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Business Central Awards Dashboard

Overview

Business Central Awards Dashboard is a financial reporting tool that allows you to access your University of Winnipeg Awards online. This tool has been designed to provide you with:

- Access to your current Award balances
- Access to information about your Awards such as start and end dates, funder information, award estimates (if applicable), etc.
- The ability to export transaction history into Excel for analytical purposes

1. *How to access Business Central Awards Dashboard*

The link to the new online system will be emailed to you.

If you cannot access the dashboard, please contact Research Accounting at researchaccounting@uwinnipeg.ca.

The dashboard will show a list of all the active awards that you are currently responsible for or administer:

 Items to note:

- The FundersReferenceNo is the funders grant ID number or the Research Start Here (RSH) number.

- The fund, sector, dept and subdept information has been assigned based on the home dept of the person who has primary responsibility for the Award. Please let us know if this information is not accurate
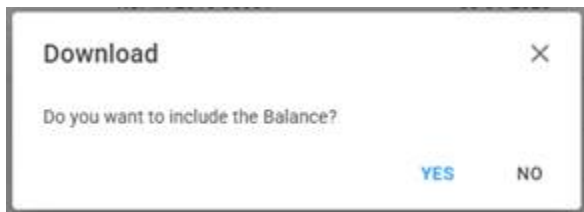
2. Viewing your Award Balances

There are two ways to view your award balance.

Method #1: To view your award balance you can download the award list by clicking on the [⬇ DOWNLOAD] button located on the top left of the screen.
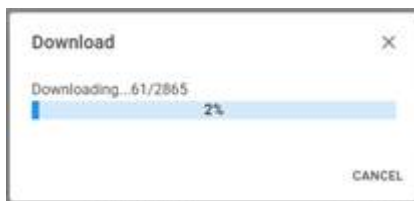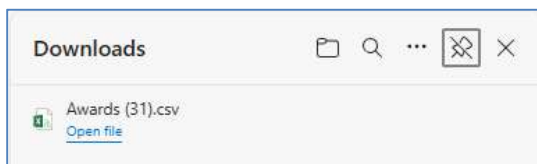

- Click on YES to include the award balance.

- A box will appear indicating the download progress.

- Once the download is complete, the file "Awards (##). csv" will be available in the Downloads folder.
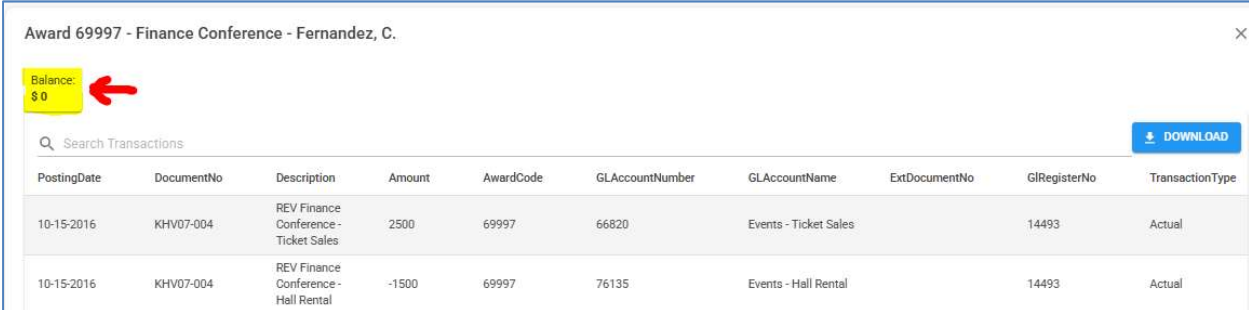
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Method #2: Click on the 3 dots ⋮ beside the award number.

- The balance can be found on the top left section.

Additional Information

- Balance field
    - A negative number means that the Award has funds remaining
    - A positive number means the Award is overspent or has not yet received all its revenue

Tip: Click on the X to go back to the award list.

