

# Finance -- Grant Tracking Regent Summary (expected publish date Spring 2022)

|                              |  |
|------------------------------|--|
| Brief Description            | Grant tracking summaries for SMPH Deans Office and Departments. This project currently includes an annual research pivot report, provided to the department chair, extramural funding, and faculty demographic summaries.<br>Goals: Design an efficient analysis system for financial data to meet school and departmental reporting demands. Minimize & eliminate manual workflows.   |
| Data Classification          | Internal   |
| Developer                    | Ashlyn Hussey & Amy Johnson (DOM)  |
| Primary Audience             | SMPH Fiscal Affairs, Departmental Admin & Financial Roles  |
| Data Sources                 | EPM CURRENT_JOB, AADW UDDS_CODES, AADW HR_CURRENT_DEMOGRAPHICS, WISDM REGENT_SUMMARY_REPORT, WISDM PROJECTS  |
| Data Load Schedule           | Daily  |
| Definitions                  |  |
| Plans for Future Development |  |
| Additional Notes             | Multi-year awards are included in the year from which they were granted.<br><br>This was originally built by the Department of Medicine to replace a deprecated Grant Tracking PHP-based web application.<br><br>The team involved in bringing this app together included: Sheri Lawrence, Lisa Bindl, Calleen Roper, Betty Weiss, Amy Johnson, Ashlyn Hussey, Lindsay Rowe, Darlene Wood, Karla Thompson, Elizabeth Simcock |

Date Published:

Published In:

N/A

Finance:  
Admin and  
Departmental



Additional Documentation

- [Data Model](#)
  - [Data Model Constraints](#)
- [Sheet Overview - Award Summary Dashboard](#)
  - [Sheet Contents](#)
- [Sheet Overview - Award Explorer](#)
  - [Sheet Contents](#)
- [Common Use Cases & Workflows](#)
  - [Example: How much funding did a specific Department have in FYXX](#)
  - [Example: How much funding did a specific Division have in FYXX?](#)
  - [Example: Who are the top 5 researchers in a Dept/Division?](#)
  - [Example: How many awards is a Dept/Division managing?](#)

## Data Model

This app runs from HRS data copied to the SMPH data warehouse and from there, is loaded into QlikSense to use for data views. Data is re-loaded from the sources every 24 hours. The source tables are listed below:

