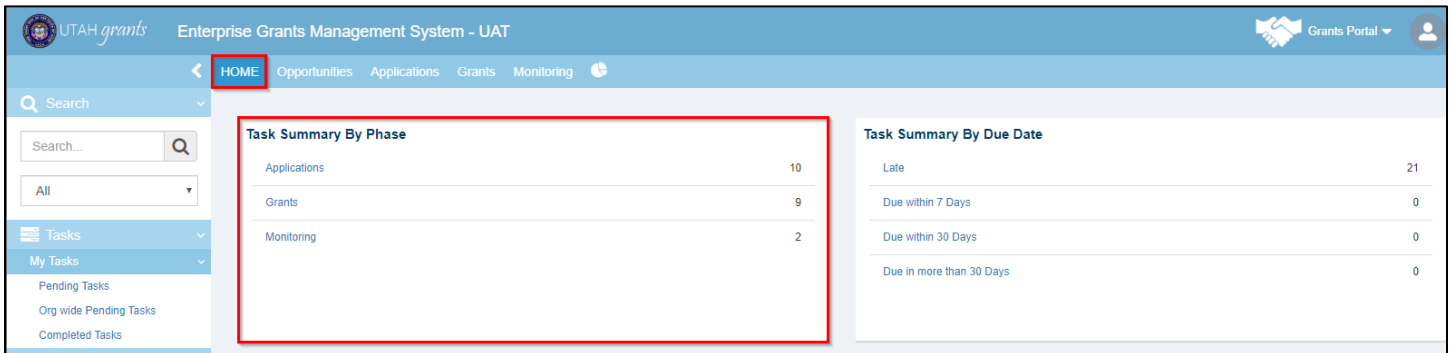


# Dashboards

Four new dashboards and four new tables are available to subrecipient grant users.

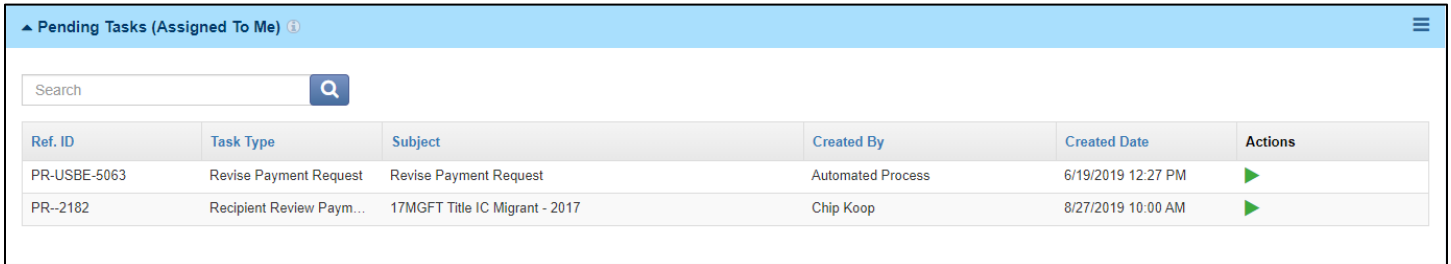
## 1. Task Summary by Phase

- On the Home Screen, a list of all tasks due for the user is listed by phase.
- Click on the hyperlink title for a shortcut to the task list for that phase.
- With this dashboard, it is no longer necessary to click the heading phase, then pending tasks to locate all pending tasks for the user.



| Phase        | Count |
|--------------|-------|
| Applications | 10    |
| Grants       | 9     |
| Monitoring   | 2     |

