

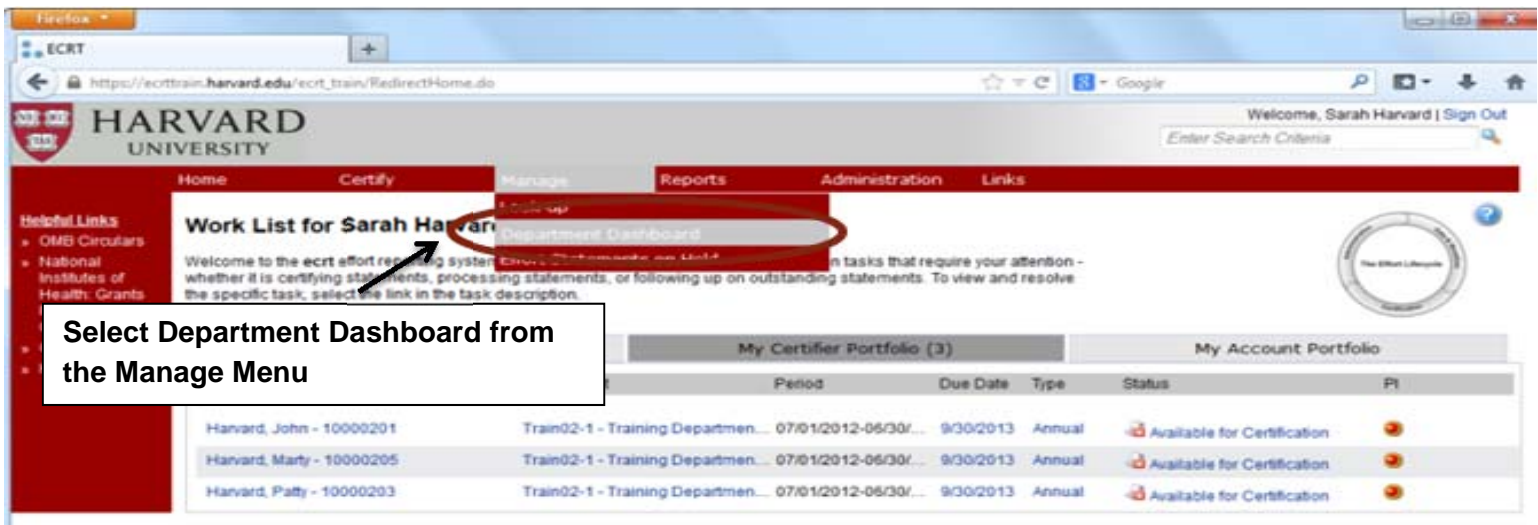


Using the Department Dashboard

The department dashboard has 4 tabs, “People”, “Project Certifications”, “Fund and Account” and “Department Information”. The department dashboard can be used to access In Progress, Available, and Historical annual effort and quarterly project statements. In addition, the department dashboard can be used by effort coordinators to perform specific functions as discussed below.

**To Access the Department Dashboard:**

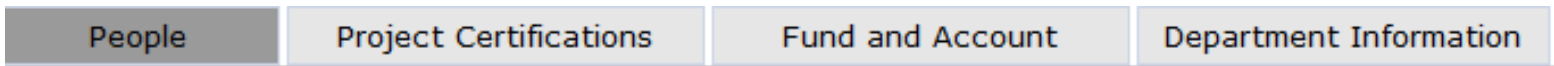
1. Navigate to the department dashboard by Clicking Manage>Department Dashboard
2. Select the appropriate department from the drop-down menu and select “Choose”
3. Navigate to the appropriate tab



**Department Dashboard for Training Department 01-1 - Train01-1**

Search for Department:




Select Department when defined to more than one and click Choose.



## The "People" Tab

The first tab on the department dashboard is the "People" tab, which lists all annual individuals assigned to the department.

Within the "People" tab you can perform various functions:

- Obtain statement status statistics for a specific period of work performed
- Access "In Progress" , "Available for Certification" , and historically "Certified"  statements
- Filter statements by Certifier Name, Employee ID, Role or Employee Type

At the top of the tab is the certification summary chart, which by default shows the statistics for all statements for the most recent period of work performed. To see statistics for a different PWP, first select Annual from the Employee Type drop-down menu and then select the desired period from the Period drop-down menu.

### Department Dashboard for Training Department 01-1 - Train01-1




Search for Department:

Select the desired PWP to see the status statistics.

