



a place of mind
THE UNIVERSITY OF BRITISH COLUMBIA

Financial Services

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Financial Services is pleased to announce the availability of the Dashboard application. The aim of the Dashboard is to deliver concise up to date financial information on the projects that you manage.

Some quick facts about the Dashboard:

- 1) Only Research and Specific Purpose PG's are currently displayed. As there are normally more restrictions from the sponsor with these types of projects, greater monitoring is required.
- 2) Only five PG's can currently be displayed on the dashboard due to space restrictions. **In order to see all of your Research and Specific Purpose PG's, please click on the hyperlink titled "Click here to review more PG's and to download to Excel".**
- 3) Only principal investigators (PI's) have access to the Dashboard as the information is of a concise nature. Administrators should have access to FMS nQuery, which gives more detailed information.

Information on viewing and using the dashboard follows.

NAVIGATING TO THE DASHBOARD

1) Go to www.msp.ubc.ca

The screenshot shows the UBC Campus-Wide Login (CWL) page. At the top, there is a navigation bar with "Campuses +", "UBC Directories +", and "UBC QuickLinks +". Below this is the UBC logo and the text "a place of mind", "THE UNIVERSITY OF BRITISH COLUMBIA", and "CAMPUS-WIDE LOGIN". The main heading is "Campus-Wide Login" with the CWL logo and the tagline "simple and secure".

The main content area contains the following text:

Please enter your UBC Campus Wide Login (CWL) account details to access Enterprise Systems Portal.

Access to this application is for UBC Faculty, Staff, Student Employees and authorized users.

ENTERPRISE SYSTEMS PORTAL

CWL Login Name:

CWL Password:

[Forgot your CWL password?](#)

What is CWL? [Find out here.](#)
Don't have a CWL account? [Create one now.](#)

Security

Please Note: If you are accessing the MSP from off-campus or from the UBC Wireless Network, you must be logged into the UBC VPN service first. Click [here](#) for VPN setup documents.

PROTECT YOUR CWL ACCOUNT!

- Watch out for sites or emails that **pretend to be legitimate** and ask for your CWL username and password.
- Please report** any suspicious requests for your CWL username and password.
- [Learn more](#) about how to protect your computer.

Getting Help

If you are having **trouble logging in**, please contact the [IT Service Centre Help Desk](#).

2) Enter your CWL ID and password

If you do not have a CWL ID, please go to the “Don’t have a CWL account?” hyperlink underneath the CWL ID and password section and follow the instructions – a CWL ID must be obtained before you can view the Dashboard. Once you have your CWL ID, send the ID only (not the password) to Edmund Gin via email at egin@finance.ubc.ca and Dashboard access will be set up a few days after.



The screenshot shows a selection screen with the following text:

Please select the service you require access to and then click on continue:

Management Systems Portal

Faculty and Staff SelfService

A red arrow points to the "Management Systems Portal" radio button.

Make sure the “Management Systems Portal” button is highlighted – then press “Continue” (please note that when you first go into the MSP it can take up to a minute for the computers to collate all of your data. Subsequent entries into the MSP will be at normal speed)

- 3) You have now navigated to the Management System Portal screen and you should see your dashboard on the left hand side. An example of what it looks like is below:

Project/Grant	P/G Description	PG End Date	SpeedChart Key	Budget Balance Available	Comments
12R13545	M. Smith INS002031	02/28/2009	JNEJ	0.00	PG is expired
12R27715	SSHRC 410-2005-2250	03/31/2008	HNXV	-1.27	Balance available is in deficit and the PG has expired
12R78034	Dean of Arts	03/31/2008	HEHS	14,182.39	PG is expired
12R78891	Hampton Rsch Fund	04/30/2009	JFGC	1,011.06	Balance available is less than 10% of the budget and the PG will expire within 90 days
12R82511	NSERC RGPIN 312328-05	03/31/2010	HMXB	3,756.49	

Please see the document below titled “Using the Dashboard” for instructions on its different features.

USING THE DASHBOARD

The aim of the Dashboard is to deliver concise financial information on the grants that you manage. Below, the different features of the dashboard are explained.