3. Exporting Transaction Entries List to Excel

Business Central Awards Dashboard provides the ability to export the detailed transaction entires making up the balance to Excel. To do so, click on the 3 dots located on the left side of the award number.

- Click on the **⬇ DOWNLOAD** button.

- Once the download is complete, the file "Award Entries - xxxxx. csv" will be available in the Downloads folder.

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Items to note about the Balance:

- A negative number means that the Award has funds remaining
- A positive number means the Award is overspent or has not yet received all its revenue

- The balance is comprised of not only Actual transactions, but also Commitments and Encumbrances. This means that the cost of an item is recorded at the point of being requested, as opposed to waiting for when it is received
- By including these transactions, the balance field more accurately reflects what is remaining to be spent on the award and also helps to prevent overspending

- Definitions:
    - **Commitments** are recorded when a purchase requisition is received and recorded by the Purchasing department
    - **Encumbrances** are recorded when the purchase requisition becomes a Purchase Order. The commitment is reversed at this point and will now be reflected as an encumbrance
    - **Actuals** are recorded when the item is received and invoice is paid. The encumbrance will be reversed at this stage and the expense will be recorded as an actual expense
- Commitments and Encumbrances are ONLY recorded for items purchased through the Purchasing Department (i.e. does not apply to payroll or other charges)
- The transaction type is noted in the transaction type field as highlighted below:
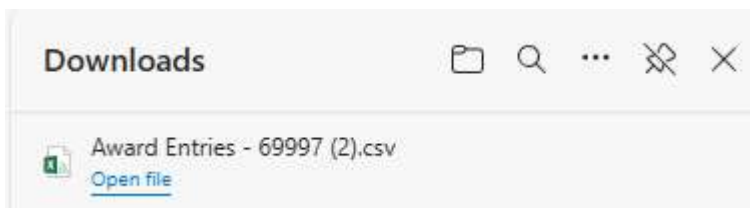

Award 69997 - Finance Conference - Fernandez, C.

Balance: $ 0

PostingDate	DocumentNo	Description	Amount	AwardCode	GLAccountNumber	GLAccountName	ExtDocumentNo	GlRegisterNo	TransactionType
10-15-2016	KHV07-004	REV Finance Conference - Ticket Sales	2500	69997	66820	Events - Ticket Sales		14493	Actual
10-15-2016	KHV07-004	REV Finance Conference - Hall Rental	-1500	69997	76135	Events - Hall Rental		14493	Actual
10-15-2016	KHV07-004	REV Finance Conference - Food Costs	-900	69997	76140	Events - Food Costs		14493	Actual
10-15-2016	KHV07-002	Finance Conference - Ticket Sales	-2500	69997	66820	Events - Ticket Sales		12217	Actual
10-15-2016	KHV07-002	Finance Conference - Hall Rental	1500	69997	76135	Events - Hall Rental		12217	Actual
10-15-2016	KHV07-002	Finance Conference - Food Costs	900	69997	76140	Events - Food Costs		12217	Actual

4. Additional Information

- Closed Awards
    - Closed awards will be removed from your Business Central Awards Dashboard Awards list. If you require any information about a closed award, please contact Research Accounting

- Missing/Incorrect Awards
    - Please contact Research Accounting if there are any Awards missing from your Awards list that you are responsible for or ones that are on your list that should not be

5. Tips and Tricks

- Maximize the screens in Business Central Awards Dashboard to make it easier to see full account names and descriptions

- You can lookup multiple Awards by manually typing either ranges or a series of individual Awards into the search field:

    - To lookup a range of Awards (i.e. consecutively numbered Awards), use two periods to separate the first and last number of the range:

