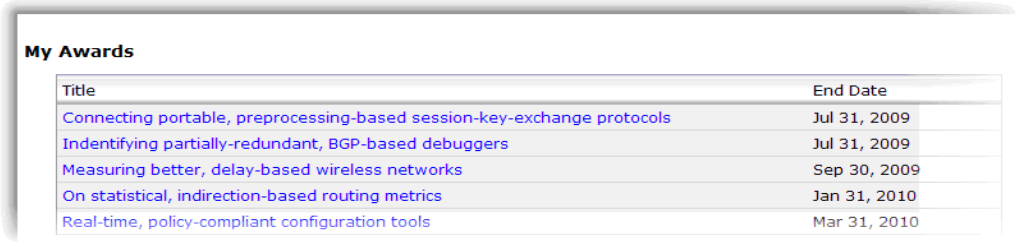


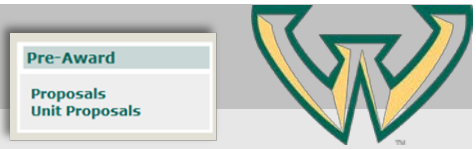
The Dashboard homepage displays.

A list of Proposals, Awards, Contracts and Effort Commitments for the Principal Investigator and/or the Unit populates. <u>Department Administrators have access to all unit information.</u>

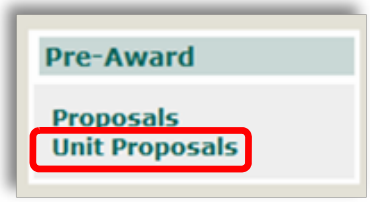




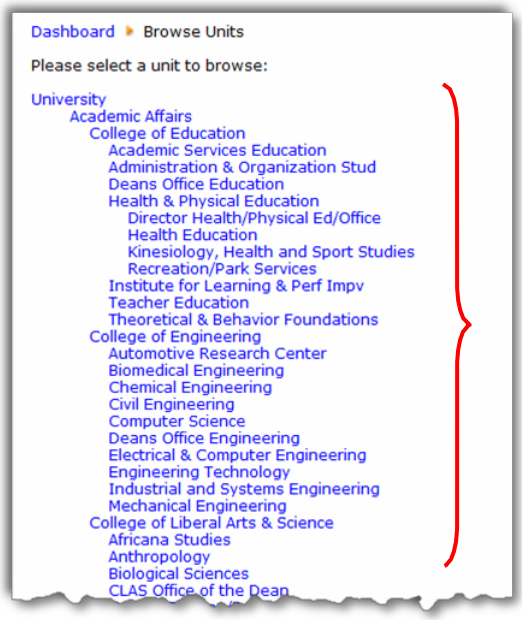




1. **To view proposals for a particular business unit, click Unit Proposals under the Pre-Award menu.**

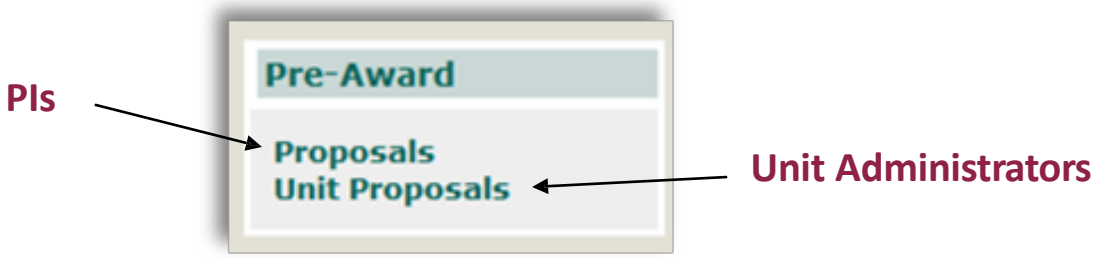


2. **Select Unit to view PI proposal summaries.**

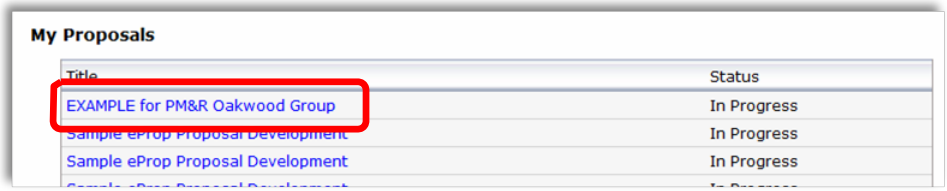


3. **Select Principal Investigator name within the Unit to view all proposals for that PI.**

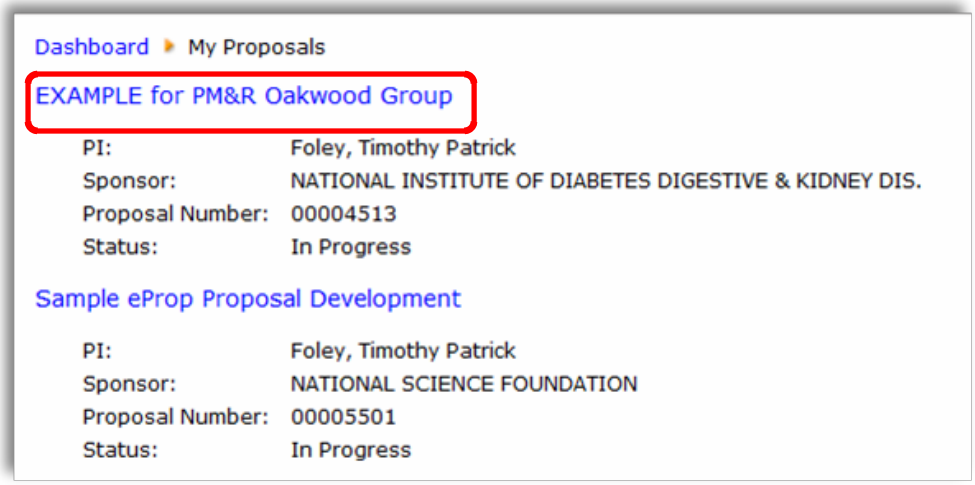
1. Principal Investigator access click Proposals; Unit Administrators and those with departmental access click Unit Proposals under the Pre-Award menu.



