

University of Richmond

My Budgets

User Guide



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Version 1.00

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Questions on Grants?

For questions...

- About any Federal, State, or Private grant transaction or budget
- About allowable expenses on any current grant
- About compliance on any current grant
- About the My Grants tab of the My Grants report
- About any other information regarding current or past grants

Contact Amanda Salazar in the Grants Accounting Office at 804-289-8178 (Tammy Hicks for NSF Grants at 804-289-8752) or email grants@richmond.edu.

For questions...

- About any proposed or pending Federal, State, or Private grant
- About grant extension requests
- About creation or update to subawards, professional service agreements, or memorandums of understanding

Contact the Office of Foundation, Corporate & Government Relations at fcgr@richmond.edu.

For questions...

- About any internal grant

Contact the finance director in your Dean's office.

Getting Started

My Budgets is a dashboard developed to provide timely financial data to users so they may better manage their funds. Currently, My Budgets only includes the My Grants report but future versions will include other types of funds such as endowment, restricted gifts, and faculty development funds. My Grants is a report that shows summary and detailed financial information on external grants along with select static data to give users a complete picture of their grant budget.

Accessing the My Budgets Report

Accessing the My Budgets report requires the following:

- Permission to access the report in ROADS can be [requested here](#).
NOTE: Users who receive budget reports will automatically be added to this report.
- Must be either on a campus network or logged into the University's VPN.

Link to My Budgets

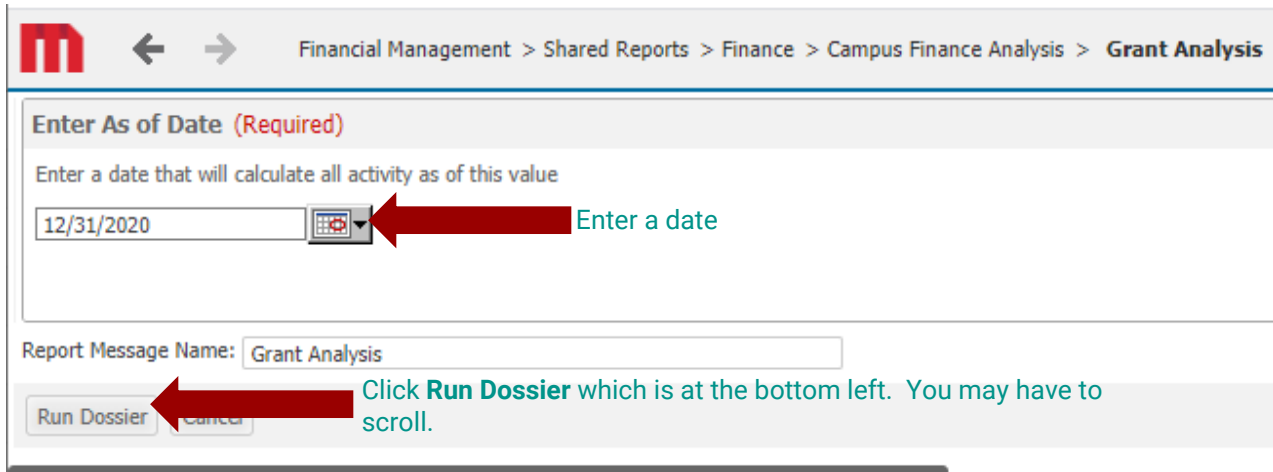
[Click Here](#) to go to the My Budgets reports.

What Budgets/Indexes Will I See?

Users will see any Index assigned to them by the Office of Planning and Budget. If the User receives a monthly budget report for an Index they will also have access to this Index in the My Budgets report. Currently, My Budgets only shows grant indexes.

Running the Report

To run the report, simply click the link above and login using your standard University NetID and Password. The report will automatically load and present the below prompt. Enter the **As of Date** which defaults to the last day of the previous month. Click **Run Dossier** at the bottom of the page.



