Faculty Account Dashboard (FAD)

About:

- The FAD is an online reporting tool. It was developed to replace the paper reports that faculty once received to keep track of their financial accounts, but which are no longer available due to changes in the University's systems. The FAD provides information about all individual Faculty accounts, including a Summary Spending Overview, Expenditure Details, Transaction Details, and Commitment Details.
- The FAD is a web-based portal using Qlik Sense. It can be accessed using any type of browser on any platform. The FAD reports transaction and commitment details from UVA Integrated System. Individual accounts are maintained in a database.
- The FAD Landing Page Link: Faculty Account Dashboard

Accounts:

- Accounts are defined by a PTAO combination.
- Accounts include all account types, local, grant, endowment, gift, etc.
- Your accounts can only be viewed by you and departmental finance staff.
- Budgets – Account budgets have been pre-loaded from UVA Integrated System and can only be modified by the Department Administrator, Jeff Behrend.
  By default, Account Names are: Project Number – Project Name. Upon request, you can have your Account Names changed to something you find more convenient or easily identifiable. Just tell Jeff what names you would like, and he will make the changes.

Using FAD:

- Qlik Sense is a smart and user-friendly analytics tools that can instantly generate personalized reports and very detailed information dashboards.
- The Faculty Account Dashboard is highly customizable. Each user can customize their views, pages, etc.
- Data can be filtered, sorted and outputted to a variety formats including Excel and Adobe.
- As with any new application, you should take some time to navigate around the FAD to learn how you can quickly obtain the information that is most useful to you for reviewing your accounts.

Pages:

- The landing page is the "Spending Overview". This is a summary Budget Balance Available, showing the budget, expenditures "Actuals" and remaining balance of your accounts. The default view shows these figures before commitments. By selecting the "After Commitments" button, you can add the commitments, which will re-calculate the balance after commitments.
- Navigation Note: you may need to use vertical or horizontal slider bars to view all the information in the Tables appearing on the various pages. Those bars are only visible (as thin gray bars on the right and/or bottom of a given table) when you place your cursor within the

table of interest. If you want them to be visible all the time, turn your touch screen mode to on (see below).

- Use the filter options appearing on the far left of the page (accounts, fiscal period, expenditure type, etc.) to restrict the information provided in tables and graphs. Filters that are applied in the current view are identified in small tabs on a horizontal bar near the top of the page. Remember to close those filters (click on the x in the small tab at the top of the page) when you no longer want them to restrict the information you see in charts and tables.
- Different pages are accessed using the green tabs near the top of the page. The "Spending Tables" page provides spending data by category, expenditure type, payee and shows an expenditure table by month for each Payee.
- Commitments Tables provides the same data analysis as in the Spending Tables but applies to your "planned expenses".
- The "Transaction Details" page gives a list of all the transactions on that account and can be filtered for any time frame you want.
- The "Actual Expenditures Graph" provides a bar graph of actuals by expenditure category.
- The "Summary Page" is also a bar graph of actuals, commitments, and budget for each account.

Additional Help and Feedback:

After you have spent some time with FAD, please contact Jeff with any questions you may have on how to use it to provide you with the information you need to properly follow you accounts. Suggestions for improving the tool for the faculty are also welcome.

Spending Overview Page:

Initial landing page. An account summary showing the budget, expenses (actuals) and balance.

Multiple filters. Column headers or tabs.

You will only see your accounts.

Sliders appear when hovering over table with "Touch Screen Mode" off. If "on" is selected, sliders are always shown.

Press "After Commitments" button to see the commitments displayed in the commitments column.

Spending Tables:

Current Filters. Reminder! App will remember filters. Use x button to close filters.

Faculty Account Dashboard

Edit | Spending Tables

Person — | Project Num Name 136758 AS-PHYS Re... | Account Type FA | Expenditure Cat... Supplies & Materials

Insights

Spending Tables

LOCALLY GOVERNED

« Spending Overview | » Commitments Tables | » Transaction Details | » Expenditures Graph | » Summary | » About

Person

Account Name
Award
Project
Task
Fiscal Period
Payee

🔍 Account Type

Expenditure Category	Actuals
Totals	224,729
Supplies & Materials	224,729

Expenditure Type	Actuals
Totals	224,729
Exp Credit Supplies & Material	-6,533
Supplies, Custodial R&M	6
Supplies, Lab, Comp Gas, Demur	55
Supplies, Gas & Diesel Fuel	67
Supplies, Electrical R&M	69
Supplies, Photographic	150
Supplies, Educational	892
Supplies, Vehicle R&M	931
Supplies, Books (Non-Library)	1,071
Supplies, Lab, Comp Gas, Purch	2,120