Project/Grant	P/G Description	PG End Date	SpeedChart Key	Budget Balance Available	Comments
20R43785	CIHR CRI-88362	03/31/2013	JTQN	250,000.00	
20R63142	CFRI	06/30/2013	JQFR	113,000.00	
21R05818	Genome BC	12/31/2008	HKJZ	-49,751.02	Balance available is in deficit and the PG has expired
21R06054	Pfizer Canada Inc.	12/31/2008	JCAB	-73,045.40	Balance available is in deficit and the PG has expired
21R06156	Eli Lilly Cda B4Z-CA-0017 B4Z-	12/31/2008	JKGJ	233,592.52	PG is expired

Information being displayed

The dashboard tells you:

Project/Grant – The PG number

P/G Description – Source of your funds

P/G End Date – Contractual end date of the current agreement

Speed Chart – The speed chart linked to the PG number (only one speed chart is shown even if more exist)

Budget Balance Available – Total budget less expenses and commitments.

Comments – see comment section below

Project/Grant

The PG number is hyperlinked. Clicking on it will direct you to information about the PG, such as the RTA clerk who looks after the PG and those with signing authority.

Budget Balance Available

Balances in this column are also hyperlinked. Clicking on this figure will give you more information as to how it was derived. The steps to view this information are:

1) Click the budget balance that you are interested in. You'll be directed to the summary ledger, as shown below:

PROJECT_ID -		Statement of Funding & Expenses For the Period Ended January 31, 2009	
Manager:			
Project Title:			
Speedchart:			
DeptId:			
Fund:			
Status:	Open	(R)	(C)
Project Year End Month:	Jul	Current Month	Year To Date August-January
PG End Date:	December 31, 2008		
Funding			
Unspent Amount from Prior Year (A)			\$ 500,000.00
Total Funding Available	\$	0.00	\$ 500,000.00
Expenses			
Salaries & Benefits (510000-549999 and 590000-599999)	\$	0.00	\$ 98,070.64
Supplies & other (All other expenses)	\$	3,828.71	\$ 147,259.95
Travel (610000-636999)	\$	2,506.58	\$ 21,066.89
Total Expenses	\$	6,335.29	\$ 266,397.48
Current Balance *			\$ 233,602.52
Commitments *			
Other commitments (D)			\$ 10.00
Total Commitments			\$ 10.00
Projected surplus (deficit) to Jul-2009			\$ 233,592.52 (F)


1) Current balance represents the unspent amount as at the month selected. The balance is calculated by taking expenses off of the total funding available.
2) Commitments are future expenses (Purchase order + Salary) not yet paid.

This summary ledger tells you:

- Funding - The budget balance available carried from prior year plus current year budget. **A**
- Current month expenses by category – expenses are current up to the previous business day. **B**
- Year to Date expenses by category – This is from the anniversary of the start date, up to the last business day. **C**
- Commitments – Outstanding pledged expenses from today, up to the end of the fiscal year. **D**
- Projected surplus (deficit) – Funding available less year to date expenses and commitments. **E**

2) The expenses are hyperlinked, clicking on any of them will give you the individual transactions that make up this amount. The below example shows the transactions that make up \$3,828.71 in the current month expenses section above:

Program	Journal Id	Line #	Journal Line Date	Posted Date	Source	Source Ref #	Description	Vendor	Invoice Id	UBC Reference #	Purchase Req #	Actuals
JAN-2009												
Account 641300 Couriers												
S27	0004087934	2	06-JAN-09	06-JAN-09	JVD		Couriers					-58.67
											Total for Account 641300	-58.67
Account 641400 Customs & freight												
P01	0004114630	1	05-JAN-09	09-JAN-09	JVX	310-089302	ILLUMINA -JLDZ					2,274.28
											Total for Account 641400	2,274.28
Account 641500 Printing & copying												
C03	0004081525	3	01-JAN-09	01-JAN-09	JVM		Printing & copying					353.10
											Total for Account 641500	353.10
Account 712000 Consulting fees												
S02	AP04085259	11706	01-JAN-09	02-JAN-09	APV	03881786	Procurement or supply chain tr	SODERLIND,KRISTA-JUNE	POPI-023-2008	2007002332		1,260.00
											Total for Account 712000	1,260.00
											Total	3,828.71
											Report Total	3,828.71



 Export Results to Excel

The expenses can be downloaded to Excel by clicking on the “Export to Excel” button.