| VIEW | SOURCE | DESCRIPTION |
|------|--------|-------------|
|------|--------|-------------|

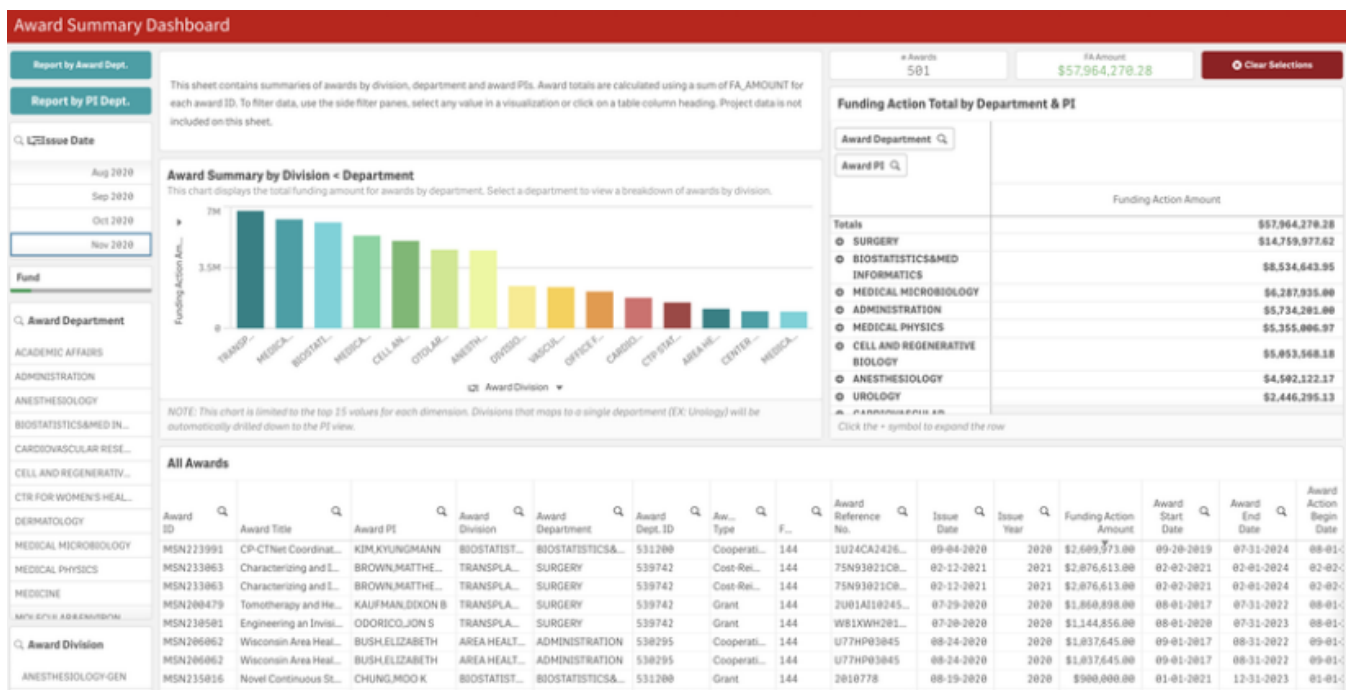
|                       |                              |   |
|-----------------------|------------------------------|---|
| Regent Summary Report | WISDM /REGENT_SUMMARY_REPORT | <p>Represents Award Funding Actions that must be reported to the Board of Regents.</p> <p><b>Constraints:</b><br/> UW-Madison Awards only.<br/> Contains awards granted 2017 or later.</p> <pre>YEAR(ISSUE_DATE) &gt;= 2017 AND YEAR(ISSUE_DATE) &lt;= Year(Today()) AND BUSINESS_UNIT = 'UWMSN'</pre>  |
| Faculty               | HR/CURRENT_JOB               | <p>Contains the row currently in effect for each active and terminated job from HRS. <i>Future jobs and future changes are NOT included.</i></p> <p>Fields include key employee fields and all job-related fields, such as Department, FTE, Employee Classification, Job Code and Description, Employee Type, Salary Admin Plan and Grade, and Compensation.</p> <p><b>Constraints:</b><br/> Only UW-Madison SMPH employee/faculty members.</p> <pre>BUSINESS_UNIT = 'UWMSN' AND wildmatch(DEPTID, 'A53*') = 1;</pre> |
| Awards                | WISDM/AWARDS.QVD             | <p>Joins to Regent Summary Report view on AWARDS_KEY. Fields include AWARD_START_DATE, AWARD_END_DATE, and AWARD_TYPE</p>   |

## Data Model Constraints

- Business unit = UWMSN (*UW-Madison awards only*)
- ISSUE\_DATE >= 2017 (*includes awards granted 2017 or later*)
- UWMSN employees *with employee department A53\*\*\*\**

## Sheet Overview - Award Summary Dashboard

This sheet contains summaries of awards by division, department and award PIs. Award totals are calculated using a sum of FA\_AMOUNT for each award ID. Project data is not included on this sheet to prevent duplication. To filter data, use the side filter panes, select any value in a visualization or click on a table column heading.



