



Using Smartsheet to Manage Multi-Institution Research Grants

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College of Engineering



New Mexico State University

Schedule of Discussion



1. Welcome and Overview

2. Background Information

- Project management foundation
- Project lifecycle
- Project management software

3. Structuring the Work

- DigiCARES administrative workflow
- Logs, forms, trackers, reporting, and EDOCS

4. Financial Visualization

- DREAM dashboard examples
- Budget and expenditure tracking
- Financial reporting workflows

5. Closing Remarks

- Key takeaways
- Limitations
- Questions

BACKGROUND INFORMATION

RESEARCH GRANTS ARE PROJECTS



Projects Used as Examples

	DigiCARES	DREAM
Full Project Title	Accelerating Community-Centric Energy Transformation through AI-driven Digital Twinning for Climate-Aware Resilience	Research Center for Distributed Resilient and Emergent-Intelligence-Based Additive Manufacturing
NSF Award Number	OIA-2418359	OIA-2417062
NSF Program / Award Type	RII FEC	E-RISE RII
Lead Institution	New Mexico State University	New Mexico State University
Principal Investigator	Di Shi	Satyajayant Misra
Award Amount	\$6,000,000	\$7,000,000
Project Duration	4-Years	4-Years
Partner Institutions	New Mexico State University; Montana State University; Oklahoma State University; University of Alabama in Huntsville; NSF National Center for Atmospheric Research	New Mexico State University; University of New Mexico; Navajo Technical University; New Mexico Institute of Mining and Technology

What is a Project?

“A project is a temporary endeavor undertaken to create a unique product, service, or result.” – Project Management Institute (PMI)

Has:

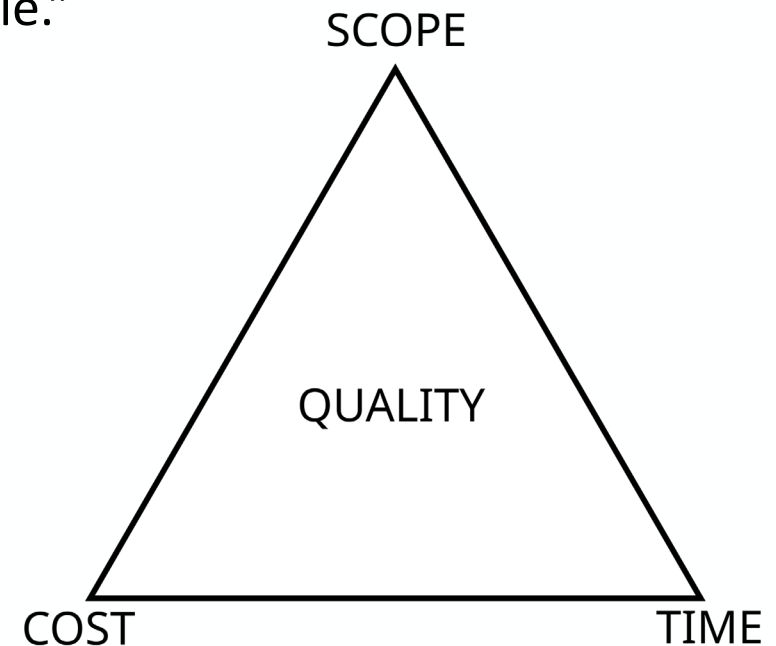
- Defined start and end
- Defined scope and outcomes
- Structured tasks and deliverables

What is Project Management?

“...the application of knowledge, skills, tools, and techniques to project activities to meet project requirements...practice of planning, organizing, and executing the tasks needed to turn a brilliant idea into a tangible product, service, or deliverable.”

