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.

**Exporting**

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

**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.

<table>
<thead>
<tr>
<th>% Budget Remaining</th>
<th>0% or Less</th>
<th>0.1 - 10%</th>
<th>10.1 - 25%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days Remaining</td>
<td>45 Days or Less</td>
<td>46 - 90 days</td>
<td>91 - 180 days</td>
</tr>
</tbody>
</table>
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.