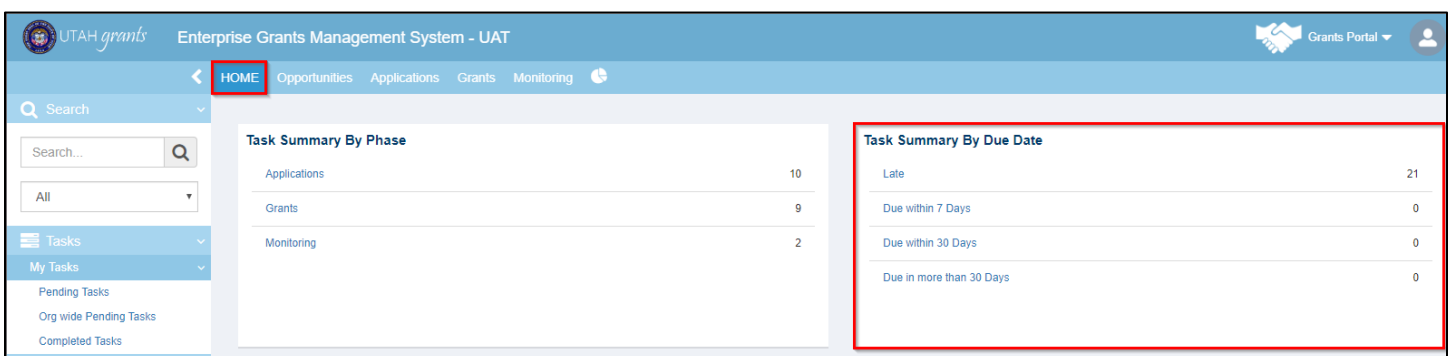
- For Example, clicking on the Monitoring phase within this dashboard will show a list of all monitoring pending tasks (including pending payment requests).



| Ref. ID      | Task Type                | Subject                        | Created By        | Created Date       | Actions           |
|--------------|--------------------------|--------------------------------|-------------------|--------------------|-------------------|
| PR-USBE-5063 | Revise Payment Request   | Revise Payment Request         | Automated Process | 6/19/2019 12:27 PM | <a href="#">▶</a> |
| PR-2182      | Recipient Review Paym... | 17MGFT Title IC Migrant - 2017 | Chip Koop         | 8/27/2019 10:00 AM | <a href="#">▶</a> |

## 2. Task Summary by Due Date

- On the Home Screen, a list of all tasks is listed by due date.
- Click on the hyperlink title for a shortcut to the task list for all tasks that are pending for the selected period.
- With this dashboard, users can monitor tasks that have been pending approval for a given period.
- Please note: once a task is generated, it is automatically due in 7 days. This is not the same as an application deadline.



| Due Date Category        | Count |
|--------------------------|-------|
| Late                     | 21    |
| Due within 7 Days        | 0     |
| Due within 30 Days       | 0     |
| Due in more than 30 Days | 0     |

### 3. Organization-Wide Pending Tasks

- On the Home Screen, a link to the report of all pending tasks for the User's organization is listed under the Task Menu (on the left task pane)

The screenshot shows the 'Enterprise Grants Management System - UAT' interface. The left sidebar contains a 'Task Menu' with options like 'Tasks', 'My Tasks', 'Pending Tasks', 'Org wide Pending Tasks' (highlighted), 'Completed Tasks', 'Activities', 'My Organization/Profile', and 'Useful Links'. The main content area has two sections: 'Pending Tasks (Assigned To Me)' and 'Pending Tasks (Assigned By Me)'. Both sections have a search bar and a table with columns: Ref. ID, Task Type, Subject, Created By, and Created Date. Both sections currently show 'No records found'.

- Use the page navigation toolbar to view up to 100 records and to move between pages
- Use the User Name search to search pending tasks by a specific user.
- Please Note: Applications for Formula Grants are published to all users as a pending task. The application will show as a pending task for all users until it is owned. At which time, all pending tasks will be dismissed, and the user must manage the completion of the application by the application deadline.