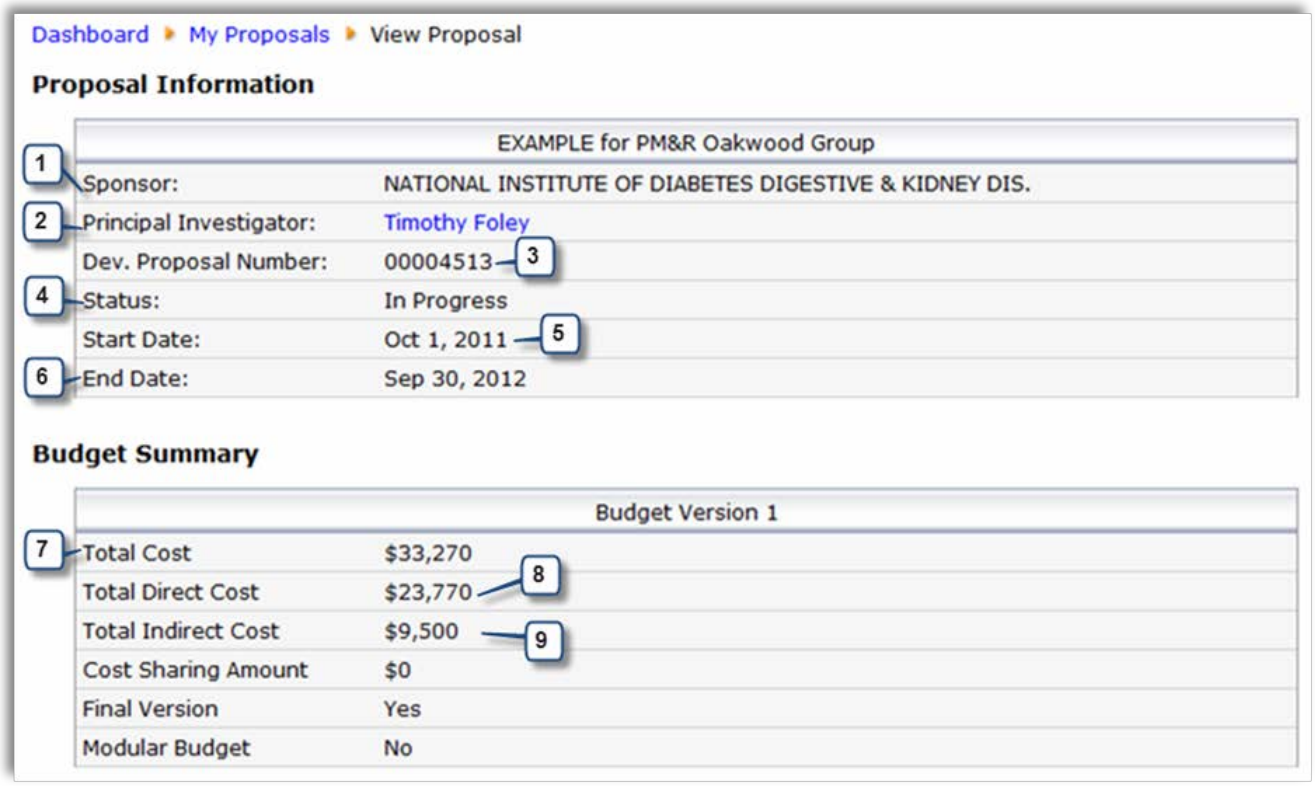
2. Select Proposal to view Proposal Summary.



3. Select Proposal from Summary to view detail.



4. View Summary Proposal Information.



1. **Sponsor: Agency to whom proposal is submitted for funding**
2. **Principal Investigator: Lead researcher on project**
3. **Proposal Number: Coeus-generated number associated with proposal record**
4. **Status: Proposal status > In Progress; Approved**
5. **Start Date: Proposed start date of project**
6. **End Date: Proposed end date of project**
7. **Total Cost: Total cost of entire project period**
8. **Total Direct Cost: Total direct cost of entire project period**
9. **Total Indirect Cost: Total indirect cost of entire project period**

DASHBOARD: VIEW PROPOSALS/UNIT PROPOSALS: **DETAILS**

1. **Select a Detail category to view specific detailed proposal information.**

Approval Status : **details where in the approval process the proposal resides**

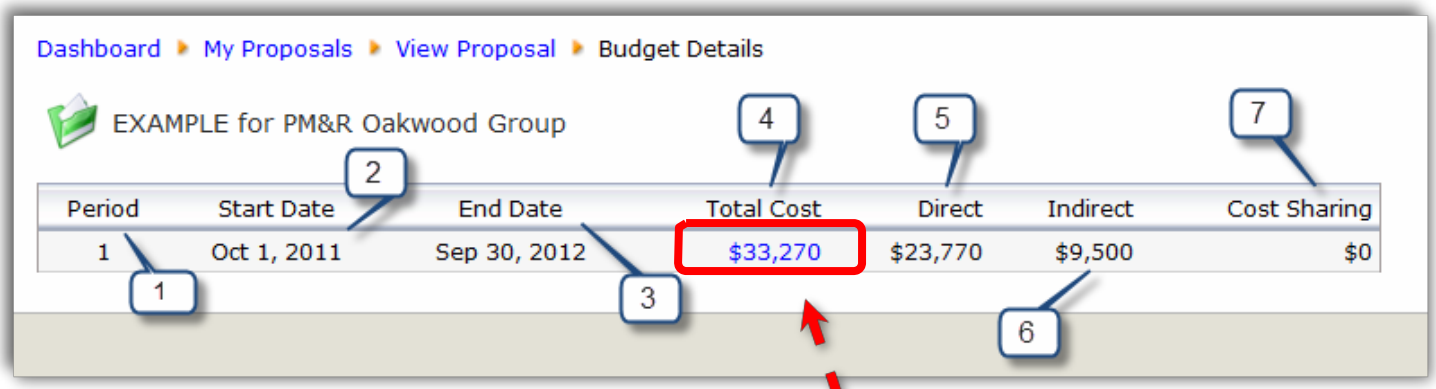
Budget Details: **provides proposal budget information**

Documents: **a directory of corresponding proposal support documents**

Personnel: **a roster of individuals associated with the proposal—Principal Investigator, Co-PIs, Key Persons**

Access Control: **allows PI to grant Dashboard record access to those listed as a Co-PI or Key Person on the Cayuse proposal submission**

BUDGET DETAILS



1. **Proposal Period**
2. **Proposed Project Start Date**
3. **Proposed Project End Date**
4. **Total Period Cost**
5. **Total Period Direct Cost**
6. **Total Period Indirect Cost**
7. **Period Cost Sharing**

Select Total Cost hyperlink to see entire period budget detail.

VIEW PROPOSALS/UNIT PROPOSALS: **PROPOSAL DETAILS: BUDGET PERIOD**

Budget details match information entered in Cayuse

EXAMPLE for PM&R Oakwood Group

Personnel

Senior Personnel

Name	Start	End	Charged	Effort	Fringes	Salaries
Foley, Timothy Patrick	10/01/11	09/30/12	10%	10%	$2,520	$10,000
					$2,520	**$10,000**

Personnel Summary

Description	Amount
Total Salaries and Wages	$10,000
Fringe Benefits	$2,520
Total Salaries, Wages and Fringe Benefits	$12,520

