GrantSolutions℠
PARTNERS IN INNOVATION

inSight Business Intelligence

Catalog of Standard Dashboards

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InSight Description

The purpose of inSight Business Intelligence (BI) is to enable GrantSolutions Partners to take large quantities of data generated from the grants lifecycle and present it in a meaningful and actionable way. Launched in January 2018, inSight leverages the power of Tableau to provide users with interactive visualizations on a holistic and as-needed basis that display a detailed view of program performance.

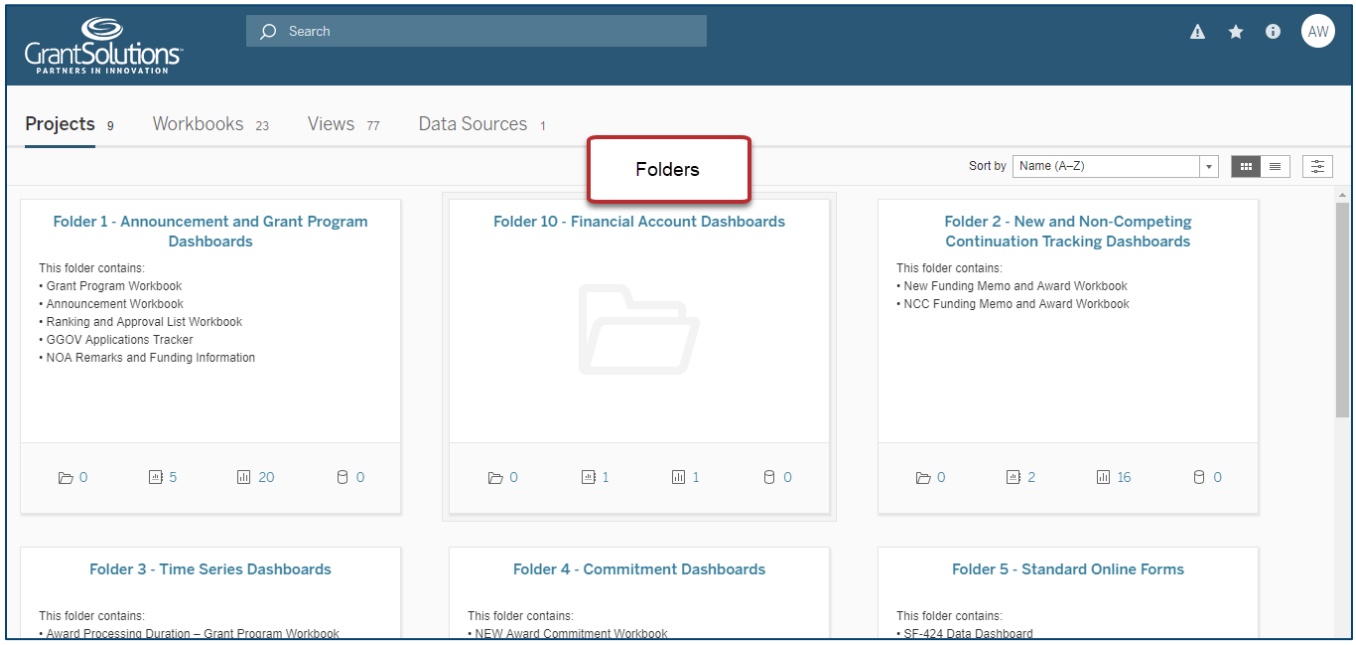
inSight:

- Allows users to manipulate a wide array of options to choose the necessary data by clicking and filtering instead of having a set number of rows and columns.
- Delivers many different types of visual representations of data through interactive maps and charts that are readily available to share with audiences inside and outside of the program.
- **Data for BI dashboards get refreshed every hour**. If a change is made in GrantSolutions, it will reflect in inSight charts and tables during the next refresh.
- Enables dashboards to be accessed by the public (no login required) by allowing users to post information in a public forum (website).