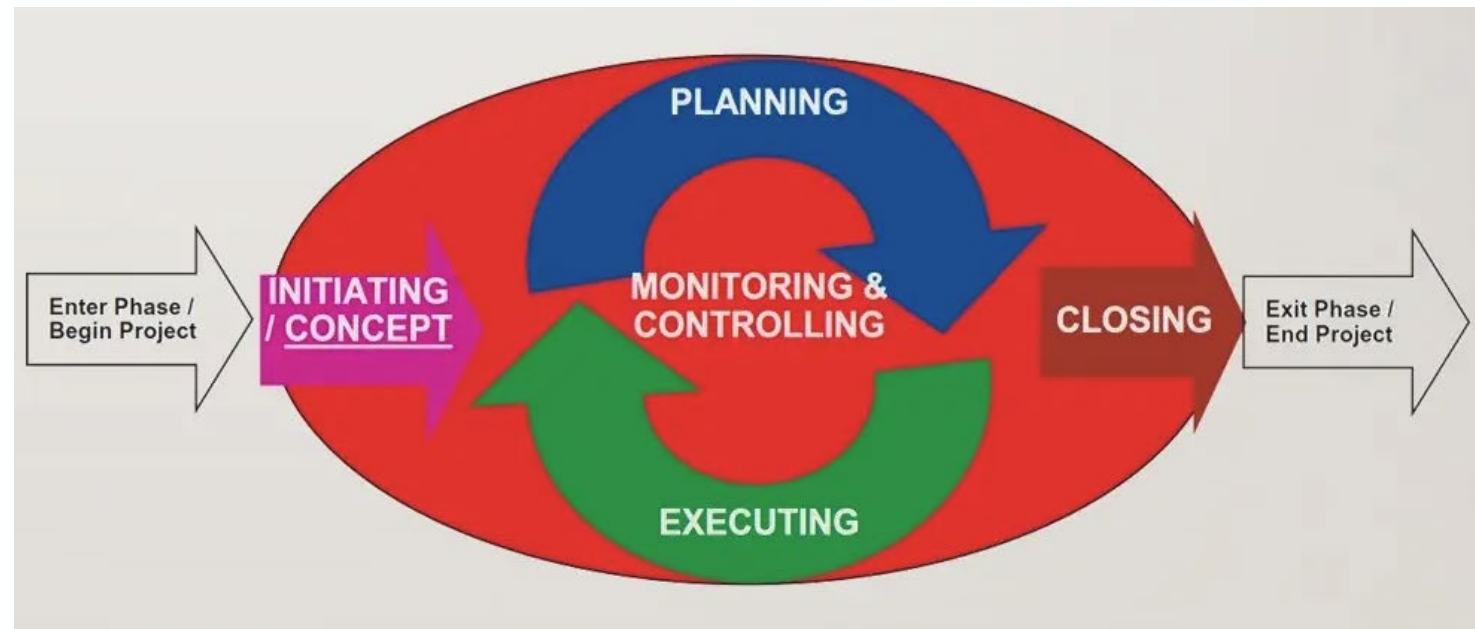
Key aspects of project management include:

- Defining scope
- Identifying deliverables
- Managing risks
- Supporting cross-team communication



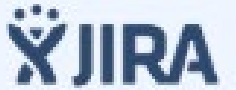
The Project Lifecycle

- Initiation (award, negotiation, setup)
- Planning (WBS, scope, roles)
- Execution (research, outreach)
- Monitoring & Controlling (reports, finances)
- Closing (final reports, reconciliation)



Project Management Software

- Centralize project information in one system of record
- Enable structured, consistent reporting
- Connect distributed teams and reduce silos
- Track deliverables, ownership, and progress
- Align performance with financial tracking
- Provide real-time visibility into project status
- Disclaimer



Where Grant Management Gets Difficult

Common Grant Management Challenges

- Distributed teams and institutions
- Personnel and student turnover
- Research products and deliverables
- Scope, budget, and administrative changes
- Outreach, collaboration, and broader impacts
- Sponsor reporting requirements

Project management systems support

- Coordination
- Documentation
- Visibility
- Accountability
- Reporting readiness



Structuring the Work

DIGICARES ADMINISTRIVIA

	Term	Working Definition
	WBS	Structured breakdown of the project's research plan or strategic plan
	Task	Major project goal or work area
	Subtask	Smaller component of a task
	Activity	Specific, trackable unit of work
	Definition of Done	Criteria used to determine whether an activity is complete
	Product	Project output such as a publication, presentation, proposal, dataset, or deliverable



Work Breakdown Structure

Deliverable	WBS	Task / Deliverable	Assigned To	Status	% Complete	Start Date	End Date	Duration
★	0	Anthony's Birthday Party						
★	1	▼ Food			60%	03/23/26	08/14/26	103d
★	1.1	▶ Order catering	M mother@mom.com	In Progress	42%	03/23/26	04/23/26	23d
★	1.2	Receive food	M me@me.com	Blocked	65%	04/23/26	08/14/26	81d
★	2	▼ Presents			65%	01/01/26	04/27/26	81d
★	2.1	▼ Assign gift responsibilities	M me@me.com	In Progress	66%	01/01/26	04/01/26	64d
★	2.1.1	Create wish list	M me@me.com	Completed	100%	01/01/26	01/30/26	21d
★	2.1.2	Share wish list with guests	M me@me.com	In Progress	50%	02/02/26	03/31/26	42d
★	2.1.3	Issue Assignments	M me@me.com	Not Started	0%	04/01/26	04/01/26	1d
★	2.2	Receive presents	M me@me.com	Not Started	0%	04/27/26	04/27/26	1d
★	3	▼ Entertainment			0%	04/13/26	04/27/26	11d
★	3.1	▶ Confirm entertainment schedule	M mother@mom.com	Not Started	0%	04/13/26	04/13/26	1d
★	3.2	Be entertained	M me@me.com	Not Started	0%	04/27/26	04/27/26	1d

Conversations

AM Anthony Moyer
Edited 9/4/2025 at 3:32pm

For the last two items "LLM is capable of integrating feedback..." and "Validate and analyze the practicality..."
Are both of these items saying the same thing?