People | Project Certifications | Fund and Account | Department Information

**Certification Summary Chart:** Statement Type  Annual  Supplemental Employee Type Annual Period [Select]

The default search is for base Effort statements for all certifiers in this Department, for the current period of performance

Status	Count	Annual
Available for Certification 	2	50.0%
Available for Certification, Re-Opened by Salary Adjustment 	1	25.0%
Certified 	1	25.0%


The covered individual section is where the list of all annual employees in the department will be shown and where the statements can be accessed. This section is broken down into 4 sections, (1) Sponsored, (2) Non-Sponsored, (3) Non-Department, and (4) Terminated. The sponsored individuals are those that will have an effort statement(s) to certify - Individuals listed under the Non-sponsored section will have effort statement(s), however, once the certification period opens and the status changes from 'In progress", these statements will be auto processed, meaning there is no certification required as there is no sponsored funding on the statements that requires certification.

People | Project Certifications | Fund and Account | Department Information

**Certification Summary Chart:** Statement Type  Annual  Supplemental Employee Type [Select] Period [Select]

The default search is for base Effort statements for all certifiers in this Department, for the current period of performance

Status: Annual










In Progress  1 100.0%

Filter by Name, Employee ID, Role, Employee Type

Select filter type:

- Name
- Employee ID
- Role
- Employee Type

Use to search for an apostrophe, please enter two apostrophes to return results)

Name	Grant Manager	Employee ID	Role	Statements	Action
<b>Sponsored</b>					
Harvard, John	Harvard, Simone - 10001808	10001801	PI		  
Harvard, Marty		10001805	PI		  
Harvard, Patty		10001803	PI	Harvard, John Jul 1 2012 to Jun 30 2013	  
<b>Non-Sponsored</b>					
<b>Non-Department</b>					
<b>Terminated</b>					




Scroll over the annual statement you want to access and click the appropriate link



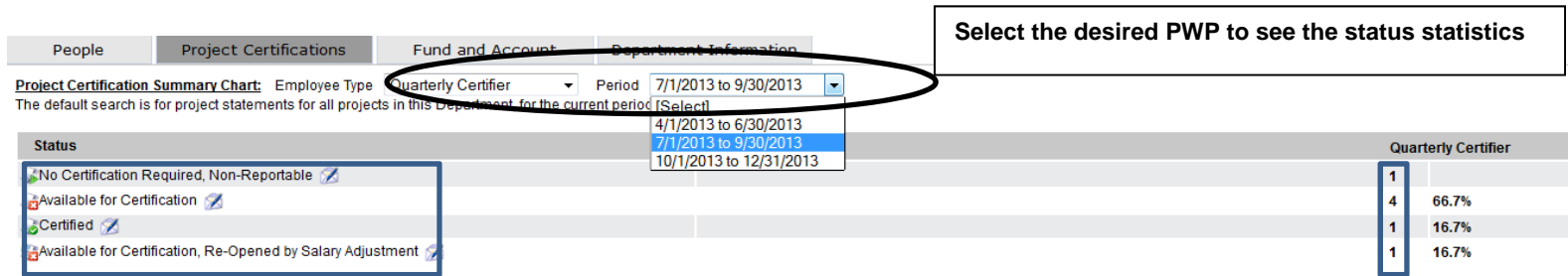
## The "Project Certification" Tab

The "Project Certification" tab lists all quarterly project statements assigned to the department.

Within the "Project Certifications" tab you can perform various functions:

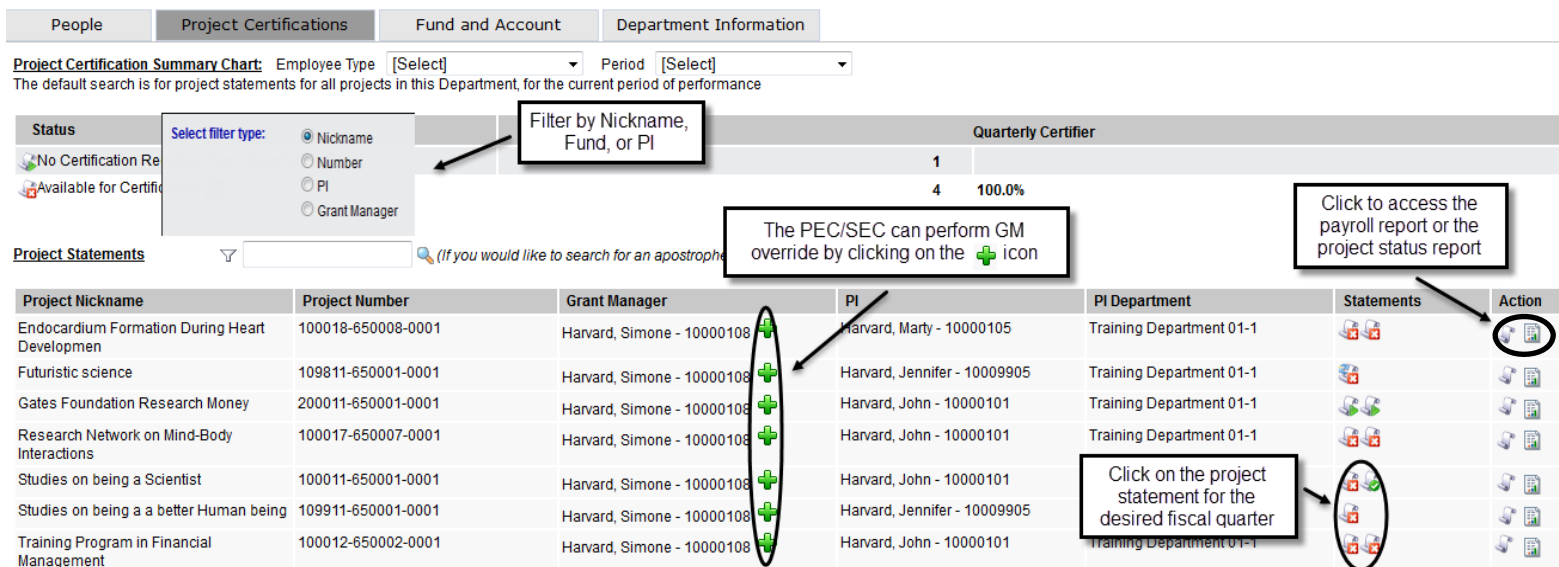
- Obtain statement status statistics for a specific period of work performed
- Access "In Progress" , "Available for Certification" , and historically "Certified"  statements
- Filter statements by Nickname, Number, PI, Grant Manager
- Perform GM overrides
- Run the Payroll report for all individuals listed on the project
- Run the Project Status Report for all project statements belonging to the PI/Certifier selected






















Similarly to the "People" tab, by default the Project certification summary chart shows the statistics for all Project statements for the most recent period of work performed. To see statistics for a different PWP, select desired period from the drop-down menu.



Status	Quarterly Certifier
No Certification Required, Non-Reportable	1
Available for Certification	4 66.7%
Certified	1 16.7%
Available for Certification, Re-Opened by Salary Adjustment	1 16.7%

The project statement section is where all the project statements for the department will be shown and where they can be accessed.



Project Nickname	Project Number	Grant Manager	PI	PI Department	Statements	Action
Endocardium Formation During Heart Developmen	100018-650008-0001	Harvard, Simone - 10000108	Harvard, Marty - 10000105	Training Department 01-1	 	
Futuristic science	109811-650001-0001	Harvard, Simone - 10000108	Harvard, Jennifer - 10009905	Training Department 01-1	 	
Gates Foundation Research Money	200011-650001-0001	Harvard, Simone - 10000108	Harvard, John - 10000101	Training Department 01-1	 	
Research Network on Mind-Body Interactions	100017-650007-0001	Harvard, Simone - 10000108	Harvard, John - 10000101	Training Department 01-1	 	
Studies on being a Scientist	100011-650001-0001	Harvard, Simone - 10000108	Harvard, John - 10000101	Training Department 01-1	 	
Studies on being a better Human being	109911-650001-0001	Harvard, Simone - 10000108	Harvard, Jennifer - 10009905	Training Department 01-1	 	
Training Program in Financial Management	100012-650002-0001	Harvard, Simone - 10000108	Harvard, John - 10000101	Training Department 01-1	 	



## The "Fund and Account" Tab

The "Fund and Account" tab lists all active and inactive accounts from GMAS that are assigned to the department – All Inactive grants will have a yellow icon next to the name. The list displays the fund and account number, the account name, the sponsor and PI of the account, and the start and end dates. All of the columns are sortable, allowing you to find all accounts related to a fund, a sponsor, or a specific PI – Selecting the header once sorts the column in an ascending order, twice sorts descending. Additionally, the list can be filtered to reduce what is displayed.

If you click on an active FUND, you will be brought to the Fund Summary Page and from there you will see all accounts (fund, activity, sub activity) under that fund. If you go back and click on the active ACCOUNT, you will be taken to the Account Summary Page – this is where the project statements live and where they need to be accessed from.