Non-Personnel Expenses

Materials

Description	Cost
Lab Supplies	$2,000
	$2,000

Publication Costs/Documentation/Dissemenation

Description	Cost
No description	$750
	$750

Travel - Domestic

Description	Cost
Conference	$3,000
	$3,000

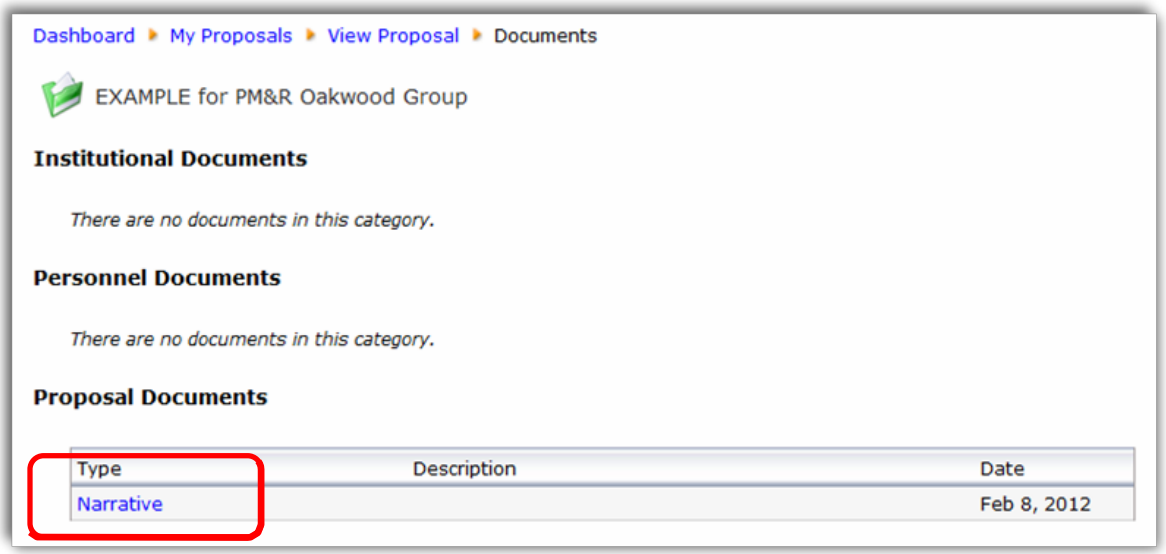
Equipment

Description	Cost
No description	$5,500
	$5,500

Period Summary

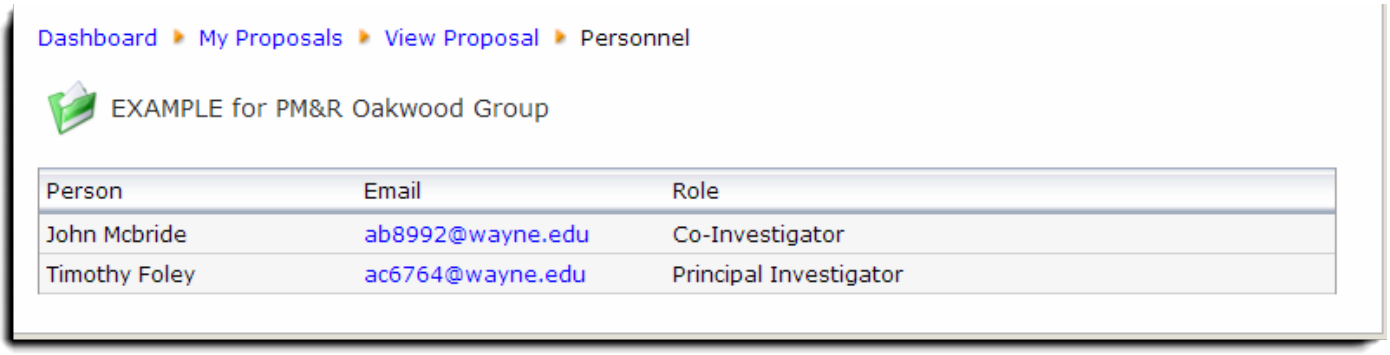
Description	Amount
Total Direct Cost	$23,770
Total Indirect Costs	$9,500
Total Cost to Sponsor	$33,270
Total Underrecovery	-$2,192
Total Cost Sharing	$0
Total Cost of Project	$31,078

VIEW PROPOSALS/UNIT PROPOSALS: **PROPOSAL DETAILS: DOCUMENTS**



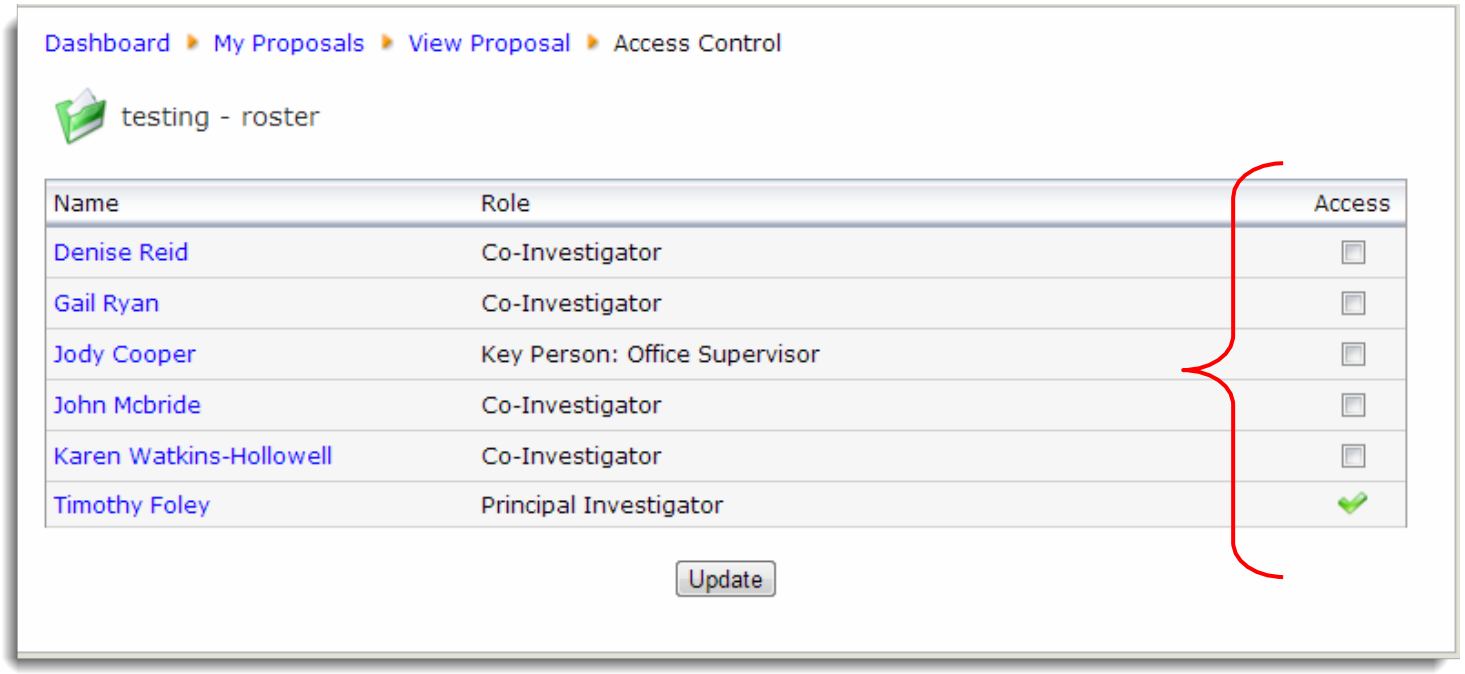
- **Select the Documents detail category to view any attachments of the corresponding Cayuse submission**

VIEW PROPOSALS/UNIT PROPOSALS: **PROPOSAL DETAILS: PERSONNEL**



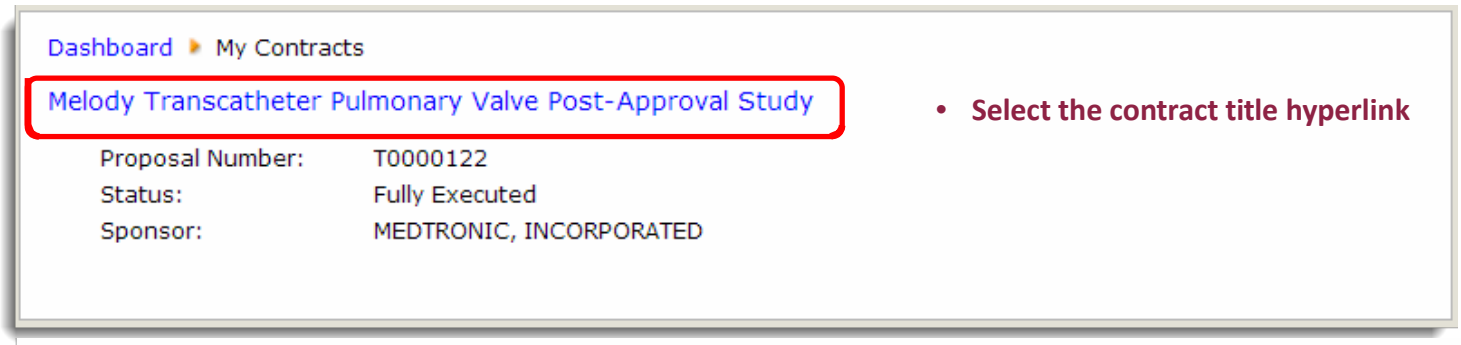
- **Select the Personnel detail category to view all people to be paid from project budget**

VIEW PROPOSALS/UNIT PROPOSALS: **PROPOSAL DETAILS: ACCESS CONTROL**



- **Access Control allows Principal Investigators to grant access of the Dashboard record to any person listed as a Co-PI or Key Person; select corresponding box and update record to complete.**

VIEW CONTRACTS/UNIT CONTRACTS: NEGOTIATION TIMELINE



- **Select the contract title hyperlink**

Melody Transcatheter Pulmonary Valve Post-Approval Study	
Sponsor:	MEDTRONIC, INCORPORATED
Principal Investigator:	Timothy Foley
Proposal Number:	T0000122
Status:	Fully Executed

- **View entire negotiation action history from inception to execution**

Action History

✔ **Nov 29, 2011 - Fully Executed Document Sent**

Fully executed NDA sent to sponsor via email

✔ **Nov 29, 2011 - Requested Authorized Signature**

To Patty for signature

✔ **Nov 29, 2011 - Requested PI Signature**

To PI for signature via email

✔ **Nov 28, 2011 - Document Sent to OGC for Approval Stamp**

Sponsor approved changes and sent final. To OGC for approval.