## Sheet Contents

| FEATURE                                | TYPE           | DESCRIPTION   |
|--|----------------|---|
| Award Summary by Division < Department | Bar Chart (DD) | <p>This chart displays the total funding amount for awards by department. Select a department to view a breakdown of awards by division.</p> <p>Use the down arrow next to Award Division to view funding action total by department or division only.</p> <p><i>This chart is limited to the top 15 values for each dimension.</i></p> |
| All Awards                             | Table          | <p>This table displays rows of basic award information in a spreadsheet format. Project data is not included in this visualization to prevent duplication of records.</p>   |
| FA Total by Department & PI            | Pivot table    | <p>Use this table to view FA_Amount totals by department. Expand each row using the '+' sign to view FA_Amount total broken down by PIs.</p>  |
| Report by Award Dept.                  | Button         | <p>Filters data in this sheet to show 133/144 awards issued to Dept. of Medicine department.</p> <p>FUND=133/144<br/>AWARD_DEPT_ID = 53**</p>   |
| Report by PI Dept.                     | Button         | <p>Filters data in this sheet to show 133/144 awards from PIs with (HR) appointments in medicine divisions.</p> <p>FUND=133/144<br/>PI_DEPT_ID = 53**</p>   |
| Clear Selection                        | Button         | <p>Clears all current selections applied to this sheet.</p>   |
| # of Awards                            | KPI            | <p>A count of the number of unique award IDs. Changes along with filters.</p> <p>COUNT(unique AWARD_ID)</p>   |
| FA Amount                              | KPI            | <p>A sum of FA_AMOUNT for all awards. Changes along with filters.</p> <p>SUM(FA_AMOUNT)</p>   |

|            |                  |  |
|------------|------------------|--|
| Issue Date | Filter Pane (DD) | <p>Allows for filtering awards by ISSUE_DATE from the RSR database. Formatted to be based on Fiscal Year. First select year that you wish to filter by and then (optionally) by a range of months in that fiscal year.</p> <pre>Subfield(YearName(ISSUE_DATE, 0, 7), '-', -1)</pre> <pre>MonthName(ISSUE_DATE)</pre> |
|------------|------------------|--|

## Sheet Overview - Award Explorer

This sheet displays rows of basic award information in a spreadsheet format for all divisions and PIs. Project data is not included in this visualization to prevent duplication of records.