Less

Praveen Verma
9/4/2025 at 3:44pm

Done. Please have a look and let me know if you need any clarification."

← Reply

WBS Tracking Metrics

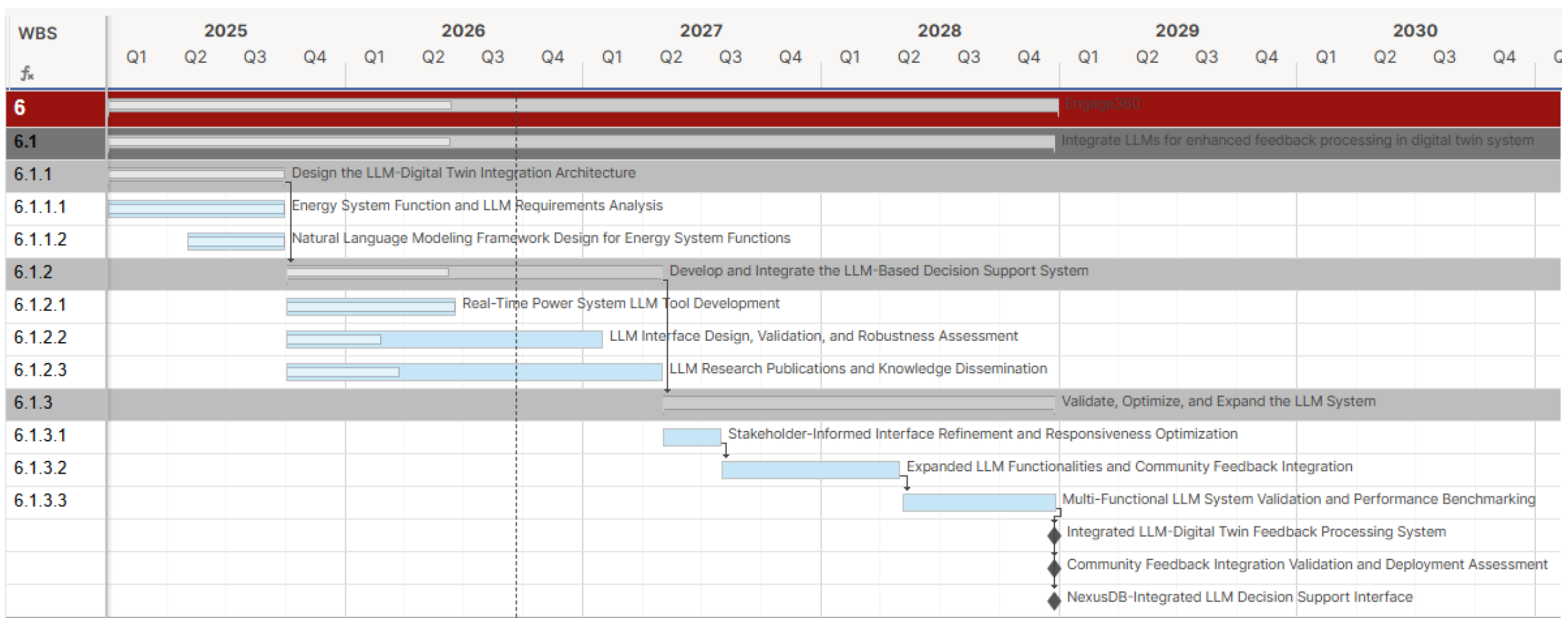
Status	Accountable	Responsible	% Complete	Start Date	End Date	Duration	Predecessors	Baseline Start	Baseline Finish	Variance
	NMSU	NMSU ALL	61%	11/01/25	11/17/26	261d		11/01/25	04/30/26	-142d
Completed	NMSU	NMSU ALL	100%	11/01/25	12/23/25	36d		11/01/25	12/23/25	0
In Progress	NMSU	NMSU ALL	80%	11/01/25	01/30/26	56d		11/01/25	01/30/26	0
	NMSU	NMSU ALL	50%	02/02/26	06/03/26	86d	3: Create shortlis...	03/01/26	04/30/26	-23d
Completed	NMSU	NMSU ALL	100%	11/01/25	01/30/26	56d		11/01/25	01/30/26	0
In Progress	NMSU	NMSU ALL	30%	06/04/26	11/17/26	119d	4: Review confir... 5: Develop advis...	11/01/25	04/30/26	-142d

"I Don't Know What That Is"

WBS	Task / Deliverable	Description / Definition of Done
f_x	①	
6	Engage360	
6.1	Integrate LLMs for enhanced feedback processing in digital twin system	
6.1.1	Design the LLM-Digital Twin Integration Architecture	
6.1.1.1	Energy System Function and LLM Requirements Analysis	- Identify critical energy system functions, model and mathematical formulations. - Identify existing LLM models, workflow, and specifications to determine the one best suited for the proposed work. - Identify and interpret the digital twin models, their interactions with the external environment and potential interface functionalities. - Understand and develop the digital twin-LLM procedure, addressing complexities and underlying principles
6.1.1.2	Natural Language Modeling Framework Design for Energy System Functions	- Develop equivalent natural language models (e.g., forecasting, optimal power flow, voltage control, frequency control) for the identified energy system functions, model, mathematical formulations. - Review literature on LLM parameter adjustment and hyperparameter tuning to identify the best practices