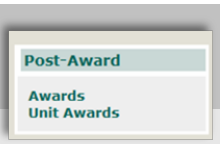
✔ **Nov 21, 2011 - Document Sent to Sponsor for Review**

Sent to sponsor with changes requested

✔ **Nov 15, 2011 - Document Sent to OGC for Review**

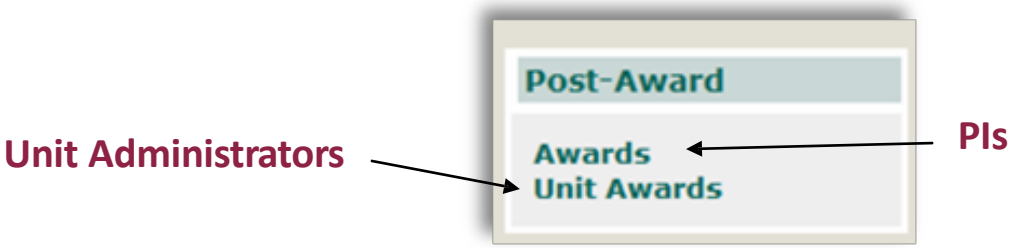
Sent to OGC for initial review

✔ **Nov 15, 2011 - Received by Contract Officer**

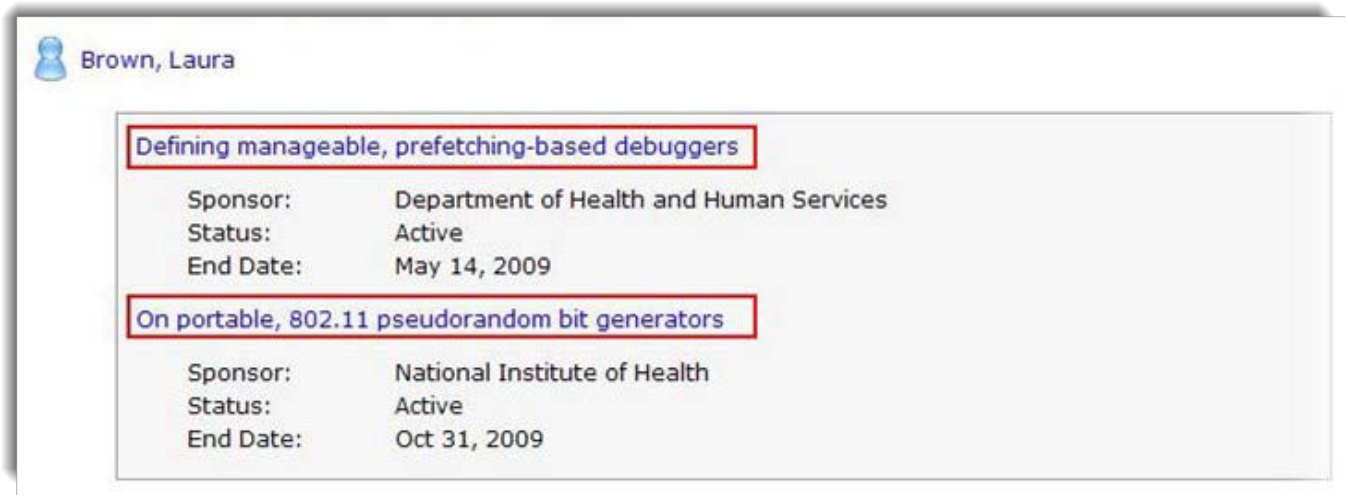


DASHBOARD: **VIEW AWARDS/UNIT AWARDS**

1. **Principal Investigator access click Awards; Unit Administrators and those with departmental access click Unit Awards under the Post-Award menu.**



2. **Select Award from Summary to view detail.**

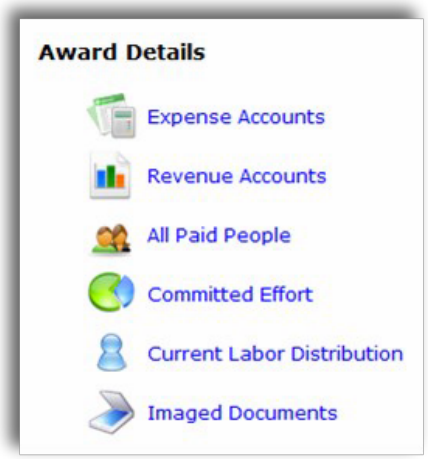


SELECT AN AWARD TO VIEW

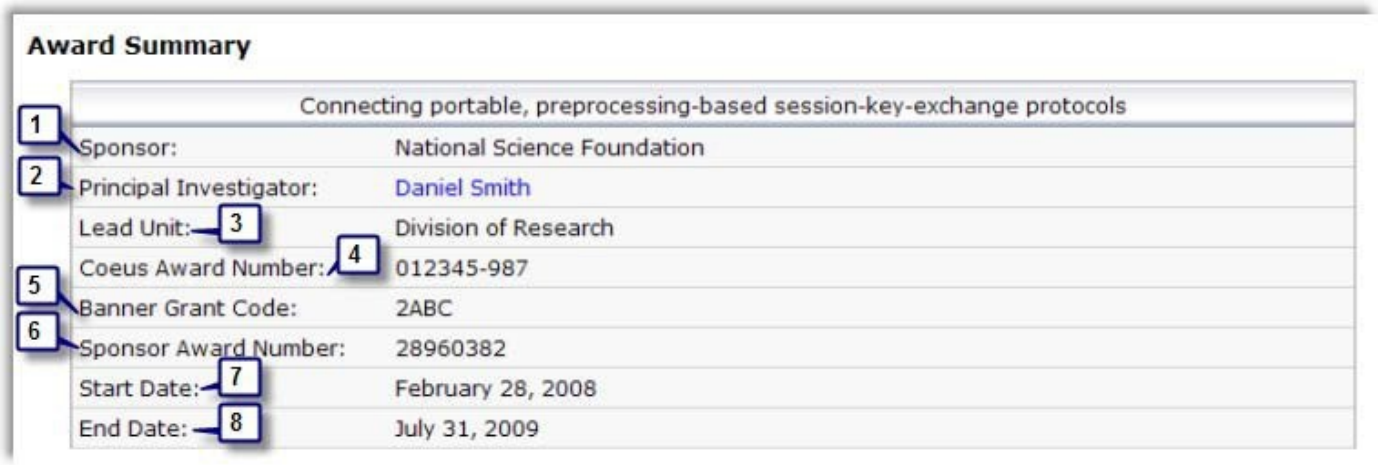
Click any award to view the information for that award.