Comments

A comment is displayed in this section to alert to you that:

Your balance is 10% or less of your total funding

Your total expenses are greater than your total funding (in deficit)

You are within 90 days of your PG end date

You are past your PG end date (expired)

A single PG can have date and balance issues so the comment will alert you to both problems, not just one.

As stated earlier the PG end date is determined by the grant award letter or contract. The system will alert you to those PG's that are nearing their end date so that extensions, amendments or new contracts can be arranged. **Remember that for certain PG's, payroll appointments cannot extend past the contractual end date and will be rejected if they are submitted.**


PG's in deficit that will not receive any future funding should be cleared, and if the research project is finished the PG should be closed. However, a PG cannot be closed until it is showing a zero balance.

Displaying all of your PG's


The dashboard only displays the first 5 PG's, sorted numerically. To display all of your PG's please click the "Click here to review more PGs and to download to Excel" hyperlink. Another tab will open up automatically displaying all of the PG's that you manage (please note that you cannot navigate back to the Management Systems Portal using the back button, you have to close the new window or open the older window).

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21R06156	Eli Lilly Cda B4Z-CA-0017 B4Z-	12/31/2008	JKGJ	233,592.52	PG is expired


[Click here to review more PGs and to download to Excel](#) 

[Customize](#) | [View All](#) |  First 1-15 of 15 Last

Project/Grant	P/G Description	PG End Date	SpeedChart Key	Budget Balance Available	Comments
20R43785	CIHR CRI-88362	03/31/2013	JTQN	250,000.00	
20R63142	CFRI	06/30/2013	JQFR	113,000.00	
21R05818	Genome BC	12/31/2008	HKJZ	-49,751.02	Balance available is in deficit and the PG has expired
21R06054	Pfizer Canada Inc.	12/31/2008	JCAB	-73,045.40	Balance available is in deficit and the PG has expired
21R06156	Eli Lilly Cda B4Z-CA-0017 B4Z-	12/31/2008	JKGJ	233,592.52	PG is expired
21R41495	BCRICWH	12/31/2011	EJLF	-15,888.35	Balance available is in deficit
21R42054	BC Ministry Health 2005/314	09/30/2008	HGJQ	21,941.51	PG is expired
21R42150	Various Sources	12/31/2008	HKNG	167,943.91	PG is expired
21R42205	CFRI	12/31/2008	HLYV	61,535.81	PG is expired
21R42893	Pfizer Canada Inc.	12/31/2012	JKXF	600,000.00	
21R42977	Public Health 6271-15-2007/397	03/16/2009	JNQV	123,475.00	PG is expired
21R52924	M. Smith INURA001045	09/30/2009	HDRT	1,472.98	Balance available is less than 10% of budget
21R61926	HC	03/31/2007	HAFJ	13,049.42	PG is expired
21R62489	Merck Frosst Cda Ltd	12/31/2008	HRJH	0.00	PG is expired
21S30061	Pharmaceutical Outcomes Prog	03/31/2099	DZKF	273,282.10	

This page shows you the first 20 PG's, click on "View All" to view all of them or click  to view the next batch of 20 if more PG's exist. Click on "Last" to view the last 20 PG's.

Downloading to Excel

If you would like to download the information in the Dashboard to Excel, simply click , you must temporarily or permanently allow pop-ups from this website.

Sorting the information in the Dashboard

You can sort the information in the Dashboard by clicking on any of the six column titles. The first click will arrange the information in an ascending order, the second in a descending order. Please note that sorting via the Budget Balance Available doesn't work due to system limitations.

Access to the Dashboard off-campus

If you would like to view the Dashboard off-campus then VPN access is needed.