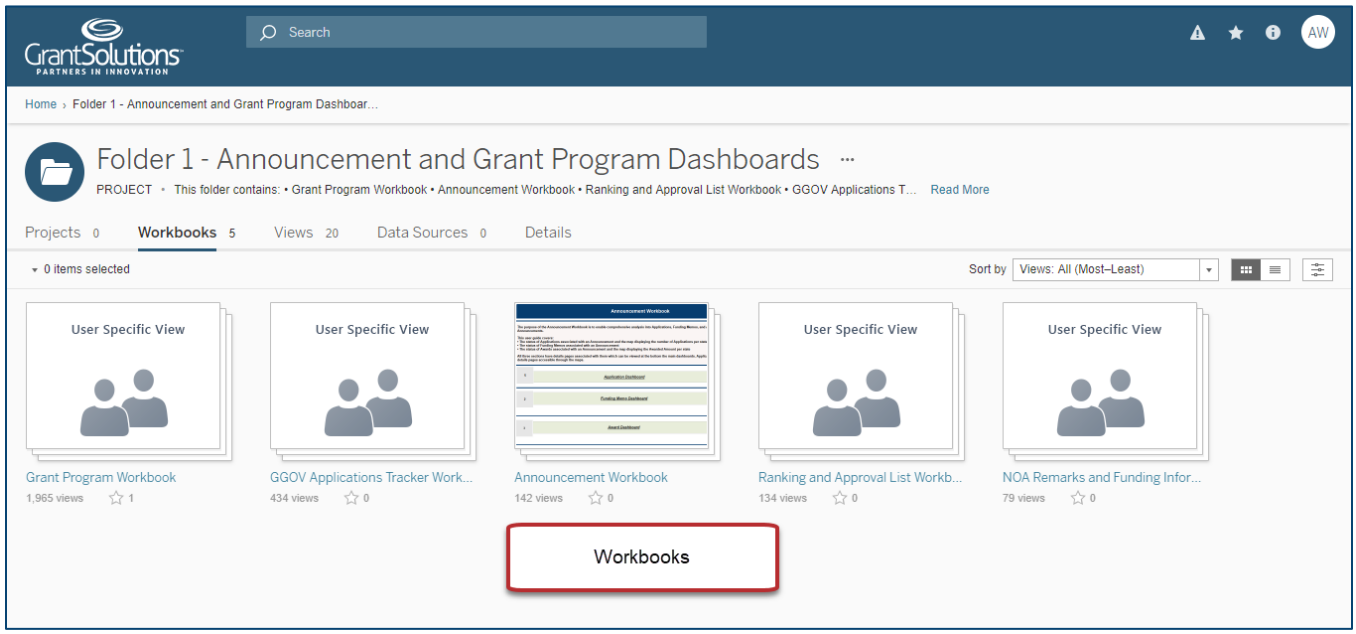
If you have further questions about the dashboards, please feel free to view our FAQs and videos.