The View Award page will display with the following three sections:

- **Award Summary: This section provides a high-level overview of award details.**
- **Accounting Summary: This section provides a high-level overview of accounting details:**
- **Award Details: This section provides links to additional details.**

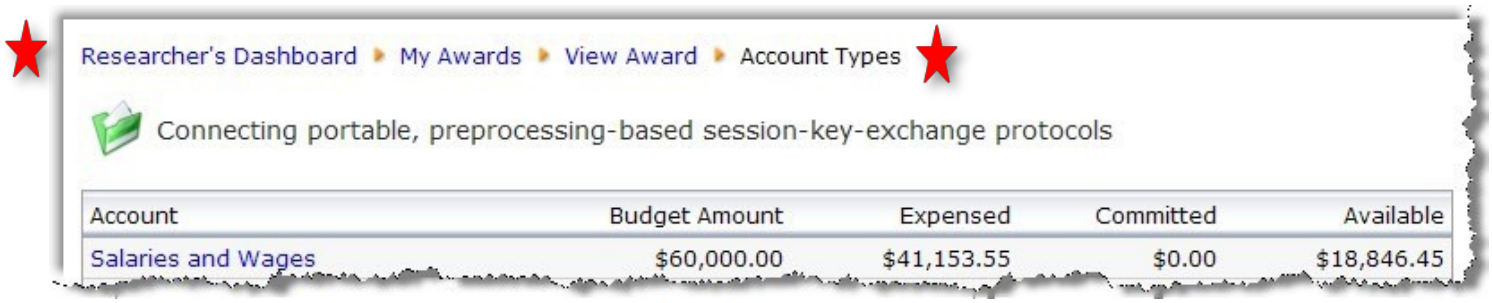


The Award Summary provides an overview of grant and cost-share information. Review the following fields to learn more.



1. **Sponsor: The sponsor listed on the award.**
2. **Principal Investigator: The name of the principal investigator listed on the award.**
3. **Lead Unit: The lead business unit assigned to the award.**
4. **Coeus Award Number: A unique 9-digit number used to identify the award in the Coeus system.**
5. **Banner Grant Code: A unique number to identify the award in Banner.**
6. **Start Date: The date that the research for which the award was given is scheduled to begin.**
7. **End Date: the date that the research for which the award was given is scheduled to end.**

REMINDER: breadcrumbs at the top of the page display how you have gotten to any point in Dashboard.

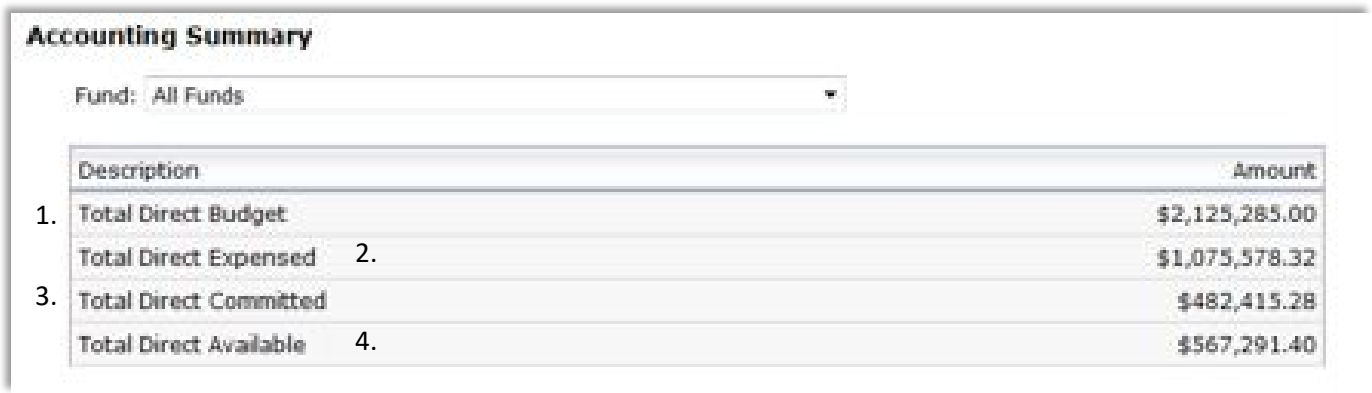


1. **Navigation began at the Dashboard home page. (Researcher's Dashboard)**
2. **Next, Awards was clicked to display a list of awards. (My Awards)**
3. **Then, a specific award was selected. (View Awards)**
4. **Finally, an account was selected to view. (Account Types)**

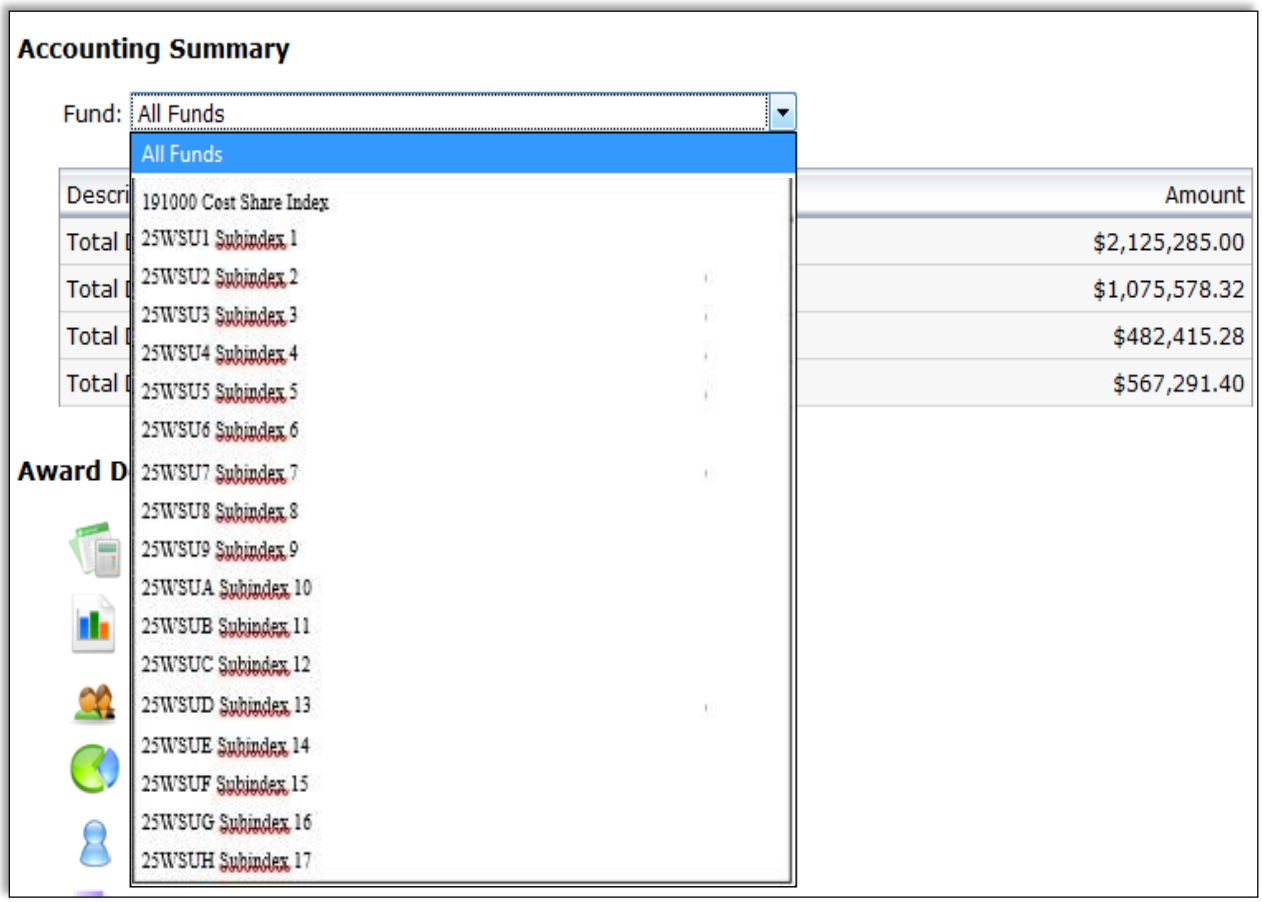
Any part of the breadcrumb trail that appears as blue text may be clicked to return to that point in navigation.

AWARD SUMMARY

The Accounting Summary provided a snapshot of the current status of the award budget. Review the following fields to learn more. These amounts only reflect Direct Cost totals and/or cost-share. They do not include Indirect Cost amounts.