List of All Tasks

Page Size25<<<1 - 10>>>

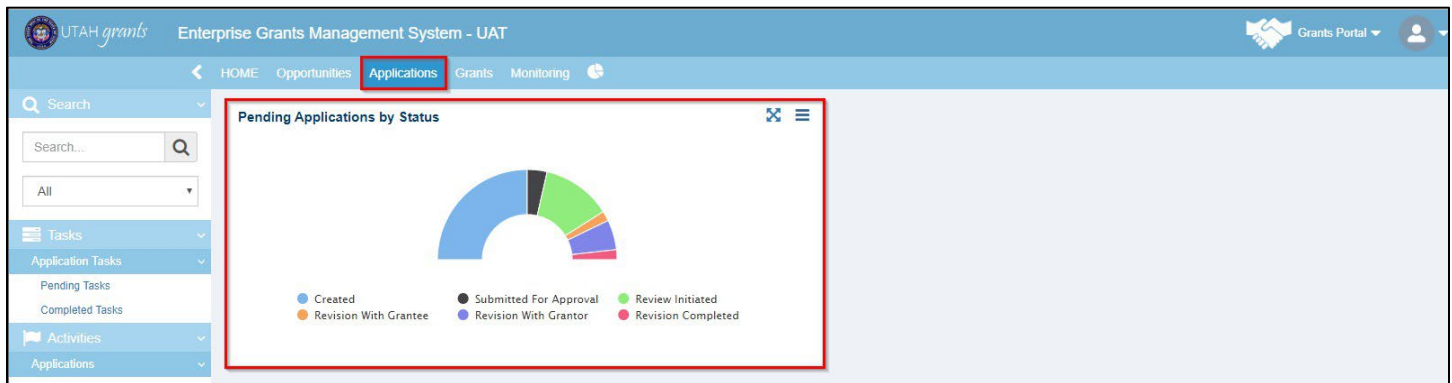
User Name

SearchClear

| EGMS Id      | Subject                                                   | Due Date  | Assigned To                          |
|--------------|-----------------------------------------------------------|-----------|--------------------------------------|
| AR-3366      | Revise Amendment Request                                  | 6/18/2019 | <a href="#">Chip Koop</a>            |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Barry Beckstrand</a>     |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Blaine Edman</a>         |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Carolyn Merrill</a>      |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Carrie Whitney</a>       |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Diane Bartlome</a>       |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Garrick Peterson</a>     |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Joe Backman</a>          |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Jackie Ketchersid</a>    |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Jana Stutz</a>           |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Kip Bromley</a>          |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Chip Koop</a>            |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Linda Gardner</a>        |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Maritza Monterrosa</a>   |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Michelle Price</a>       |
| AD-USBE--964 | 19PUO Digital Teaching and Learning Ongoing - 2019 - 2019 | 6/25/2019 | <a href="#">Rachelle Bolingbroke</a> |

#### 4. Pending Applications by Status

- On the Applications Screen, a donut chart showing pending applications by status is displayed.
- Hovering over the slice will show the number of items in that status.