### Sheet Contents

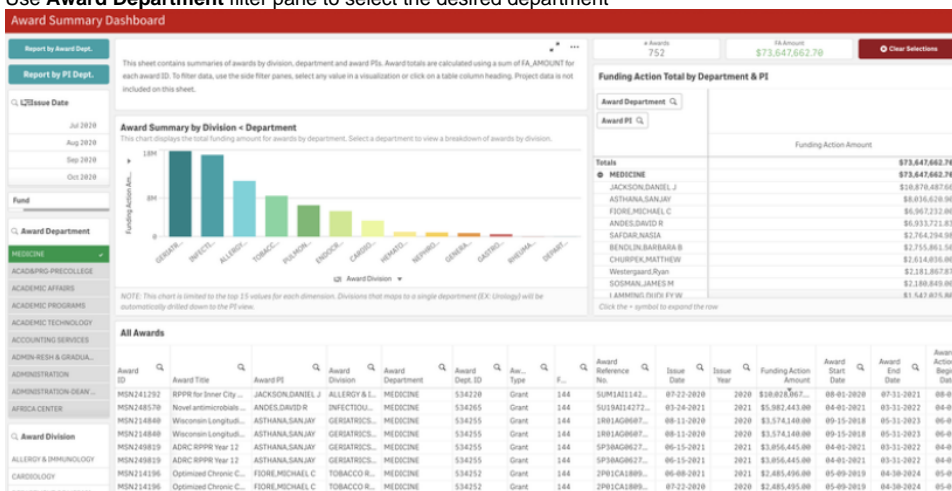
| FEATURE                           | TYPE             | DESCRIPTION  |
|-----------------------------------|------------------|--|
| All Awards                        | Table            | This table displays rows of basic award information in a spreadsheet format. Project data is not included in this visualization to prevent duplication of records.   |
| Issue Date                        | Filter Pane (DD) | <p>Allows for filtering awards by ISSUE_DATE from the RSR database. Formatted to be based on Fiscal Year. Select year that you wish to filter by and then (optionally) by a range of months in that fiscal year.</p> <pre>Subfield(YearName(ISSUE_DATE, 0, 7), '-', -1)</pre> <pre>MonthName(ISSUE_DATE)</pre>   |
| Award Action Date                 | Filter Pane (DD) | <p>Allows for filtering awards by AWARD_ACTION_BEGIN_DATE from the RSR database. Formatted to be based on Fiscal Year. Select year that you wish to filter by and then (optionally) by a range of months in that fiscal year.</p> <pre>Subfield(YearName(AWARD_ACTION_BEGIN_DATE, 0, 7), '-', -1)</pre> <pre>MonthName(AWARD_ACTION_BEGIN_DATE)</pre>  |
| Reporting Period                  | Filter Pane (DD) | <p>Allows for filtering awards by REPORTING_PERIOD_FY and REPORTING_PERIOD fields from the RSR database. Note that these fields are manually input by RSP. Select reporting period year that you wish to filter by and then (optionally) by a range of months in that fiscal year.</p> <pre>Subfield(YearName(AWARD_ACTION_BEGIN_DATE, 0, 7), '-', -1)</pre> <pre>MonthName(AWARD_ACTION_BEGIN_DATE)</pre> |
| Department < Divisions < Award PI | Filter Pane (DD) | <p>Allows for filtering awards by award department, award division and award PI. AWARD_PI is brought in from the RSR table. Award Department and Division fields are based on DEPT_LONG_NAME, UDDS_LONG_NAME fields from the UDDS database table linked to an award record in the RSR table.</p>   |
| Sponsor Type < Sponsor            | Filter Pane (DD) | <p>Allows for filtering awards by sponsor type and, optionally, further drill down the selection to individual award sponsors.</p> <pre>Award Sponsor Type = SPONSOR_TYPE_DESCRIPTION</pre> <pre>Award Sponsor = SPONSOR_NAME</pre>  |

|                 |             |  |
|-----------------|-------------|--|
| Other filters   | Filter Pane | Fund - filter by fund code. Typically 133/144<br>PI Department - filter by the HR division of a PI |
| Clear Selection | Button      | Removes all current selections from the sheet.   |

## Common Use Cases & Workflows

### Example: How much funding did a specific Department have in FYXX

1. Navigate to Award Summary Dashboard Sheet. Be sure to clear any existing selections
2. Use the **Issue Date** filter pane to select the desired fiscal year. *Optional: Select range of months.*
3. Use **Award Department** filter pane to select the desired department



### Example: How much funding did a specific Division have in FYXX?

1. Navigate to Award Summary Dashboard Sheet. Be sure to clear any existing selections
2. Use the **Issue Date** filter pane to select the desired fiscal year. *Optional: Select range of months.*
3. Use **Award Division** filter pane to select the desired division.

### Example: Who are the top 5 researchers in a Dept/Division?

1. Navigate to Award Summary Dashboard Sheet. Be sure to clear any existing selections
2. Use the **Issue Date** filter pane to select the desired fiscal year. *Optional: Select range of months.*
3. Select desired division or department from the **Award Division** or **Award Department** filter panes.
4. View the **Funding Action Total by Department & PI** pivot table. Use the (+) symbol to expand the desired department and view funding totals by PI for that department.

### Example: How many awards is a Dept/Division managing?

1. Navigate to Award Summary Dashboard Sheet. Be sure to clear any existing selections
2. Use the **Issue Date** filter pane to select the desired fiscal year. *Optional: Select range of months.*
3. In the **Award Summary by Division < Department** bar chart, toggle **Award Funding Action Amount** to **# of Awards**. This will display the number of awards currently being handled by a division. *Optionally, you can drill down the bar chart further to view # of awards by department.*