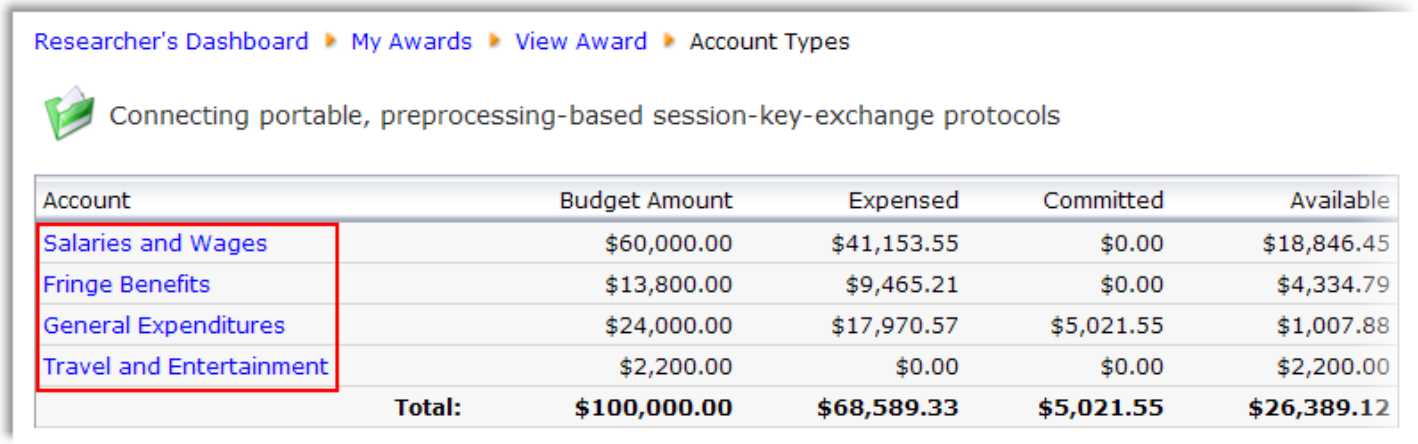


1. **Total Budget: The sum of the revenue, committed, and available funds**
2. **Total Expensed: Funds that have already been sent.**
3. **Total Committed: Funds that have been earmarked to spend, but have not yet been spent.**
4. **Total Available: Available funds, which is the revenue less the expensed and committed funds.**



AWARD DETAILS > ACCOUNTING

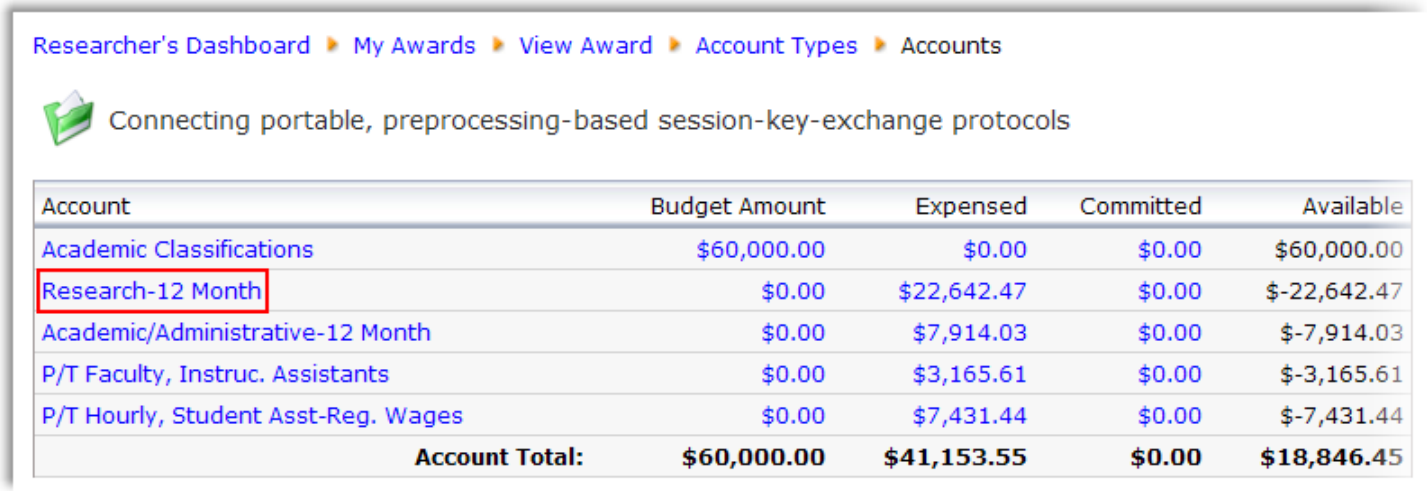
Once you select Accounting under Award Details, you will see a list of account types.



Account		Budget Amount	Expensed	Committed	Available
Salaries and Wages		$60,000.00	$41,153.55	$0.00	$18,846.45
Fringe Benefits		$13,800.00	$9,465.21	$0.00	$4,334.79
General Expenditures		$24,000.00	$17,970.57	$5,021.55	$1,007.88
Travel and Entertainment		$2,200.00	$0.00	$0.00	$2,200.00
	Total:	**$100,000.00**	**$68,589.33**	**$5,021.55**	**$26,389.12**

AWARD DETAILS > ACCOUNTING DETAILS- CONTINUED

Once an account type is selected, specific accounts are listed under that account type.

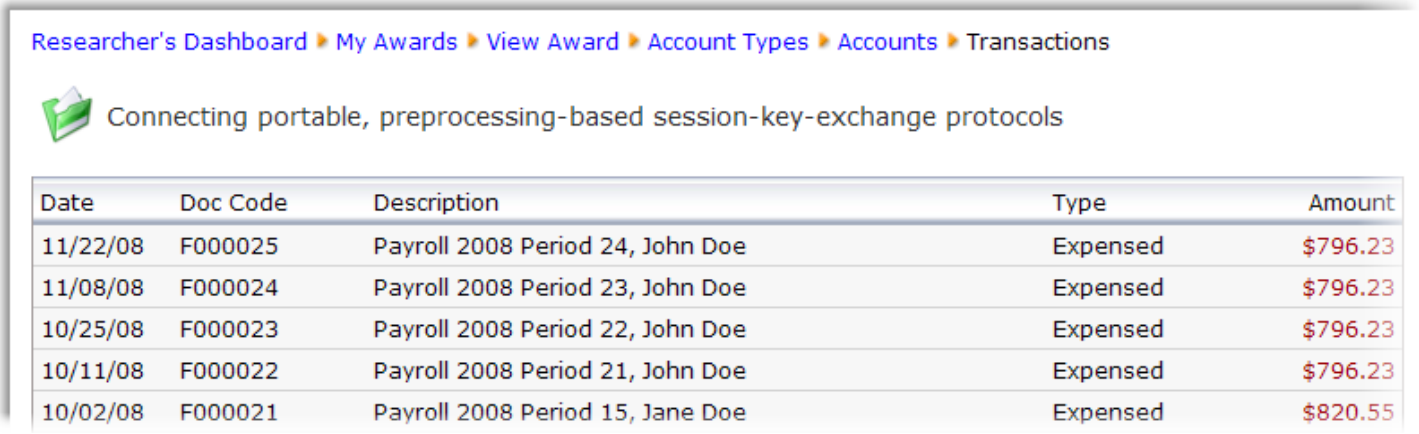


Researcher's Dashboard ▸ My Awards ▸ View Award ▸ Account Types ▸ Accounts

Connecting portable, preprocessing-based session-key-exchange protocols

Account	Budget Amount	Expensed	Committed	Available
Academic Classifications	$60,000.00	$0.00	$0.00	$60,000.00
Research-12 Month	$0.00	$22,642.47	$0.00	$-22,642.47
Academic/Administrative-12 Month	$0.00	$7,914.03	$0.00	$-7,914.03
P/T Faculty, Instruc. Assistants	$0.00	$3,165.61	$0.00	$-3,165.61
P/T Hourly, Student Asst-Reg. Wages	$0.00	$7,431.44	$0.00	$-7,431.44
Account Total:	**$60,000.00**	**$41,153.55**	**$0.00**	**$18,846.45**