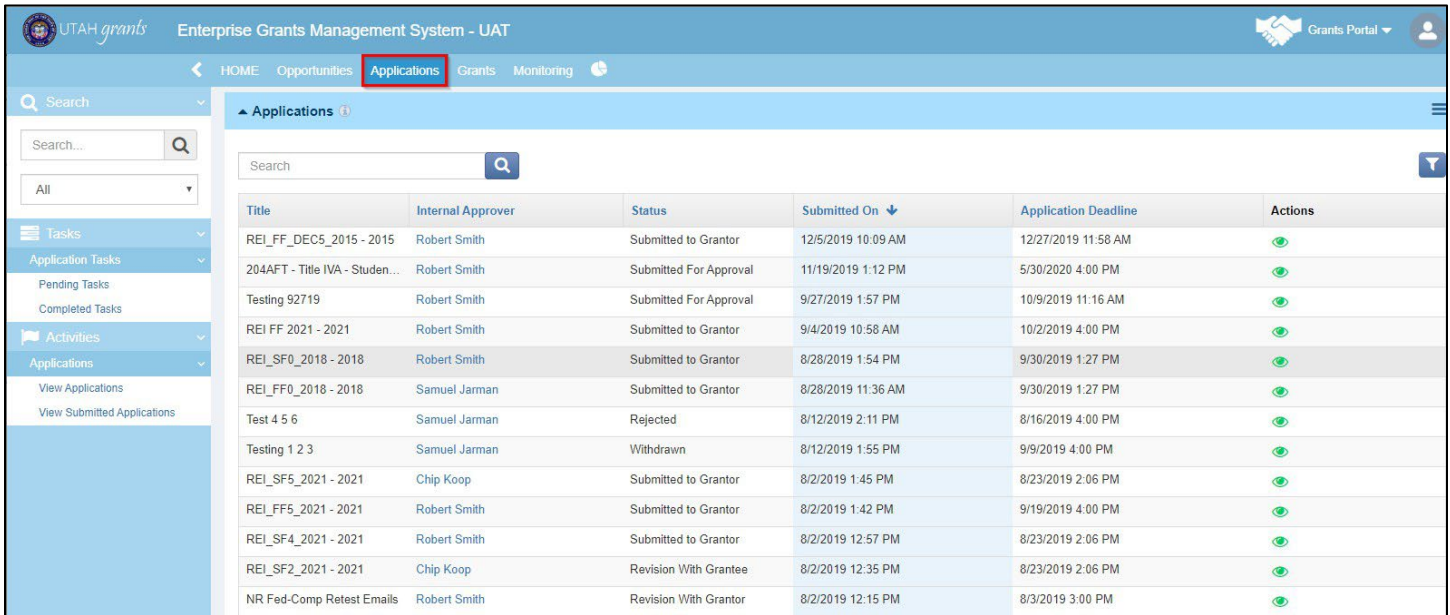
- Click on the slice to show detail of the pending applications within the status selected.
- From this data, you can select “View” to be taken directly to the application.

| Applications in Status: Created |                        |                                            |                     |                      |
|---------------------------------|------------------------|--------------------------------------------|---------------------|----------------------|
| ID                              | Applicant Organization | Program Title                              | Created Date        | Action               |
| AP-400-3378                     | Alpine School District | 202FT-NEW Title IIA - Formula Flow Through | 2019-05-29 18:24:31 | <a href="#">View</a> |
| AP-400-3709                     | Alpine School District | REI_FF3_2021                               | 2019-07-02 19:45:44 | <a href="#">View</a> |
| AP-400-3713                     | Alpine School District | REI_FF4_2021                               | 2019-07-03 15:34:05 | <a href="#">View</a> |
| AP-400-3729                     | Alpine School District | REI_FF2_2015                               | 2019-07-23 18:42:54 | <a href="#">View</a> |
| AP-400-3734                     | Alpine School District | REI_FF1_2020                               | 2019-07-24 14:05:38 | <a href="#">View</a> |
| AP-400-3823                     | Alpine School District | Title 1A - Testing                         | 2019-10-09 17:55:35 | <a href="#">View</a> |
| AP-400-3827                     | Alpine School District | LSA_2015                                   | 2019-10-10 15:40:22 | <a href="#">View</a> |
| AP-400-3831                     | Alpine School District | REI_FF_MOE_2020                            | 2019-10-18 18:41:35 | <a href="#">View</a> |
| AP-400-3835                     | Alpine School District | REI_FF_MOE1_2020                           | 2019-10-23 20:24:05 | <a href="#">View</a> |
| AP-400-3839                     | Alpine School District | REI_FF_MOE1_2020                           | 2019-10-23 20:24:11 | <a href="#">View</a> |
| AP-400-3843                     | Alpine School District | REI_FF_MOE1_2020                           | 2019-10-23 20:24:14 | <a href="#">View</a> |
| AP-400-3847                     | Alpine School District | 20T1FT Title IA                            | 2019-10-28 18:46:28 | <a href="#">View</a> |
| AP-400-3909                     | Alpine School District | 20T1FT Title I Part A                      | 2019-10-28 20:11:30 | <a href="#">View</a> |
| AP-400-3929                     | Alpine School District | Title4_testing_2019                        | 2019-11-07 15:09:01 | <a href="#">View</a> |

- Click on Enhanced View or Menu: Show All Data links  to get further details on all data associated with the dashboard.