    - To lookup a group of non-consecutive awards, type in the Award numbers you want separate by the pipe symbol, which is created by clicking the shift and backslash buttons at the same time:
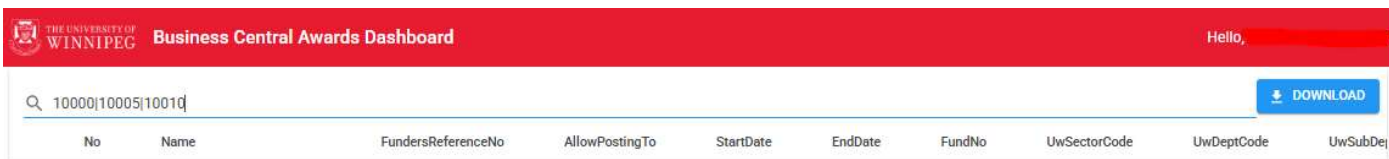
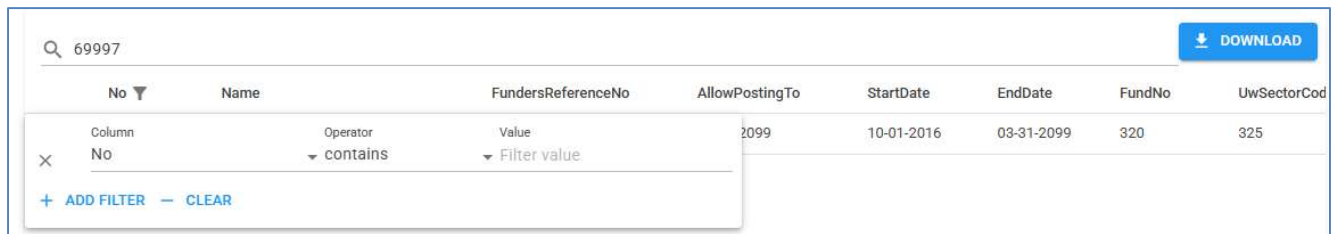# Business Central Awards Dashboard

- Filter Function

    The filter function allows you to filter based on criteria you define.
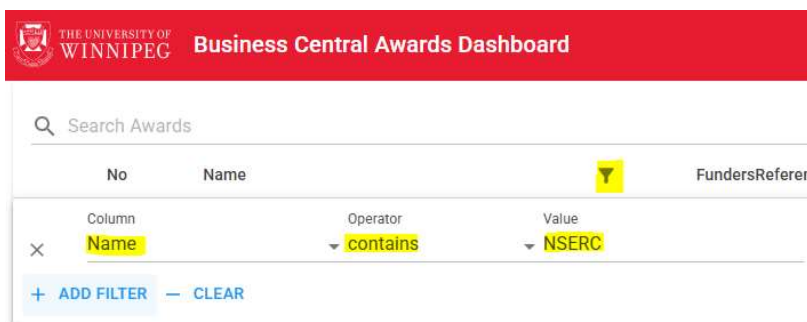
    - You can filter the Award list by clicking on the three dots beside the column name.

    A pop-up window will appear where you can enter the desired criteria.

    In the following example the Name filter is used to return all records containing "NSERC" in the award name.

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- You can filter the transaction entries list by clicking on the three dots beside column name.

A pop-up window will appear where you can enter the desired criteria.

In the following example the GLAccountName filter is used to return all records containing "food" in the GLAccountName field.

# Business Central Awards Dashboard

- You can pin the webpage to your Windows taskbar using the following instructions.

    1. Open Edge and navigate to the webpage you want to add to the Windows Taskbar.
    2. At the top right of the Edge window, click on the Ellipses icon.
    3. From the pop-up menu click on "More tools"
    4. From the cascading menu select "Pin to taskbar"

    5. An icon will be pinned to your Taskbar.

Questions?

If you have any questions or concerns about Business Central Awards Dashboard, please contact Research Accounting at:

- researchaccounting@uwinnipeg.ca

- Melannie Soukhalom
  - m.soukhalom@uwinnipeg.ca