Click any of these specific accounts, such as Scholarships and Fellowships, to see all transaction types for that account. (Budget Amount, Expensed, and Committed)



Researcher's Dashboard ▸ My Awards ▸ View Award ▸ Account Types ▸ Accounts ▸ Transactions

Connecting portable, preprocessing-based session-key-exchange protocols

Date	Doc Code	Description	Type	Amount
11/22/08	F000025	Payroll 2008 Period 24, John Doe	Expensed	$796.23
11/08/08	F000024	Payroll 2008 Period 23, John Doe	Expensed	$796.23
10/25/08	F000023	Payroll 2008 Period 22, John Doe	Expensed	$796.23
10/11/08	F000022	Payroll 2008 Period 21, John Doe	Expensed	$796.23
10/02/08	F000021	Payroll 2008 Period 15, Jane Doe	Expensed	$820.55

AWARD DETAILS > ACCOUNTING DETAILS- CONTINUED

To view one transaction type, simply click the dollar amount for the account under that heading. Transactions only of that type will populate.

Researcher's Dashboard ▸ My Awards ▸ View Award ▸ Account Types ▸ Accounts

Connecting portable, preprocessing-based session-key-exchange protocols

Account	Budget Amount	Expensed	Committed	Available
Academic Classifications	$60,000.00	$0.00	$0.00	$60,000.00
Research-12 Month	$0.00	$22,642.47	$0.00	$-22,642.47
Academic/Administrative-12 Month	$0.00	$7,914.03	$0.00	$-7,914.03
P/T Faculty, Instruc. Assistants	$0.00	$3,165.61	$0.00	$-3,165.61
P/T Hourly, Student Asst-Reg. Wages	$0.00	$7,431.44	$0.00	$-7,431.44
Account Total:	**$60,000.00**	**$41,153.55**	**$0.00**	**$18,846.45**

AWARD DETAILS – CURRENT LABOR DISTRIBUTION

Here you can view a list of employees who are *currently* being charged to the award.

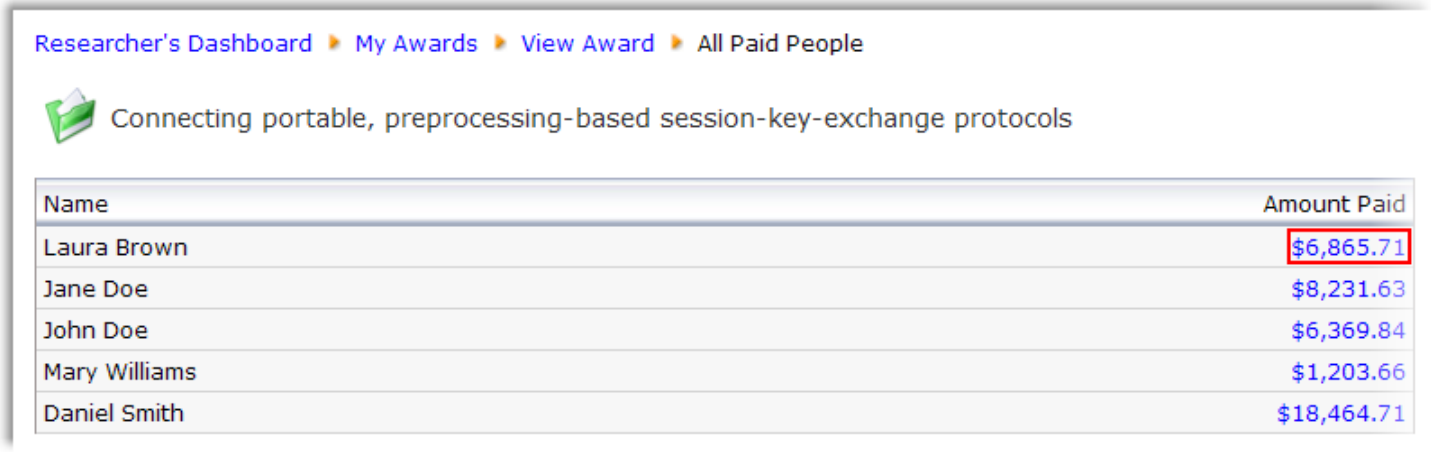
Researcher's Dashboard ▸ My Awards ▸ View Award ▸ Current Labor Distribution

Connecting portable, preprocessing-based session-key-exchange protocols

Name	Position Number	Fund Code	Percent
Jane Doe	P00001-01	2ABC1	100%
John Doe	P00002-01	2ABC2	5%
Daniel Smith	H00003-01	2ABC1	100%

View a list of employees who have drawn pay from the award from at any time during the research project.

A breakdown of all money paid to an employee can be viewed by clicking the dollar amount in the Amount Paid column.

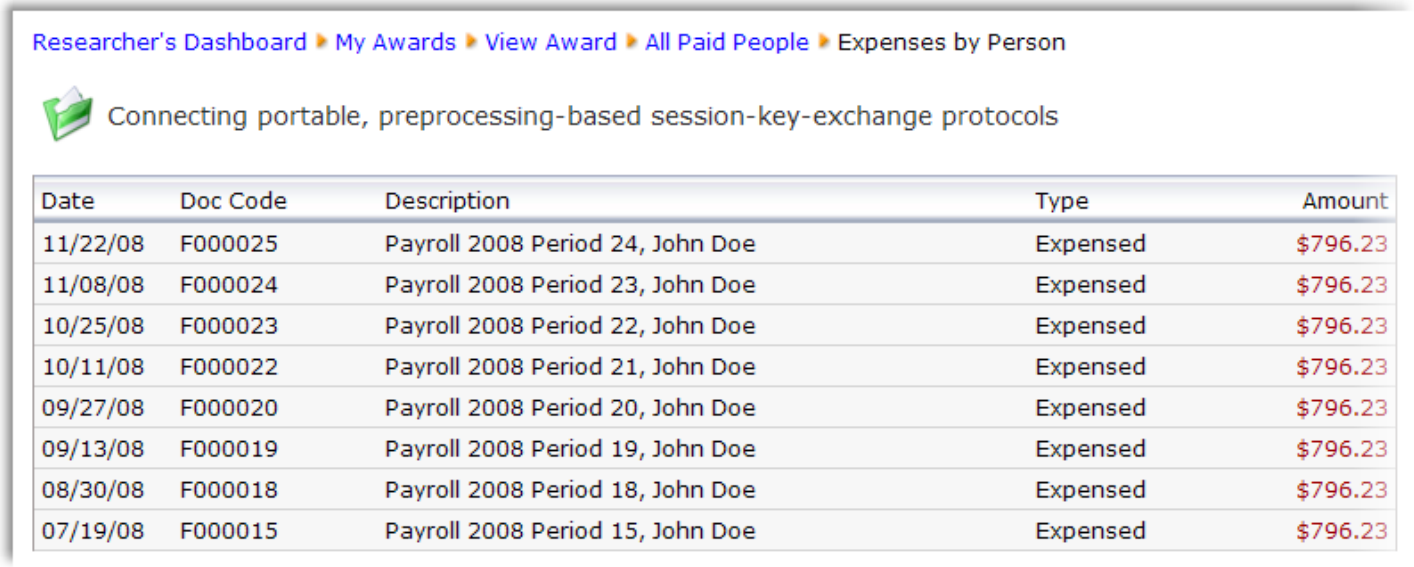


Researcher's Dashboard ▸ My Awards ▸ View Award ▸ All Paid People

Connecting portable, preprocessing-based session-key-exchange protocols

Name	Amount Paid
Laura Brown	$6,865.71
Jane Doe	$8,231.63
John Doe	$6,369.84
Mary Williams	$1,203.66
Daniel Smith	$18,464.71

Click the Amount Paid for an employee, to see a list expenses for that person.