inSight Terminology

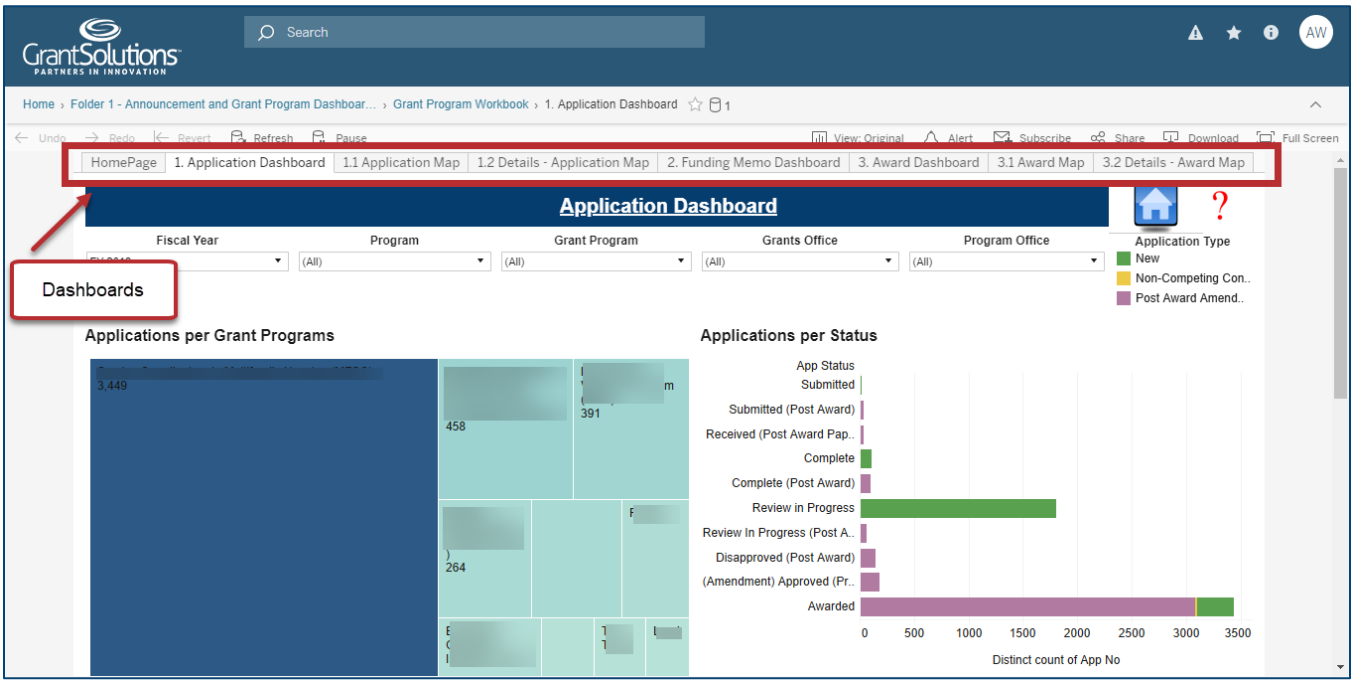
Folder: A collection of Workbooks arranged by topic.



Workbook: A group of visualizations that consolidate individual pieces of information in a dashboard.



Dashboard: Tabs within a workbook. Dashboards may contain charts, maps, key performance indicators (KPI), and data tables.



Standard inSight Dashboards and Descriptions

This document lists the names of standard dashboards available to all Partners. Additionally, it includes the Folder, Workbook, and location of each dashboard and a description of the Workbooks.

FOLDER 1 – ANNOUNCEMENT AND GRANT PROGRAM DASHBOARDS

Grant Program Workbook

Path: *Home › Folder 1 - Announcement and Grant Program Dashboards › Grant Program Workbook*

The Grant Program Workbook provides a comprehensive analysis of Applications, Funding Memos, and Awards associated with Grant Programs.

The Grant Program Workbook contains the following dashboards:

- Home Page
- 1. Application Dashboard
- 1.1 Application Map
- 1.2 Details – Application Map
- 2. Funding Memo Dashboard
- 3. Award Dashboard
- 3.1 Award Map
- 3.2 Details – Award Map

GGOV Applications Tracker Workbook

Path: *Home › Folder 1 - Announcement and Grant Program Dashboards › GGOV Applications Tracker Workbook*

The GGOV Applications Tracker Workbook provides the status of all applications that were received from Grants.gov, including applications waiting to be accepted in GrantSolutions.

The GGOV Application Track Workbook contains the following dashboards:

- Grants.gov Application Tracker
- Application Details

Announcement Workbook

Path: *Home › Folder 1 -Announcement and Grant Program Dashboards › Announcement Workbook*

The Announcement Workbook enables a comprehensive analysis of Applications, Funding Memos, and Awards associated with Announcements.

