Memo

To: All Concordia Researchers

cc: Faculty Financial Officers, Associate Deans of Research, Assoc VP Fin & Controller, Chief Financial Officer, Assoc VP, Research, Policy, Entrepreneurship & Impact/VPRII Assoc VP, Strategic Institutional Initiatives/VPRII, VP, Research, Innovation and Impact/VPRII Faculty Dean, Deputy Provost and Vice-Provost, Faculty Development and Inclusion.

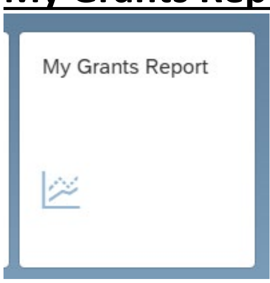
From: Angela Luciano, Director, Research and Restricted Financial Management (RRFM)

Date: September 17,2026

Re: **Researcher dashboard Update**

We are pleased to advise you of several new enhancements to the researcher dashboard designed to make the administration and monitoring of your research funds easier to review, understand and trace. These changes provide additional details to help you identify the source of the transaction, review available grant balances, and access supplier or document information without having to open multiple source documents or reports.

My Grants Report tile:



What is changing?

- The report now provides more detailed transaction references to help you understand where a posting comes from.
- A new available balance column has been added to support grant balance review.
- Additional fields are now available to provide more context about each transaction.

New functionality available

- **Enhanced transaction references:** The Reference field now displays more meaningful source information depending on the type of transaction. For example, you may see an Expense Report number, Journal Voucher reference, invoice number, Check Requisition/OPR number, Purchase Order number, or other relevant reference. This makes it easier to trace a transaction back to its source.

- **New available balance column:** The report now includes an available balance column for grants. This amount is calculated using the following logic: Budget minus Commitments minus Actuals equals Available Balance. This provides a clearer view of the remaining funds available on a grant directly from this report.

- **Additional transaction details:** The report now includes additional fields to provide more context about each transaction. These fields help you better understand the transaction type, supplier or business partner information, and document-level details directly within the report.

    - **Ref. Procedure name:** Shows the type or source of transaction, such as Expense Report, HR payroll settlement, accounting document, Purchase Requisition, Purchase Order, or other transaction categories.
    - **Supplier:** Shows the Supplier or Business Partner number when applicable.
    - **Name:** Shows the Supplier or Business Partner name when applicable.
    - **Document Header Text:** Shows useful document-level information such as Ariba receipt numbers, expense transfer details, expense report information, or other context entered at the document header level.
    - **Reference:** Shows the relevant reference based on the transaction context, such as an Expense Report number, Non-PO or PO Invoice number, Check Requisition/OPR number, Purchase Order number, or Journal Voucher reference.

- **Improved description for goods receipts:** When a goods receipt is posted and recorded as an expense, the Description field now includes the related Purchase Requisition or Purchase Order line-item description. This gives you clearer visibility into the goods or services received.

What this means for you

- You will have more information available directly in the My Grant Report tile.
- You will be able to identify transaction sources more quickly.
- You will have a clearer view of available grant balances at your fingertips.
- You will be better equipped to review grant activity and follow up on transactions with the right supporting information.

Overall, these enhancements are intended to make the My Grant Report tile more useful and efficient by bringing key grant, balance, and transaction details together in one place, reducing the need to consult multiple source documents.

If you have any questions or need assistance, please contact the RRFM team.

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Thank you,
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