## 5. Applications table

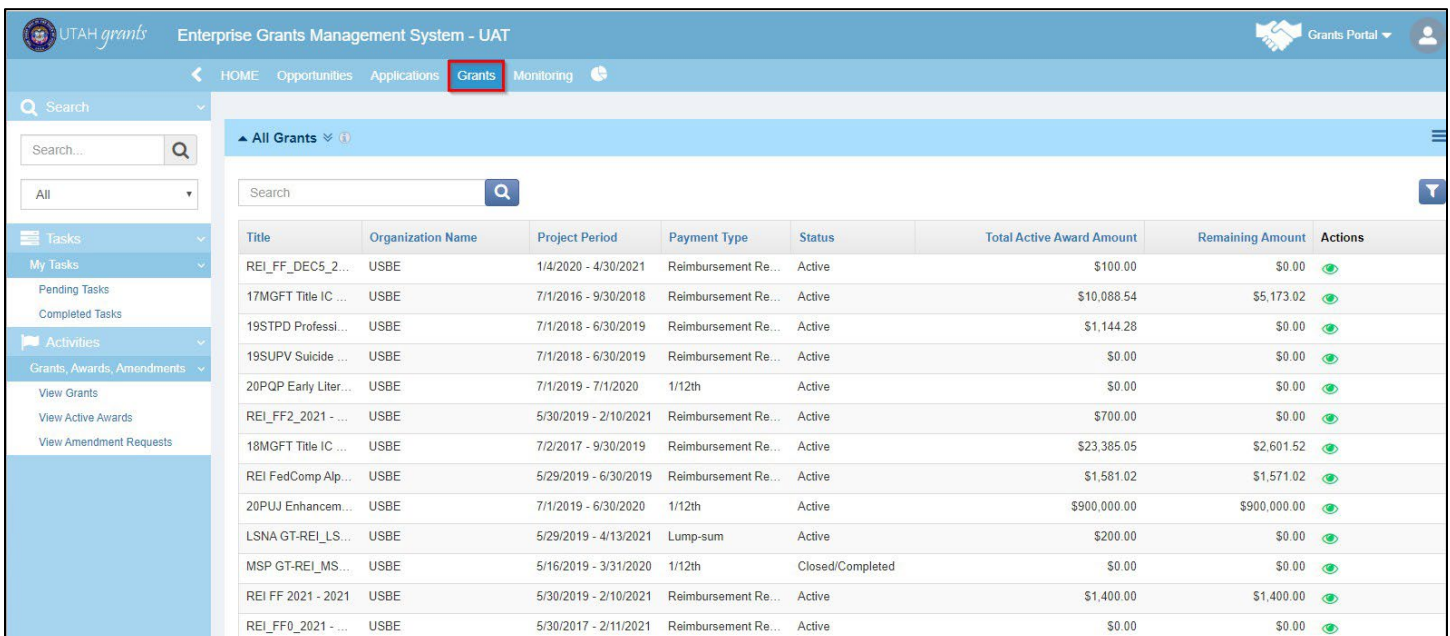
- On the Applications Screen, a table showing Status, when the Application was Submitted, and the Application Deadline is displayed.
- You can sort the information on this table by clicking on the column headings.
- For any applications that were not submitted, the Submitted On field will be blank.