The Application Workbook contains the following dashboards:

- Home Page
- 1. Application Dashboard
- 1.1 Map – Application Map
- 1.2 Details – Application Map
- 2. Funding Memo Dashboard
- 3. Award Dashboard
- 3.1 Map – Award Map
- 3.2 Details – Award Map

Active Announcements Workbook

Home › Folder 1 - Announcement and Grant Program Dashboards › Active Announcements Workbook

Active announcements provide all active Announcements based on the Program and Grant Program selection

Active announcements Workbook contain the following dashboards:

- Active announcements

Ranking and Approval List Workbook

Path: *Home › Folder 1 - Announcement and Grant Program Dashboards › Ranking and Approval List Workbook*

The Ranking and Approval List Workbook provides a list of applications sorted by Application Decision status.

The Ranking and Approval List Workbook contains the following dashboards:

- Application Decision Dashboard

NOA Remarks and Funding Information Workbook

Path: *Home › Announcement and Grant Program Dashboards › NOA Remarks and Funding Information Workbook*

The NOA Remarks and Funding Information Workbook list remarks and funding information from the NOA.

The NOA Remarks and Funding Information Workbook contains the following dashboards:

- NOA Remarks and Funding Information

FOLDER 2 – NEW AND NON-COMPETING CONTINUATION TRACKING DASHBOARDS

NCC Workbook

Path: *Home › Folder 2 - New and Non-Competing Continuation Tracking Dashboard › NCC Workbook*

The NCC Workbook enables comprehensive analysis and comparison between Non-Competing Continuation (NCC) Funding Memos that are approved and NCC Awards that are issued during different fiscal years. Additionally, it breaks down fiscal years into months to compare pending NCC Awards.

The NCC Workbook contains the following dashboards:

- Non- Competing Continuation (NCC) Award Dashboard
- NCC FY Comparison DB
- NCC Funding Memos Approvals and Awards Issued for FY 2018 Breakdown
- Details for Pending NCC Awards for current Fiscal Year

New Workbook

Path: *Home › Folder 2 - New and Non-Competing Continuation Tracking Dashboard› New Workbook*

The purpose of the New Workbook is to enable comprehensive analysis and comparison between New approved Funding Memos and New Awards issued during different fiscal years. Additionally, it breaks down fiscal years into months to compare pending New Awards.

The New Workbook contains the following dashboards:

- New Workbook
- 1. New Comparison Award Dashboard
- 1.1 Details – New Award Monthly Breakdown
- 2. New Award Monthly Breakdown Comparison Dashboard
- 2.1 Details - New Awards Breakdown
- 3. New Award Amount Comparison Dashboard

New and NCC Award Tracking

Path: *Home › Folder 2 - New and Non-Competing Continuation Tracking Dashboard› New and NCC Award tracking*

This workbook displays pending tasks for New and NCC Award. It contains the following dashboards:

- New and NCC Award Tracking
- Details
- Help Text

NCC Fast Track Dashboard

Path: *Home Folder 2 - New and Non-Competing Continuation Tracking Dashboard › NCC Fast Track Dashboard*

This workbook tracks the status of awards in the Fast Track workflow. It contains the following dashboards:

- NCC Fast Track

FOLDER 3 – TIME SERIES DASHBOARDS

Award Processing Duration – Grant Program Workbook

Path: *Home › Folder 3 - Time Series Dashboards › Award Processing Duration - Grant Program Workbook*

The Award Processing Duration – Grant Program Workbook enables analysis into completed and pending Awards for specific Grant Programs.

The Award Processing Duration – Grant Program Workbook contains the following dashboards:

- Award Processing Duration- Grant Program
- Completed
- Pending
- Details
- Pending Details

Funding Memo Processing Duration – Grant Program Workbook

Path: *Home › Folder 3 - Time Series Dashboards › Funding Memo Processing Duration - Grant Program Workbook*

The Funding Memo Processing Duration – Grant Program Workbook enables analysis into completed and pending Funding Memos for specific Grant Programs.