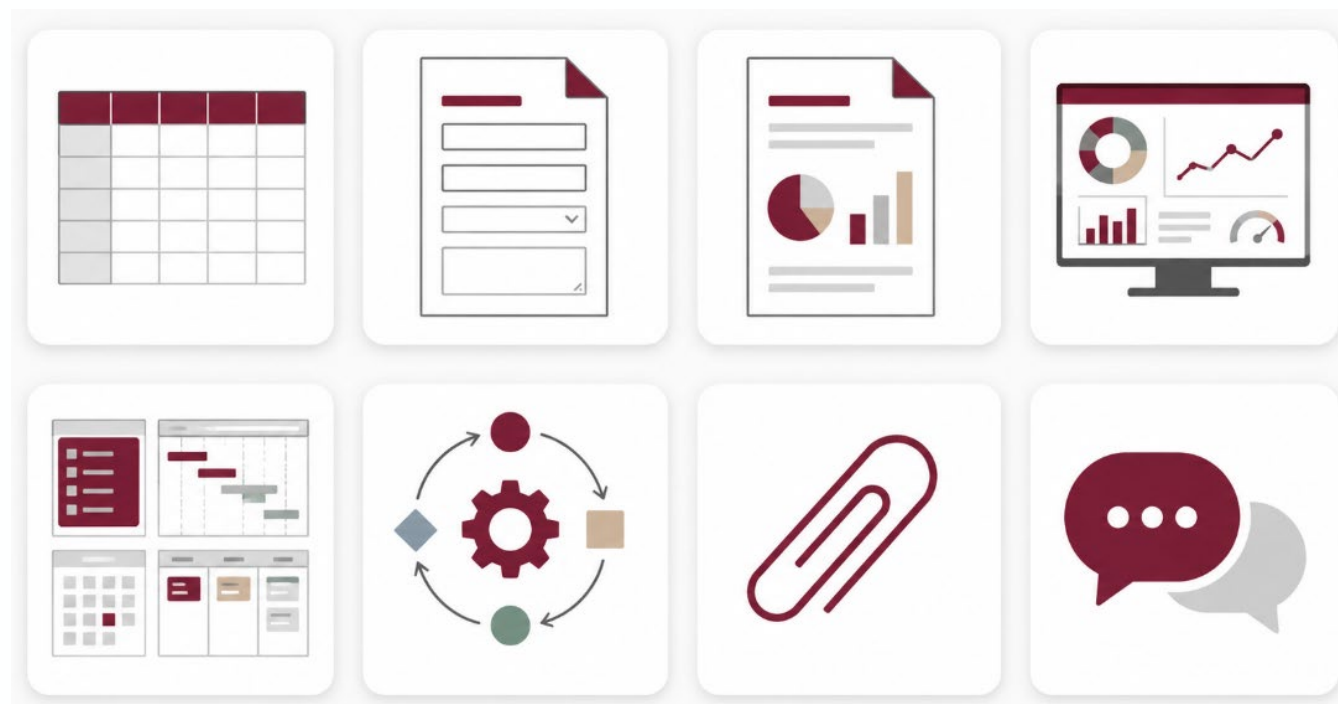


Gantt View



Basic Smartsheet Components

- Sheets
- Forms
- Views
- Automations
- Attachments and comments
- Reports
- Dashboards



Attachments

Project Team All Call ▼ + Add



20260331_DigiCARESdocx
2 months ago • Anthony Moyer



DigiCARES Project All-C....mp4
2 months ago • Anthony Moyer



20260331_DigiCARESpptx
2 months ago • Anthony Moyer

20

Project-Specific Design

Name	Office	Title/Role	Responsibility
 NMSU Leadership			
Wang, Fengyu	Electrical and Computer Engineering (ECE)	Principal Investigator	1st POC for Technical Functions 2nd POC for Administrative Functions 2nd POC for Financial Functions Responsible for the overall technical direction and day-to-day execution of the project Leads and oversees all technical work in alignment with the SOPO, milestones, and deliverables Provides scientific and technical leadership to project team members and partners Ensures the quality, integrity, and timely completion of technical outputs and reports
Moye, Anthony	Electrical and Computer Engineering (ECE)	Project Manager	1st POC for Administrative Functions 1st POC for Financial Functions Responsible for oversight of the award's administrative and business operations, including financial management, fiscal oversight, resource coordination, and award administration Supports the PI by managing project operations, timelines, and coordination across administrative functions Serves as a primary liaison between the PI and the sponsoring agency on administrative and operational matters Prepares and routes documentation to OER and RAS for review and processing Coordinates final compliance checks to ensure adherence to institutional and sponsor requirements Provides centralized administrative support functions similar to a mini OER for the project Conducts ongoing fiscal monitoring and tracks budget performance against the approved plan