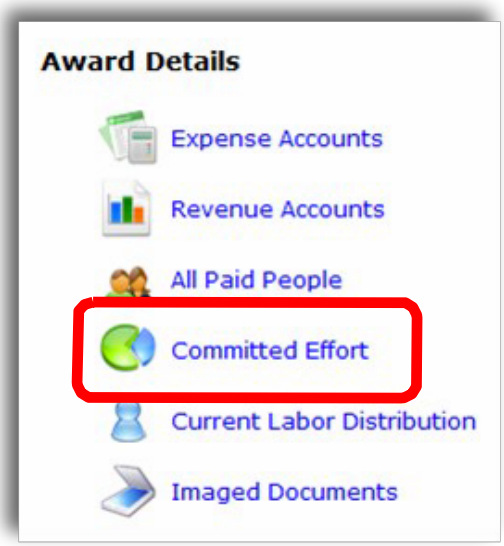


Researcher's Dashboard ▸ My Awards ▸ View Award ▸ All Paid People ▸ Expenses by Person

Connecting portable, preprocessing-based session-key-exchange protocols

Date	Doc Code	Description	Type	Amount
11/22/08	F000025	Payroll 2008 Period 24, John Doe	Expensed	$796.23
11/08/08	F000024	Payroll 2008 Period 23, John Doe	Expensed	$796.23
10/25/08	F000023	Payroll 2008 Period 22, John Doe	Expensed	$796.23
10/11/08	F000022	Payroll 2008 Period 21, John Doe	Expensed	$796.23
09/27/08	F000020	Payroll 2008 Period 20, John Doe	Expensed	$796.23
09/13/08	F000019	Payroll 2008 Period 19, John Doe	Expensed	$796.23
08/30/08	F000018	Payroll 2008 Period 18, John Doe	Expensed	$796.23
07/19/08	F000015	Payroll 2008 Period 15, John Doe	Expensed	$796.23

View a list of employees and their committed effort on a research project. This information can be accessed either by the Dashboard main page menu or the Award Details link 'Committed Effort'.



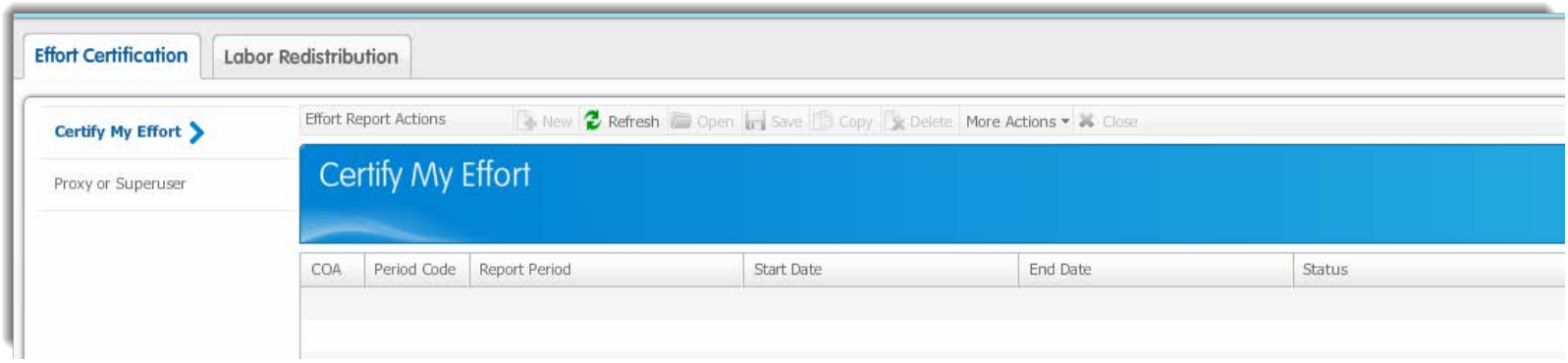
Committed Effort associated with PIs, Co-PIs and Key Personnel populates.

ABI: Novel Tools for the Analysis & Interpretation of Gene Signaling Pathways

Project End Date: July 31, 2013

Name	Calendar %	Academic %	Summer %
[redacted]	16.7%	0%	0%
[redacted]	0%	0%	0%
[redacted]	5%	0%	0%

Select 'Effort Certification' to complete the certification process for all PIs, Co-PIs and Key Personnel on sponsored projects.



Instructions for the Effort Certification process can be found here.

AWARD DETAILS - ICONS

1. Expense Accounts – This takes you to a summary screen that shows you expenses by type. You can click the "All Funds" box to limit the field to a specific index.

Fund: All Funds

Account	Budget Amount	Expensed	Committed	Available
Salaries and Wages	$97,339.00	$52,206.62	$0.00	$45,132.38
Fringe Benefits	$39,091.00	$14,322.22	$0.00	$24,768.78
General Expenditures	$1,938,697.00	$990,112.24	$482,415.28	$466,169.48
Travel and Entertainment	$50,158.00	$18,937.24	$0.00	$31,220.76
Total:	**$2,125,285.00**	**$1,075,578.32**	**$482,415.28**	**$567,291.40**

2. Revenue Accounts – This takes you to a summary screen that shows you the revenue received.

3. All Paid People – This screen shows a breakdown of all money paid to an employee since the beginning of the award. You can drill down into the specific charges by clicking the specific amount paid per person. (See page 10 of the Dashboard Guide for an example screenshot.)

4. Committed Effort – This screen shows the payroll effort entered during the index creation. Generally, this is the PI and key personnel.

Project End Date: April 30, 2020

Name	Calendar %	Academic %	Summer %
Prashant Mahajan	25%	0%	0%

5. Current Labor Distribution – This screen shows the employees *currently* being charged to the award. (See page 9 of the Dashboard Guide for an example screenshot.)

6. Fund Summary – This screen is a very helpful summary showing the total budgets, expenses, commitments, and balances for each subindex.

Fund	Budget	Activity	Commitments	Available Balance
2MRZ1	$658,441.00	$280,451.91	$83,963.69	$294,025.40
2MRZ12	$127,696.00	$93,008.63	$9,632.37	$25,055.00
2MRZ13	$67,233.00	$45,257.87	$9,002.13	$12,973.00
2MRZ14	$63,795.00	$25,355.69	$26,233.31	$12,206.00
2MRZ15	$75,756.00	$38,013.57	$26,910.43	$10,832.00
2MRZ16	$58,618.00	$12,958.85	$34,229.15	$11,430.00
2MRZ17	$76,895.00	$52,158.46	$9,962.54	$14,774.00
2MRZ18	$73,997.00	$53,398.23	$6,353.77	$14,245.00
2MRZ19	$53,989.00	$14,624.29	$27,955.71	$11,409.00
2MRZ1A	$71,896.00	$28,382.55	$43,515.45	-$2.00
2MRZ1B	$66,798.00	$43,954.09	$10,047.91	$12,796.00
2MRZ1C	$68,167.00	$34,289.19	$20,956.81	$12,921.00
2MRZ1D	$69,906.00	$7,950.94	$48,520.06	$13,435.00
2MRZ1E	$367,250.00	$280,848.28	$10,960.72	$75,441.00
2MRZ1F	$63,720.00	$39,493.09	$11,843.91	$12,383.00
2MRZ1G	$68,014.00	$3,669.78	$51,152.22	$13,192.00
2MRZ1H	$54,677.00	$21,762.90	$22,418.10	$10,496.00
2MRZ1I	$38,437.00	$0.00	$28,757.00	$9,680.00
Total:	**$2,125,285.00**	**$1,075,578.32**	**$482,415.28**	**$567,291.40**