The Funding Memo Processing Duration – Grant Program Workbook contains the following dashboards:

- Funding Memo Processing Duration – Grant Program
- Completed
- Pending
- Details – Funding Memo
- Pending Details – Funding Memo

FOLDER 4 – COMMITMENT DASHBOARDS

NEW Award Commitment Workbook

Path: *Home › Folder 4 - Commitment › NEW Award Commitment Workbook*

The NEW Award Commitment Workbook provides Obligated vs Outstanding Commitments and their respective application details and Commitment actions by dollar versus status.

The NEW Award Commitment Workbook contains the following dashboards:

- Home Page
- 1.Outstanding Commitments Tracker
- 2. Commitment by Status
- 2.1 Commitment Details

Open Commitments Workbook

Path: *Home › Folder 4 - Commitment › Open Commitments Workbook*

The Open Commitments Workbook provides a list of all the Commitment that are not reconciled. Use the drop-down from Fiscal year, Program and Grant Program to narrow down the search results.

The Open Commitments Workbook contains the following dashboards:

- Open Commitments Report

FOLDER 5 – STANDARD ONLINE FORMS

SF-424 Data Report-Previous FY

Path: *Home › Folder 5 - Standard Online Forms › SF-424 Data Report-Previous FY*

The SF-424 Data Report provides SF-424 Data for all Grant Programs and Announcements for the Previous Fiscal Year. The SF-424 Workbook contains the following dashboard:

- SF-424 Data Report

SF-424A Report

Path: *Home › Folder 5 - Standard Online Forms › SF-424A Report*

The SF-424A Report provides SF-424A Data for all Grant Programs and Announcements for the 5 most recent Fiscal Years. The SF-424A Workbook contains the following dashboard:

- SF-424A Report

SF-424 Data Report-Current FY

Path: *Home › Folder 5 - Standard Online Forms › SF-424 Data Report-Current FY*

The SF-424 Data Report provides SF-424 Data for all Grant Programs and Announcements for the Current Fiscal Year. The SF-424 Workbook contains the following dashboard:

- SF-424 Data Report
- SF-424 Data Submitted in the last 24 hours

Note: The SF-424 dashboard is the only dashboard that gets updated nightly and not hourly. Since GMM process more than hundred thousand applications a year, this dashboard is very data heavy and takes a long time to update, that is the main reason for the data refresh is set to update every night.

UE Grant Messages Workbook

Path: *Home › Folder 5 - Standard Online Forms › UE Grant Messages Workbook*

An evolution of the Grant Notes Workbook, the UE Grant Messages Workbook displays all types of grant messages created for grants as well as reply threads to the messages.

The UE Grant Messages Workbook contains the following dashboard:

- UE Grant Messages Dashboard

Intake Review Workbook

Path: *Home › Folder 5 - Standard Online Forms › Intake Review Workbook*

Intake Review Workbook displays all Intake Review Details for all applications.

The Intake Review Workbook contains the following dashboard:

- Intake Review Report

Business Review Workbook

Path: *Home › Folder 5 - Standard Online Forms › Business Review Workbook*

Business Review Workbook displays all Business Review Details for all applications.

The Business Review Workbook contains the following dashboard:

- Business Review Report

FFR Submission Status Report

Path: *Home › Folder 5 - Standard Online Forms › FFR Submission Status Report*

FFR Submission Status Report provides details of FFR submitted and their current state from new Grantor Experience screen. The FFR Submission Status Workbook contains the following dashboard:

- FFR Submission Status Report Dashboard

PPR Submission Status Dashboard

Path: *Home › Folder 5 - Standard Online Forms › PPR Submission Status Dashboard*

PPR Status Report provides status details on PPR forms submitted by users. The PPR Submission Status Dashboard contains the following dashboard:

- PPR Submission Status Dashboard

OLDC Status Dashboard

Path: *Home › Folder 5 - Standard Online Forms › OLDC Status Dashboard*

OLDC Status Dashboard provides status details on all OLDC forms submitted by users. This report contains the following dashboard:

- OLDC Status Dashboard

FOLDER 6 – PROGRAM SUMMARY DASHBOARDS

Active Discretionary Grants Workbook

Path: *Home › Folder 6 - Program Summary Dashboards › Active Discretionary Grants Workbook*

The Active Discretionary Grants Workbook provides details of Active Discretionary grants for all Grant Programs.