Products and Research Outputs

Team	Published Date	Authors	Title	Type	Status	DOI or URL	Journal	# Trainee or Early Career Faculty Involved	Abstract	Peer Reviewed	RII FEC Support	NSF Acknowledgement
⤴		⤴	①									
OSU	12/08/25	S. Chung, Y. Zhang, M. Yue, H. Cui	Network Interdependency-Informed Power System Dynamic Trajectory Prediction Utilizing Black-Box Modeling of Inverter-Based Resources	Journal Article	Under Re...		IEEE Transaction on Power Systems	One trainee and one early faculty	Black-box modeling of inverter-based resources (IBRs) has become essential for real-time grid operation and control in the presence of proprietary electronic control architectures. Existing machine learning (ML)-based online dynamic trajectory prediction approaches using IBR black-box models either significantly accumulate prediction errors when multiple surrogates are simultaneously used or ignore measurement errors, limiting their deployment in practical grids. To address these limitations, this paper proposes a novel network interdependency informed ML algorithm for online dynamic trajectory prediction in IBR-integrated power systems. A modular spatiotemporal attention network (STAN)-based predictor for the black-box modeling of each IBR unit is first proposed. Utilizing past measurements, the proposed STAN can effectively capture and predict the spatiotemporal dynamics of IBRs by employing an attention mechanism to attend to the most pertinent features for trajectory prediction. Furthermore, a novel hybrid physics informed loss function that integrates a decoupled linearized AC power flow formulation is proposed. The proposed loss function effectively ensures physical consistency of predictions within network operation while avoiding the computational complexity of iterative power flow solving, thereby enabling efficient gradient backpropagation and overall improved prediction accuracy. Case studies on the IEEE 14- and WECC 179-bus systems demonstrate that the proposed method achieves significant accuracy enhancement and robustness against measurement errors, outperforming recent ML-based trajectory prediction methods.	Yes	Primary	Yes
OSU	12/25/24	S. Chung, Y. Zhang, Y. Zhang	Knowledge-Inspired Data-Aided Robust Power Flow in Distribution Networks with ZIP Loads and High DER Penetration	Journal Article	Published	10.1109/TIA.2024.352	IEEE Trans. Industrial Applications	Two trainee and one early faculty	Characterized by increasing penetration of distributed energy resources, active distribution networks necessitate developing uncertainty-adaptive power flow (PF) algorithms to cover broad operating conditions. Despite the success of data-driven methods in improving such adaptivity, the efficacy of these methods relies heavily on large, precise, and outlier-free datasets, which limits their materialization in practical grids. To address these dual issues, this paper proposes a knowledge-inspired data-aided robust PF algorithm in unbalanced distribution systems with ZIP load models and high penetration of distributed energy resources. The proposed method first uses Taylor expansion to derive an explicitly analytical linear solution for the PF calculation. A data-driven support vector regression-based method is further proposed to mitigate the approximation loss of the linearized PF model, which might surge in widening voltage variations. Inspired by physical knowledge of distribution system operation, the proposed method can adapt to a wide range of operating conditions without retraining and thus can be applied to passive/active distribution networks. Case studies in the IEEE 13- and 123-bus unbalanced feeders illustrate that the proposed algorithm exhibits superior computation efficiency and guaranteed accuracy, under variable penetration levels and lightweight datasets.	Yes	Partial	Yes
OSU	03/02/26	Y. Zhang, Y. Zhang, L. Wang	Meteorological-Data-Aided Distribution System Operation with Weather-Dependent Line Parameter Calibration and DER Generation Forecasting	Journal Article	Published	10.1109/TIA.2026.369	IEEE Transaction on Industry Application	Two trainee and one early faculty	Reliable distribution system operation is increasingly challenged by the weather-induced variability of both line parameters and distributed energy resource (DER) generation. Existing weather-dependent power flow (WDPF) methods primarily focus on the impact of ambient conditions on overhead conductors, neglecting the joint influence of weather-induced DER fluctuations on network operation. Moreover, accurately estimating line parameters under various weather conditions remains computationally intensive due to the complexity of heat-balance equations. To address these issues, this paper proposes a comprehensive WDPF method that leverages meteorological data to simultaneously predict DER generation, update line parameters, and perform sensitivity analysis in unbalanced distribution systems. First, a novel attention-based temporal convolutional network is proposed to forecast DER output by dynamically focusing on essential weather features via an attention mechanism to capture temporal dependencies. Meanwhile, fully connected networks (FCN) are employed to accelerate line temperature estimation and parameter calibration. The predicted DER generation and updated line parameters are then integrated into the WDPF framework, enabling a comprehensive modeling of weather effects. Additionally, an FCN-based weather sensitivity analysis is developed to quantify the incremental impact of weather changes. Comparative case studies on two unbalanced IEEE feeders demonstrate that the proposed method significantly improves the accuracy and computational efficiency of power flow solutions, as well as the convenience of online weather sensitivity analysis.	Yes	Partial	Yes