| Title                          | Internal Approver | Status                 | Submitted On       | Application Deadline | Actions |
|--------------------------------|-------------------|------------------------|--------------------|----------------------|---------|
| REI_FF_DEC5_2015 - 2015        | Robert Smith      | Submitted to Grantor   | 12/5/2019 10:09 AM | 12/27/2019 11:58 AM  |         |
| 204AFT - Title IVA - Studen... | Robert Smith      | Submitted For Approval | 11/19/2019 1:12 PM | 5/30/2020 4:00 PM    |         |
| Testing 92719                  | Robert Smith      | Submitted For Approval | 9/27/2019 1:57 PM  | 10/9/2019 11:16 AM   |         |
| REI_FF_2021 - 2021             | Robert Smith      | Submitted to Grantor   | 9/4/2019 10:58 AM  | 10/2/2019 4:00 PM    |         |
| REI_SF0_2018 - 2018            | Robert Smith      | Submitted to Grantor   | 8/28/2019 1:54 PM  | 9/30/2019 1:27 PM    |         |
| REI_FF0_2018 - 2018            | Samuel Jarman     | Submitted to Grantor   | 8/28/2019 11:36 AM | 9/30/2019 1:27 PM    |         |
| Test 4 5 6                     | Samuel Jarman     | Rejected               | 8/12/2019 2:11 PM  | 8/16/2019 4:00 PM    |         |
| Testing 1 2 3                  | Samuel Jarman     | Withdrawn              | 8/12/2019 1:55 PM  | 9/9/2019 4:00 PM     |         |
| REI_SF5_2021 - 2021            | Chip Koop         | Submitted to Grantor   | 8/2/2019 1:45 PM   | 8/23/2019 2:06 PM    |         |
| REI_FF5_2021 - 2021            | Robert Smith      | Submitted to Grantor   | 8/2/2019 1:42 PM   | 9/19/2019 4:00 PM    |         |
| REI_SF4_2021 - 2021            | Robert Smith      | Submitted to Grantor   | 8/2/2019 12:57 PM  | 8/23/2019 2:06 PM    |         |
| REI_SF2_2021 - 2021            | Chip Koop         | Revision With Grantee  | 8/2/2019 12:35 PM  | 8/23/2019 2:06 PM    |         |
| NR Fed-Comp Retest Emails      | Robert Smith      | Revision With Grantor  | 8/2/2019 12:15 PM  | 8/3/2019 3:00 PM     |         |

## 6. All Grants table

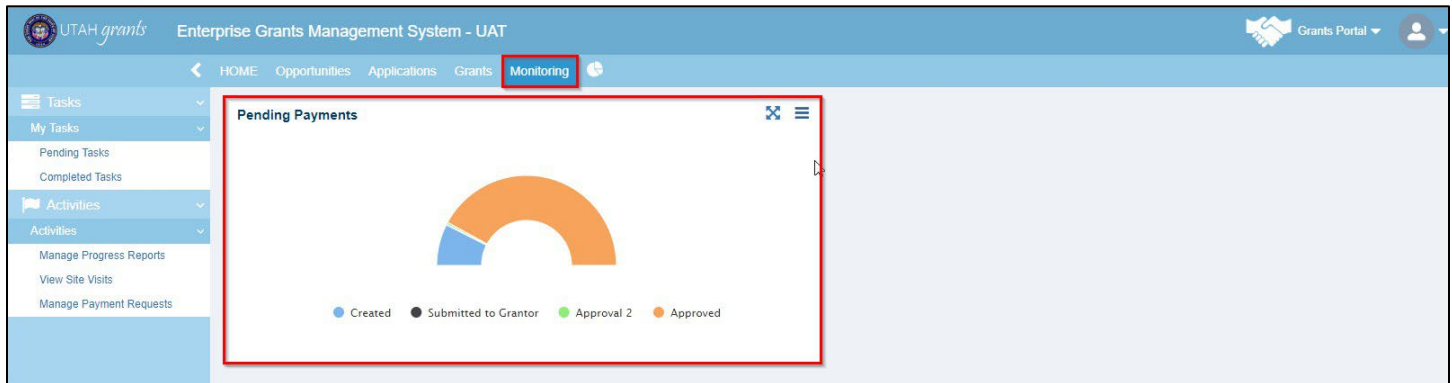
- On the Grants Screen, a table showing Payment Types (Reimbursement Required, Lump-Sum, and App 1/12) is displayed.
- You can sort the information on this table by clicking on the column headings.
- This table shows the Project Period, the Status of the program, Total Amount Awarded, and the Remaining Amount by program.