The Active Discretionary Grants Workbook contains the following dashboards:

- All Active Discretionary Grants Information
- Active Grants Map
- All Active Discretionary Grants Details

Active GMM Mandatory Awards

Path: *Home › Folder 6 - Program Summary Dashboards › Active GMM Mandatory Awards*

Active Mandatory Awards displays all Active Mandatory Award Numbers in GMM. This report contains the following dashboards:

- Active Mandatory Awards

Fiscal Year Summary and Detail Report Workbook

Path: *Home › Folder 6 - Program Summary Dashboards › Fiscal Year Summary and Detail Report Workbook*

Fiscal Year Summary and Detail Report Workbook provides the award actions and dollar amount for a selected fiscal year by Program and Grant Program.

The Fiscal Year Summary and Detail Report Workbook contains the following dashboards:

- Summary and Detail Report by FY
- Fiscal Year Summary and Detail Report
- Fiscal Year Summary by Month
- Deobligation Detail
- # Award Actions
- Funded Actions and Dollars

SAM.gov Workbook

Path: *Home › Folder 6 - Program Summary Dashboards › SAM.gov Workbook*

The SAM.gov Workbook provides Active Grants for the selected Program.

The SAM.gov Workbook contains the following dashboard:

- System for Award Management (SAM.gov) Report

Note: The information in this report is received from SAM.gov. Since it is coming from SAM.GOV the update is based on when we receive it from SAM.GOV. Usually, the data we receive is a day old, and during federal holidays the data could be as old as 2 days.

FOLDER 7 - INFRASTRUCTURE, ASSIGNMENT, AND CONTACT INFORMATION DASHBOARDS

Grant & Application Workload Assignments Workbook

Path: *Home › Folder 7 - Infrastructure, Assignment, and Contact Information Dashboards > Grant & Application Workload Assignments Workbook*

The purpose of this workbook is to detail project assignments and roles.

The Grant & Application Workload Assignments Workbook contains the following dashboards:

- Grant Workload Assignments with Role and Username
- Details of Grant Workload Assignments
- App Workload Assignments with Role and User Name
- Details of App Workload Assignments

GrantSolutions Infrastructure Workbook

Path: *Home › Folder 7 - Infrastructure, Assignment, and Contact Information Dashboards > GrantSolutions Infrastructure Workbook*

The purpose of this workbook is to provide the infrastructure information for the selected Program in Grants Management Module.

The GrantSolutions Infrastructure Workbook contains the following dashboards:

- Program Infrastructure Setup

Grantee Contact Information Workbook

Path: *Home › Folder 7 - Infrastructure, Assignment, and Contact Information Dashboards > Grantee Contact Information Workbook*

The purpose of this workbook is to provide contact information of Grant Recipients who are assigned as the Primary Grantee for the grant.

The GrantSolutions Infrastructure Workbook contains the following dashboards:

- Grantee Contact Information Dashboard
- Active Grantee Contact Information Dashboard

Grantor Roles in GMM

Path: *Home › Folder 7 - Infrastructure, Assignment, and Contact Information Dashboards > Grantee Contact Information Workbook*

The purpose of this workbook is to provide a list of all the Grantors assigned to the selected Agency, Program, or Grant Program.

The GrantSolutions Infrastructure Workbook contains the following dashboards:

- Grantor Roles in GMM

FOLDER 8 – AWARD AND AMENDMENT DASHBOARDS

Accounting Rejection Report Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Accounting Rejection Report Workbook*

The purpose of this workbook is to provide all Awards that were rejected in the Accounting stage.