Standardized Product Collection: Publication Form



DigiCARES New Publication Submission

Team

- ☐ AXIA
 ☐ MSU
 ☐ NMSU
 ☐ OSU
 ☐ UAH
 ☐ NSF

Published Date

mm/dd/yyyy 

Authors

Title

Type

- ☐ Journal Article
☐ Conference Paper
☐ Case Study
☐ Short Report
☐ Abstract
☐ Book Section

Status

What is the status of your publication? This can be updated later.

- ☐ Submitted
☐ Under Review
☐ Accepted
☐ Published
☐ Rejected

DOI or URL

Journal

Trainee or Early Career Faculty Involved

How many trainees or early career faculty were involved in the development of your article?

Abstract

Peer Reviewed

- ☐ Yes
☐ No

RII FEC Support

- ☐ Primary
☐ Partial

NSF Acknowledgement

- ☐ Yes
☐ No

☐ Send me a copy of my responses

Product Tracker Workflow

Submitted (3)	Under Review (8)	Accepted (5)	Published (17)	Rejected (0)
The Impact of State-Level Policies on Renewable Energy Adoption UAH 01/17/26 Shuang Zhao; Nick Meyer; Braeden Hays; Danlu Cai Conference Paper State Politics And Policy Quaterly 3 This paper investigates how different state-level policies ...	Regime-Adaptive Weighted Ensemble Learning for Computing-Driven Dynamic Lo... OSU 04/27/26 Ziying Wang, Ying Zhang, Lei Wang, Yuzhang Lin Conference Paper 10.48550/arXiv.2604.27207 IEEE SmartGridComm 2026 Two trainees and one early-career faculty Short-term load forecasting for AI data centers presents new ...	Temporal Feature Fusion for Wildfire Segmentation in UAV Video MSU 09/30/26 Dmitry Bezborodov, Neda Nazemi, Matt Revelle, and Faraz... Conference Paper Proceedings of the 2026 IEEE International Geoscience and ... 4 Wildfire segmentation from UAV imagery is commonly performed...	The Impact of State-Level Policies on Rewable Energy Adoption UAH 01/08/26 Shuang Zhao;Nick Meyer; Braeden Hays; Danlu Cai Conference Paper Southern Political Science Annual Research Conference 3 This paper investigates how different state-level policies ...	
Physics-Informed Safe Reinforcement Learning for Adaptive Frequency Control of ... OSU 02/06/26 Z. I. Mahmood, Y. Zhang, B. She, and H. Cui Journal Article IEEE Transactions on Industry Applications 3 With the growing deployment of inverter-based resources in ...	Deployment-Efficient Short-Term Load Forecasting in AI Data Centers via Sequence-to-Point ... NMSU OSU 04/27/26 Lei Wang, Jiahao Chen, Ying Zhang, Di Shi Conference Paper https://arxiv.org/pdf/2605.00681 IEEE SmartGridComm 2026	Weighted Ensemble Learning for Short-Term Wind Power Forecasting OSU 02/02/26 L. Cardiel, S. Chung, Y. Zhang Conference Paper Dallas Circuits and System Conference 2026 Two trainee and one early faculty Accurate short-term wind power	Adaptive Frequency Control for Inverter-Based Resources via Equivalent Inertia-Based Deep ... OSU 02/26/26 Z. I. Mahmood, Y. Zhang, H. Cui and A. Ali Conference Paper 10.1109/EESAT65054.2026.11404105 2026 IEEE Electrical Energy Storage Applications and ...	

Logs and Forms Across the Project

- Presentations
- Registered datasets
- Proposals
- Press and media
- Outreach events
- Photos
- Awards and recognitions
- Risks and issues
- Changes

