Data Miner Dashboards
EBO Grants EBSR

Purpose
- This dashboard enables users to view budgets, expenditures, encumbrances, and available balances for a grant.

Best Practices
- This dashboard contains four required filters. Three are noted by *. You must additionally enter an **Award Number** and/or a **Project Number.**
- Clicking **Daily Report** will provide details based on the most recent activity.
- Clicking **Monthly Report** will provide details as of the end of the month chosen from the list.
- Do not click the **Monthly Report** radio button and the current month in the **Period Name** field.
- If the number of records retrieved does not fit onto one page, you will need to click the double-facing blue arrow at the bottom of the records to retrieve all rows and see the available balance.
- For more information on what has changed from the Data Haven Grants EBSR, view the **Grants EBSR Changes** document on the Data Miner Training page.

Initial Filters

Required Initial Filter:
- Run Analysis
- Report Type – Daily or Monthly
- Period Name

Other Initial Filters:
- Award Number
- Project Number

Sample Analysis 1
What was the available balance for award 1004306R at the end of September 2013?

1 – Click the **Monthly Report** radio button.
2 – In the **Award Number** filter, enter *1004306R*.
3 – Click the drop-down arrow for the **Period Name** and choose **SEP-13**.
4 – Select **Yes** beside **Run Analysis**, and click **Apply**.
5 – View the results.

Sample Analysis 2
How can I see details of expenditures for project 10016242 for this month?

1 – Click the **Daily Report** radio button.
2 – In the **Project Number** filter, enter *10016242*.
3 – Click the drop-down arrow for the **Period Name** and choose the current month.
4 – Select **Yes** beside **Run Analysis**, and click **Apply**.
5 – Click the yellow **Project/Task Drilldown** button and then the green **Project/Task Drilldown** gear button to see details.
6 – View the results.

Common Tools

Clear Customizations – Didn't get what you wanted? Clear any customizations in the Page Options menu to try another set of filters.

Save/Apply Customizations – Click the **Page Options** menu to save or apply customizations.

Export to Excel – Click **Export** to export all data in the current customization and edit in Excel any way you want. Data excluded via a customization will not be exported.

Print – Click **Print** to Print your customized analysis from PDF or HTML web page outputs.

	Grants EBSR	
	Column	**Definition**
	Award Full Name	The full name of the award.
*	Award Number	The unique number that identifies the award.
	Award Organization Name	The award owning organization.
	Current Budget	The current budget for the award.
	Current Month Expenditures	The current month expenditures for an award.
	Encumbrances	Amount of pay obligated to pay in the future on expenditures.
	End Date	The end date for expenditures.
	Expenditure Category	The expenditure category that classifies the expenditure type.
	Expenditures to Date	The current expenditures for an award to date.
	Funding Source Award Number	The award number of the customer funding the award.
*	Period Name	The name identifies the period. Typically shown as a month and year (JAN-12).
	Project Name	The name that identifies the period.
*	Project Number	The unique number that identifies the sponsored project.
*	Report Type	The classification of the report type. Choose Daily Report or Monthly Report.
	Sponsoring Agency Name	The name of the sponsoring agency.
	Start Date	The start date of expenditures.
	Task Name	The name of the task.
	Task Number	The number associated with the task.
	Unobligated Balance	The portion of budget for the award that has not yet been obligated.

*Denotes a filter