The Accounting Rejection Report Workbook contains the following dashboard:

- Account Rejection Dashboard

Application Report by Fiscal Year and Grant program Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Application Report by Fiscal Year and Grant Program*

Application Report by Fiscal Year and Grant Program provide details of all the pending Applications (except Post-Award Amendments) for the Program or Grant Program selected.

Application Report by Fiscal Year and Grant Program contains the following dashboard:

- *Application Report by Fiscal Year and Grant Program*

Pending Amendment Report by Fiscal Year and Grant Program Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Pending Amendment Report by Fiscal Year and Grant Program Workbook*

The purpose of this workbook is to provide details of all the pending Amendments for the Program and Grant Program selected.

The Pending Amendment Report by Fiscal Year and Grant Program Workbook contains the following dashboards:

- Amendment Report by Fiscal Year and Grant Program Dashboard

Award Actions Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Award Actions Workbook*

This workbook allows users to filter Awards that have been through a certain Award action. This workbook also allows users to see the Primary Assigned Grantors for the Awards that have the specific Action selected.

The Award Actions Workbook contains the following dashboard:

- Award Actions Dashboard

Award Details Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Award Details Workbook*

This workbook compares the Total Balance (money remaining) and the total Awarded Amount (money given out) associated with a specific Financial Account. This workbook also displays detailed Financial Account Transactions.

The Award Details Workbook contains the following dashboards:

- Award Details Dashboard

Awards Issued Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Awards Issued Workbook*

This dashboard displays the awards that have been issued for a specific timeframe.

The Awards Issued Workbook contains the following dashboard:

- Awards Issued Dashboard

Award Total by Fiscal Year Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Award Total by Fiscal Year Workbook*

This dashboard displays the Award amount for each selected Program or Grant Program.

Award Total by Fiscal Year Workbook contains the following dashboard:

- Award Total by Fiscal Year

CLO Report Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › CLO Report Workbook*

This workbook displays every New and Competing Continuation Award for the selected Fiscal Year. This workbook also displays Non-Competing Continuation, Post Award Amendment, and Directed Supplement Awards that were awarded more than $1 million.

The CLO Report Workbook contains the following dashboards:

- CLO Report Dashboard

Grant Transaction Details Workbook

Path: *Home › Folder 8 - Award and Amendment Dashboards › Grant Transaction Details Workbook*

This Dashboard allows users to see the entire transaction history for a grant, including $0 and de-obligation transactions.

The Grant Transaction Details Workbook contains the following dashboard:

- Grant Transaction Details

FOLDER 9 – CLOSEOUT DASHBOARDS

Grant Closeout Dashboard

Path: *Home › Folder 9 – Closeout Dashboards > Grant Closeout Dashboard*

Grant Closeout Dashboard shows list of expired grants that are used by the program and grants office to close out a grant project when it has ended. Expired grants can be tracked before 90 days - after a year of project end date.

The Grant Closeout Dashboard contains the following dashboard:

- Grant Closeout Dashboard

Note- This dashboard is not connected to PMS data. This dashboard is based on data in GMM. This dashboard only tracks Grants Closeout / Project Period Closeout. This dashboard does not cover, Budget period and Document number closeout.

FOLDER 10 – FINANCIAL ACCOUNT DASHBOARDS

Financial Account Balance Workbook

Path: *Home › Folder 10 – Financial Account Dashboards > Financial Account Balance Workbook*

The purpose of this dashboard is to display the history of transactions for each financial account.

The Financial Account Balance Workbook contains the following dashboard:

- Financial Account Balance Dashboard

CAN Activity Report – UFMS Partners Only

Path: *Home › Folder 10 – Financial Account Dashboards > CAN Activity Report – UFMS Partners Only*

The purpose of this dashboard is to display the history of transactions for each selected CAN account.
The CAN Activity Report contains the following dashboard:

- CAN Activity Report
- CAN Details