1. DigiCARES

New Mexico State University - New Mexico State University

+ Add to workspace

> Scenario plans

✓ Collections

✓ Workspace items

> 001. Dashboard Assets

> 002. Archive

01. DigiCARES Roster

02. DigiCARES WBS

04. DigiCARES RAID Log

05. DigiCARES Y2 Monthly Summaries

06. DigiCARES Research Presentation Log

✓ 07. DigiCARES Publication Log

DigiCARES New Publication Submission

08. DigiCARES Registered Dataset Tracker

09. DigiCARES Proposal Log

10. DigiCARES Press Tracker

11. DigiCARES Outreach Log

12. DigiCARES Photos

13. Awards and Recognitions

A. DigiCARES Documents

B. DigiCARES Change Log

WBS-Linked Reporting

Team	Task(s)	Month / Year	Completed This Month	Next Steps	Current or Upcoming Obstacles	Administrative Notes / Updates
①						
UAH	4 5	Feb/2026	4.2.2 Sociodemographic Energy Mapping: Tailoring Frameworks for Equity Advanced a research stream led by Danlu Cai and undergraduate researcher Braeden Hayes examining the interaction between renewable energy deployment, grid reliability, and institutional context. Braeden completed collection of utility-level ownership and financial data. He is now investigating state-level finance and infrastructure investment data for integration into the broader analytical framework. Advanced a complementary equity-focused research stream led by Kishan and Mohammed investigating the distributional dimensions of energy and infrastructure vulnerability.	- Continue the literature synthesis and data integration work needed to refine the conceptualization and operationalization of energy equity, with particular attention to infrastructure reliability, utility ownership and governance, and sociodemographic vulnerability, and use these insights to further develop empirical model specifications under the Sociodemographic Energy Mapping component (4.2.2). - Finalize and validate the expanded renewable energy database by incorporating newly collected utility ownership and financial data, solar radiation measures, and additional facility-level and contextual variables, and prepare a stable and well-documented version of the dataset for cross-team analysis and future policy modeling (5.3.1.1).	The original conference venue, UAH's conference center, is currently under renovation. As a result, we are considering two alternative venue options and assessing the advantages and disadvantages of each. The Year 2 budget has not yet been approved, and existing carryover funds are insufficient to cover travel for the Co-PI meeting and summer conferences, as those funds are already heavily committed to undergraduate, PhD student, and postdoctoral stipend and salary support.	I would like to support students in attending summer workshops to build analytical skills, but the available carryover funds for travel have already been used up.

Monthly Summaries

RII FEC: Accelerating Community-Centric Energy Transformation through AI-driven Digital Twinning for Climate-Aware Resilience (DigiCARES)

Monthly Summary Report
1 – 28 February 2026

Submitted 13 March 2026

Submitted To:
Di Shi, Ph.D.
Principal Investigator
New Mexico State University

Submitted By:
Anthony Moye
Sr. Program Specialist
New Mexico State University

NSF Award: 2418359

Task 4: Digital Twinning the Climate-Energy Ecosystem: AI-Driven Simulation and Prediction

Task Lead: Dr. Ying Zhang, OSU

Background:

During Year One, Task Four established the core architecture of the DigiCARES digital twin by developing forecasting models for energy demand and renewable generation, generating high-fidelity operating scenarios, and integrating optimization and cyber-resilience tools into an initial prototype platform.

Over Year Two, Task Four has continued strengthening predictive and uncertainty-aware modeling capabilities supporting the DigiCARES digital twin. Research activities are advancing coordinated solar and load forecasting approaches, probabilistic inference methods, and other predictive tools designed to improve system observability and scenario analysis within complex energy systems.

Field-deployed technologies supporting grid resilience research continue to be refined. In collaboration with Kit Carson Electric Cooperative, Edge-AI wildfire detection cameras remain in operation and the underlying detection models are being improved using accumulated field data to reduce false alerts and improve monitoring performance.

Additional research focuses on improving modeling approaches for grid operation and planning within the digital twin framework. Work includes voltage control strategies, topology-aware modeling techniques, probabilistic state estimation under heterogeneous measurements, and scalable forecasting models for energy system analysis. Task Four also collaborates closely with the DigiCARES social science teams to integrate energy equity considerations into digital twin research, examining relationships between renewable energy deployment, infrastructure reliability, and community vulnerability.

Progress This Month:

- 4.1.2.3 NMSU (Joseph) started to obtain some meaningful results by implementing several state of the art approaches on multi-agent systems with communication and his proposed CCM-based approaches. In the meantime, he has put together a poster titled "Delay-Resilient Voltage Control via Causal Multi-Agent Reinforcement Learning," and submitted it to the Energy x AI Summit to be hosted at San Diego State University. He will attend the workshop in person and present it.

Annual Narrative

Task 3 Deliverables

1. Metrics specifically designed for community-centric, climate-aware energy planning and operation

Outputs

Climate-Aware Resilience Metric Suite Finalized
Metric Applicability Across Target Communities Validated
Operational Guidance for Metric Implementation Published
Finalized Metrics Integrated into NexusDB and Digital Twin Workflows

Primary WBS Alignment

3.1 Develop community-centric and location-based metrics
3.1.1 Develop a robust framework to assess energy system risks
3.1.2 Integrate community-specific requirements into climate-aware resilience metrics

Supporting WBS Elements

3.1.1.1 Critical Energy System Risk Metrics
3.1.1.2 Equity-Focused Indicators and Engineering Measures
3.1.1.3 Integration of Climate Projections with Risk Metrics
3.1.1.4 Best Practices Summary - Interpretable Energy System Metrics
3.1.2.1 Baseline Dataset and Contextual Profile
3.1.2.2 Region-Specific Climate Risk Profile
3.1.2.3 Equity-Impact Assessment