**Department Dashboard for Training Department 01-1 - Train01-1**

Search for Department:

People Fund and Account **Select filter type:**

- Name
- Number
- Sponsor
- PI

Fund Number	Account Number	Account Name	Sponsor	PI	Start Date	End Date	SPES
100016	109911-650001-0001	National Space Biomedical Research Institute Core Research Program	1693b	John Harvard	09/01/2012	12/31/2013	
	109811-650001-0001	Main 13	1693b	John Harvard	09/01/2012	12/31/2013	
	109811-650001-0001	Main 1	1693b	John Harvard	09/01/2012	12/31/2013	
100011	100011-650001-0001	Studies on being a Scientist	1693b	John Harvard	09/01/2012	12/31/2013	
100011	100011-650001-0001	Main 1	1693b	John Harvard	09/01/2012	12/31/2013	
100012	100012-650002-0001	Year 1	1693b	John Harvard	09/01/2012	12/31/2013	
100012	100012-650002-0001	Training Program in Financial Management	1693b	John Harvard	09/01/2012	12/31/2013	
100017	100017-650007-0001	Main - John Harvard	1693b	John Harvard	09/01/2012	12/31/2013	
200011	200011-650001-0001	Gates Foundation Research Money	308	John Harvard	09/01/2012	12/31/2013	
200011	200011-650001-0001	Year 1	308	John Harvard	09/01/2012	12/31/2013	
100018	100018-650008-0001	Endocardium Formation During Heart Development	1693b	Marty Harvard	09/01/2012	12/31/2013	
100018	100018-650008-0001	Main Year 3	1693b	Marty Harvard	09/01/2012	12/31/2013	
100014	100014-650004-0001	Quantitative Numbers and Math	1693b	Marty Harvard	09/01/2012	12/31/2013	
100014	100014-650004-0001	Subagreement 1	1693b	Marty Harvard	09/01/2012	12/31/2013	
100015	100015-650005-0001	Inhibition of Translation Initiation in Cancer Therapy	1693b	Patty Harvard	09/01/2012	12/31/2013	
100015	100015-650005-0001	Main 1	1693b	Patty Harvard	09/01/2012	12/31/2013	

**Fund Summary**

Fund Name: Training Program in Financial Management  
 Fund Nickname: Training Program in Financial Management  
 Fund Number: 100012  
 Fund PI: John Harvard - 10000101 (Primary Effort)  
 Coordinator: Sarah Harvard - 10000115

Exception Fund:   
 Cost Sharing Requirement:   
 Start to End Date: 09/01/2012 to 12/31/2013  
 Fund Type: Main  
 Fund Manager: Simone Harvard - 10000108  
[show more >>](#)

**Associated Project Statements**  
 Nothing found to display.

**Account Relationships**  
 One item found

Number	Name
100012-650002-0001	Year 1

**Covered Individuals associated with this Fund**  
 One item found

Certifier Name	Department
Harvard, John - 10000101	Training Department 01-1

**Account Summary**

Account Name: Year 1  
 Account Nickname: Training Program in Financial Management  
 Account Number: 100012-650002-0001  
 Fund Name: Training Program in Financial Management  
 Account PI: John Harvard - 10000101 (Primary Effort)  
 Coordinator: Sarah Harvard - 10000115

Exception Account:   
 Cost Sharing Requirement:   
 Start to End Date: 09/01/2012 to 12/31/2013  
 Account Type: Grant  
 Account Manager: Simone Harvard - 10000108  
[show more >>](#)

**Associated Project Statements**  
 2 items found, displaying all items:

Period	Project Certification Status
FY14 Q2	Available for Certification
F14 Q1	Available for Certification

**Account Relationships**  
 Nothing found to display.


**Covered Individuals associated with this Account**  
 3 items found, displaying all items:


















**Click on the Account Name to display the Account Summary Page to view project statements**



## The “Department Information” Tab

The “Department Information” tab contains information about the department’s effort coordinators (TEC’s, PEC’s, SEC’s, GM’s), including names and email addresses and which individual is the department PEC (highlighted in yellow). In addition, this tab allows several possible actions depending on the role and rights of the effort coordinator such as re-assigning the “Gold Bar” PEC and managing GM assignments.

The PEC/SEC has the ability to process GM assignments by clicking on the  icon

People	Project Certifications	Fund and Account	Department Information	
<b>Department Effort Coordinator(s)</b>				
Name	Address	Phone	Email	Action
Harvard, Sarah - 10000115			sarahharvard@test.net	    
Harvard, Simone - 10000108			simoneharvard@test.net	   
Harvard, Meredith - 10000110			meredithharvard@test.net	   
Harvard, Olga - 10000102			Olgaharvard@test.net	   

The TEC has the ability to assign and Re-assign the “Gold Bar” PEC by clicking on the yellow highlighter icon next to the appropriate individual