| Title                | Organization Name | Project Period        | Payment Type        | Status           | Total Active Award Amount | Remaining Amount | Actions |
|----------------------|-------------------|-----------------------|---------------------|------------------|---------------------------|------------------|---------|
| REI_FF_DEC5_2...     | USBE              | 1/4/2020 - 4/30/2021  | Reimbursement Re... | Active           | \$100.00                  | \$0.00           |         |
| 17MGFT Title IC ...  | USBE              | 7/1/2016 - 9/30/2018  | Reimbursement Re... | Active           | \$10,088.54               | \$5,173.02       |         |
| 19STPD Professi...   | USBE              | 7/1/2018 - 6/30/2019  | Reimbursement Re... | Active           | \$1,144.28                | \$0.00           |         |
| 19SUPV Suicide ...   | USBE              | 7/1/2018 - 6/30/2019  | Reimbursement Re... | Active           | \$0.00                    | \$0.00           |         |
| 20POP Early Liter... | USBE              | 7/1/2019 - 7/1/2020   | 1/12th              | Active           | \$0.00                    | \$0.00           |         |
| REI_FF2_2021 - ...   | USBE              | 5/30/2019 - 2/10/2021 | Reimbursement Re... | Active           | \$700.00                  | \$0.00           |         |
| 18MGFT Title IC ...  | USBE              | 7/2/2017 - 9/30/2019  | Reimbursement Re... | Active           | \$23,385.05               | \$2,601.52       |         |
| REI FedComp Alp...   | USBE              | 5/29/2019 - 6/30/2019 | Reimbursement Re... | Active           | \$1,581.02                | \$1,571.02       |         |
| 20PUJ Enhancem...    | USBE              | 7/1/2019 - 6/30/2020  | 1/12th              | Active           | \$900,000.00              | \$900,000.00     |         |
| LSNA GT-REI_LS...    | USBE              | 5/29/2019 - 4/13/2021 | Lump-sum            | Active           | \$200.00                  | \$0.00           |         |
| MSP GT-REI_MS...     | USBE              | 5/16/2019 - 3/31/2020 | 1/12th              | Closed/Completed | \$0.00                    | \$0.00           |         |
| REI_FF_2021 - 2021   | USBE              | 5/30/2019 - 2/10/2021 | Reimbursement Re... | Active           | \$1,400.00                | \$1,400.00       |         |
| REI_FF0_2021 - ...   | USBE              | 5/30/2017 - 2/11/2021 | Reimbursement Re... | Active           | \$0.00                    | \$0.00           |         |

## 7. Pending Payment Requests – USBE

- On the Monitoring Screen, a donut chart showing pending payment requests by status is displayed.
- Hovering over the slice will show the number of items in that status.