Payee	Actuals
Totals	224,729
BANK OF AMERICA	43,995
GOV CONNECTION INC	25,920
PRAXAIR DISTRIBUTION INC	16,605
UNIVERSITY OF WISCONSIN MADISON	15,000
DUKES, E CRAIG 4722	8,767
SUPPLY ROOM COMPANIES	8,762
MCMASTER CARR	8,325
PASCO SCIENTIFIC	7,837
NEWPORT CORPORATION	5,856
CRUTCHFIELD CORP	2,350

FA	✓
Endowment	
Gift	
Grant	
Intellectual Property	
Local	

Expenditure Category
Expenditure Type

Budget Balance Available Type

Before Commitments
After Commitments

Actual Expenditures for Payees by month

Payee	Fiscal Period	Totals	Jul-19	Jun-19	May-19	Apr-19	Mar-19	Feb-19	Jan-19	Dec-18	Nov-18	Oct-18	Sep-18	Aug-18	Jul-18	Jun-18	May-18	Apr-18
SHULTZ & JAMES INC		2,185	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CRABB, DONALD G 13762		2,072	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
CDW GOVERNMENT INC		2,062	-	-	-	-	-	-	-	-	-	-	216	-	-	-	-	-
CLARUS PURE WATER SERVICES		1,944	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
QUANTUM EXPERIENCE LTD			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

On all pages you can filter by account type. For example, if you want to see your spending on grants only, use this filter.

You can filter by expenditure date.

Actual Expenditures for Payees by month

Payee	Fiscal Period	Totals	Jul-19
Fringe Benefits		18,317,581	49,6
Scholarships/Fellowship		14,427,084	-
Poon, Joseph		2,826,796	18,0

Right click to export. You can take a snapshot of the filtered data for comparison. For example, compare grant year spending by categories.

Commitments Tables:

Faculty Account Dashboard — Edit — Commitments Tables

Person

Commitments Tables

LOCALLY GOVERNED

Insights

| « Spending Overview | » Spending Tables | » Transaction Details | » Expenditures Graph | » Summary | » About |

Person

Account Name

Award

Project

Task

Fiscal Period

Payee

Account Type
- Endowment
- FA
- Gift
- Intellectual Property
- Local
- Residual SP Funds

Expenditure Category

Expenditure Type

Budget Balance Available Type

Before Commitments

After Commitments

Expenditure Category	Commitments
Totals	6,876,985
Classified Salaries	504,188
Continuous Charges	223
Contractual Services	8,239
Equipment	1,700
Faculty Salaries	5,187,825
GTA/GRA	7,700
Supplies & Materials	10,451
University Staff	1,018,483
Wages	138,177

Expenditure Type	Commitments
Totals	6,876,985
Eq Capital Mechanical	1,700
FB, Classified Staff	143,022
FB, Faculty	1,163,135
FB, Univ Staff	288,911
FB, Wage Emp	10,148
Rent, Equipment	223
Salary, Class Staff FT	266,759
Salary, Faculty, Admin FT	90,658
Salary, Faculty, T&R FT	3,934,031
Salary, T, Class Staff FT	94,498

Payee	Commitments
Totals	6,876,985
Akbar, Zulkaida	54,60
ALLOY FABRICATION, INC	1,70
Arnold, Peter	173,49
Azarm, Ali	59,07
Baessler, Stefan	67,54
Barria, Patrizia	30,81
Behrend, Jeff Allen	107,58
Beverage, Michael P	102,68
Bloomfield, Louis A	190,51
Pyshkov, Maksim Alexandrovich	90,60

Committed Expenditures for Payees by date

Payee · [Expenditure Ite...]

Payee	Totals	7/1/2016	9/1/2016	6/23/2017	10/25/2017	11/20/2017	1/16/2018	1/18/2018	4/12/2018	5/4/2018	5/17/2018	7/16/2018	7/24/2018	8/10/2018
Cates, Gordon D JR	275,717	-	-	-	-	-	-	-	-	-	-	-	-	-
Poon, Joseph	270,723	-	-	-	-	-	-	-	-	-	-	-	-	-
Jones, Robert R Jr	242,332	-	-	-	-	-	-	-	-	-	-	-	-	-
Louca, Despo A (Despina)	221,450	-	-	-	-	-	-	-	-	-	-	-	-	-
Cox, Bradley B (Brad)	216,036	-	-	-	-	-	-	-	-	-	-	-	-	-
Lee, Seung-Hun	209,334	-	-	-	-	-	-	-	-	-	-	-	-	-
Bloomfield, Louis A	190,514	-	-	-	-	-	-	-	-	-	-	-	-	-

Must use "after commitments" to bring data in.

Additional pages with graphical representation of data.