My Grants

The My Grants tab is an **Inception to Date** report for Federal, State, and Private grants assigned to a User. Inception to Date means the report shows all expenses since the start of the grant.

Layout

Figure 1 shows the overall layout and 4 sections of the My Grants page of the My Budgets report. The grant selected in Section 1 will update the data in the other 3 sections of the report.

NOTE: Users may need to scroll left or right in each section to see all columns.

Expenses in **Section 3 – Grant Expense Summary** are grouped by **Expense Category**. These categories are the most common grouping of expenses for budgets. To expand and see the specific account code, click the + symbol the left of the **Expense Category**. To collapse the category, click the – symbol.

Switching Between Grants

To switch between grants, click on the **Index** number or **Grant Name** in the header row of Section 1.

Sorting

Users can sort columns in **Section 3 – Grant Expense Summary** or **Section 4 – Grant Expense Detail**. To sort a column, right click (Control-click on Mac) on a column header, such as Transaction Date, and select a sort method.

Right Click on a Column Header

Fund	Account	Transaction Date	Description	Document	Amount
Total					
27229I	7101	12/14/2020	Professional & Contract Services	I0998280	
27229I	7101	11/16/2020	Professional & Contract Services	J0192912	
27229I	7101	10/29/2020	Professional & Contract Services	J0192650	

Exporting

Users can export any section of the report by clicking on the ellipsis (3 vertical dots) at the top right of any section.

Click on ellipsis (3 dots) symbol at the top right of any section

Fund	Account	Transaction Date	Description	Document	Amount
Total					
27229I	7101	12/14/2020	SecureHealth and Wellness LLC		\$263,265
27229I	7101	11/16/2020	Recl Secure Health Invoice		\$179,110

Change Date

To change the **As of Date**, click on the re-prompt symbol on the toolbar in the upper-left portion of the report.



Alerts

The **% Budget Remaining** row in **Section 1 – Grant Summary** and **Days Remaining** row in **Section 2 – Grant Data** will highlight if certain thresholds are met. The below are the thresholds for each data point.

% Budget Remaining	0% or Less	0.1 - 10%	10.1 - 25%
Days Remaining	45 Days or Less	46 - 90 days	91 - 180 days

Figure 1 – My Grants Layout

The screenshot displays the 'My Grants' report interface with the following sections:

- Section 1 (Grant Summary):** A table showing budget and expense data for multiple grants. The % Budget Remaining field is highlighted in yellow (5.21%) and green (12.04%).
- Section 2 (Grant Data):** A summary table for a specific grant, including PI Name, Grant Type (Federal), Agency Name (National Science Foundation), CFDA (47.049), Grant Start Date (7/24/2018), Grant End Date (7/31/2021), and Days Remaining (183).
- Section 3 (Grant Expense Summary):** A table summarizing expenses by category, including Total, Salaries & Wages, Fringe Benefits, Supplies, Travel, Equipment, and Indirect Costs.
- Section 4 (Grant Expense Detail):** A table showing detailed transactions with columns for Fund, Account, Transaction Date, Description, Document, and Amount.

Section 3

Section 4

Section 1 – Grant Summary

Shows a summary of each grant **Index** for the User. Click on each **Index** or **Grant Name** to update the other sections of this report. The **% Budget Remaining** field will highlight if certain thresholds are met (see “Alerts”).

Section 2 – Grant Data

Shows basic information for a grant including start and end dates. The **Days Remaining** field will highlight if certain thresholds are met (see “Alerts”).

Section 3 – Grant Expense Summary

Shows expenses summarized by grant **Expense Category**. These categories should mostly correspond to the categories in the approved budget for each grant. To see specific account codes, click the **+** symbol the left of the **Expense Category**. To collapse the category, click the **-** symbol.

Section 4 – Grant Expense Detail

Shows the detailed actual transactions for a particular grant. Budget and commitments transactions will not show in this section. This can be sorted and exported for reconciling purposes.