- Click on the slice to show details of the pending payment request within the selected status.
- From this data, you can select “View” to be taken directly to the payment request.

| Award Title                                               | Recipient Organization | Owner         | Approver | Requested Amount this Action | Action               |
|-----------------------------------------------------------|------------------------|---------------|----------|------------------------------|----------------------|
| MSP AD-- GRADES_1_12_2019-010-2019-4                      | Alpine School District | Jaime Barrett |          | \$17,100,864.10              | <a href="#">View</a> |
| MSP AD-- KINDERGARTEN_2019-010-2019-4                     | Alpine School District | Jaime Barrett |          | \$751,134.38                 | <a href="#">View</a> |
| MSP AD-- PROFESSIONAL_STAFF_2019-010-2019-3               | Alpine School District | Jaime Barrett |          | \$1,766,264.32               | <a href="#">View</a> |
| MSP AD-- SCHOOL_NURSE_2019-010-2019-2                     | Alpine School District | Jaime Barrett |          | \$8,810.78                   | <a href="#">View</a> |
| MSP AD-- ENHANCEMENT_FOR_ACCEL_2019-010-2019-1            | Alpine School District | Jaime Barrett |          | \$24,035.42                  | <a href="#">View</a> |
| MSP AD-- SPECIAL_EDUCATION_IMPACT_2019-010-2019-1         | Alpine School District | Jaime Barrett |          | \$55,970.89                  | <a href="#">View</a> |
| MSP AD-- SPECIAL_EDUCATION_SELF_CONTAINED_2019-010-2019-1 | Alpine School District | Jaime Barrett |          | \$420,599.63                 | <a href="#">View</a> |

## 8. Monitoring Schedule for all Active Grants table

- On the Monitoring Screen, a table is displayed showing Payment Types (Reimbursement Required, Lump-Sum, and App 1/12).
- You can sort the information in this table by clicking on the column headings.
- This table shows the Grant Period, Payment Type, Total Amount Awarded, and Status.

UTAH grants Enterprise Grants Management System - UAT Grants Portal

HOME Opportunities Applications Grants **Monitoring**

Tasks  
My Tasks  
Pending Tasks  
Completed Tasks  
Activities  
Activities  
Manage Progress Reports  
View Site Visits  
Manage Payment Requests

**Monitoring Schedule for all Active Grants**

This Section Manages Post Award Activities for Grant as below:

Search

|  | Title                                   | Grantor Organization | Grant Period          | Payment Type           | # Awards | Total Active Award Amount | Status | Actions |
|--|-----------------------------------------|----------------------|-----------------------|------------------------|----------|---------------------------|--------|---------|
|  | REI_FF2_2021 - 2021                     | USBE                 | 5/30/2019 - 2/10/2021 | Reimbursement Required | 6        | \$700                     | Active |         |
|  | 19POX USTAR 2019                        | USBE                 | 7/1/2018 - 10/15/2019 | Reimbursement Required | 1        | \$473,600                 | Active |         |
|  | 19SUPV Suicide Prev - Secondary - ...   | USBE                 | 7/1/2018 - 6/30/2019  | Reimbursement Required | 2        | \$0                       | Active |         |
|  | REI_FF0_2018 2018                       | USBE                 | 5/30/2017 - 2/11/2021 | Reimbursement Required | 2        | \$0                       | Active |         |
|  | 18SIAC IDEA St Level Activities Pres... | USBE                 | 7/1/2018 - 6/30/2019  | Reimbursement Required | 1        | \$15,000                  | Active |         |
|  | 18IMM Title IIIA - Immigrant - 2018     | USBE                 | 7/1/2017 - 9/30/2019  | Reimbursement Required | 1        | \$28,698.89               | Active |         |
|  | 18FTFL IDEA School Age - Flow Thro...   | USBE                 | 7/1/2017 - 9/30/2019  | Reimbursement Required | 1        | \$5,043,732.21            | Active |         |
|  | REI_FF 2021 - 2021                      | USBE                 | 5/30/2019 - 2/10/2021 | Reimbursement Required | 2        | \$1,400                   | Active |         |
|  | 19STPD Professional Development f...    | USBE                 | 7/1/2018 - 6/30/2019  | Reimbursement Required | 3        | \$1,144.28                | Active |         |
|  | 19PUO Digital Teaching and Learning...  | USDC                 | 7/1/2010 - 12/31/2019 | Reimbursement Required | 1        | \$2,221,005.66            | Active |         |