Year 2 Progress

This section is the primary technical narrative for the current reporting cycle and was developed using submitted monthly updates. Please:

- **Review for technical accuracy and completeness**
- **Add clarifications where needed**
- **Ensure important accomplishments, integrations, collaborations, and milestones are captured**
- **Highlight any significant cross-task or cross-institutional collaboration activities where applicable**
- **Provide graphics, figures, screenshots, maps, charts, or visual outputs where possible**

3.1 Develop Community-Centric and Location-Based Metrics

Task 3 continued advancing development of integrated resilience, risk, and energy justice modeling methodologies designed to support climate-aware community resilience planning and digital twin integration. During Year 2, researchers significantly expanded tract-level socioeconomic and infrastructure risk modeling pipelines through implementation of advanced feature-selection, causal inference, and entropy-weighting methodologies using the mRMR-PCMCI-EWM framework. This data-driven methodology replaced earlier hybrid modeling approaches and established a more robust and interpretable foundation for quantitative resilience and vulnerability assessment aligned with DigiCARES equity and resilience objectives.

EDOCS / Annual Report Submission

About You

Email Address

☐ ORCID

☐ Demographics

☐ Contact Details

People

☒ Participants

☐ Evaluators

☐ Board Members

☐ New Hires

☐ Graduations

Other Users

Teams

Report

☒ Research Themes

☐ Reporting Documents

☐ Grants/Contracts/Proposals

☒ Products

Publications

Presentations

Other Products

☐ Fellowships/Scholarships

☐ Collaborations

☐ Changes/Problems

☐ Submit Report

[Products](#) > [Publications](#) > Add Publication

Product Type *

Select option

Published Status *

☐ Submitted

☐ Published

☐ Rejected

Published Date

☐ Peer Reviewed

URL

Title *

1000 characters remaining

 Contributors * 

 Tags 

Financial Visualization

DREAM-ING OF DASHBOARDS

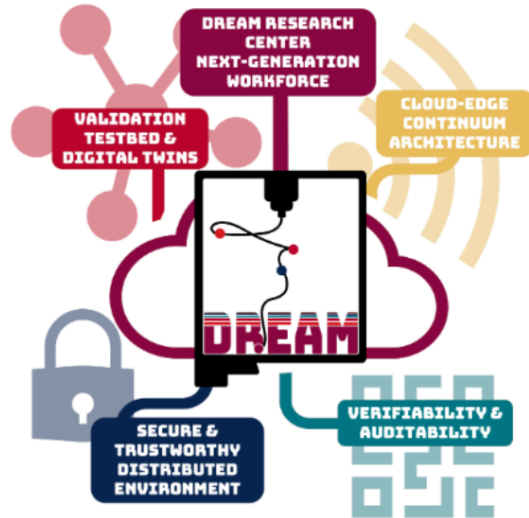
Quick Overview: University Grant Award Finances

Lead institution manages funds, received 2 years at a time

- Budgets submitted along with proposal
 - Per faculty, per year, and per institution
 - Sub-contracts are negotiated with collaborating institutions and paid by processing monthly invoices
- Faculty Indexes created at lead institution
 - Monthly overview reports of each index
- Agency requests break-down of spending by Strategic Goals
 - Faculty responsibility assigned by strategic goals
 - Reported expenditures estimated by indices responsible for strategic goals
 - *EX: Goal 1 = (1.0 x Index A) + (0.5 x Index B) + (0.5 Index C)**

**complexity can scale depending on task assignments, shifts in responsibility, agency requirements*





Budget Allocation
\$3,625,863.00

Y1+2 Total

\$1,829,212.00

Year 1 Allocation

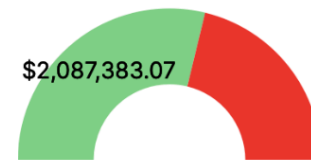
\$1,796,651.00

Year 2 Allocation

Current Month 21

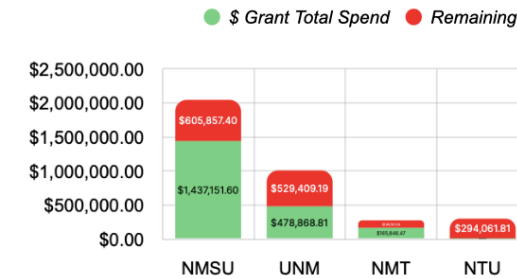
Today 02/05/26

Overall Spending
58%



● \$ Grant Total Spend
● Remaining

Spending by Institution



DREAM Finances Executive Overview

Welcome! The dashboard is designed to:

- Offer a clear and concise overview of budget, expenses, and their variance
- Provide a real-time snapshot of current performance, and shortcuts to real-time mechanisms to submit past, current, or future expenses
- Support better, more informed decisions about how to allocate resources, invest strategically, or cut costs
- Improve control, monitoring, and the long-term growth or sustainability of financial performance

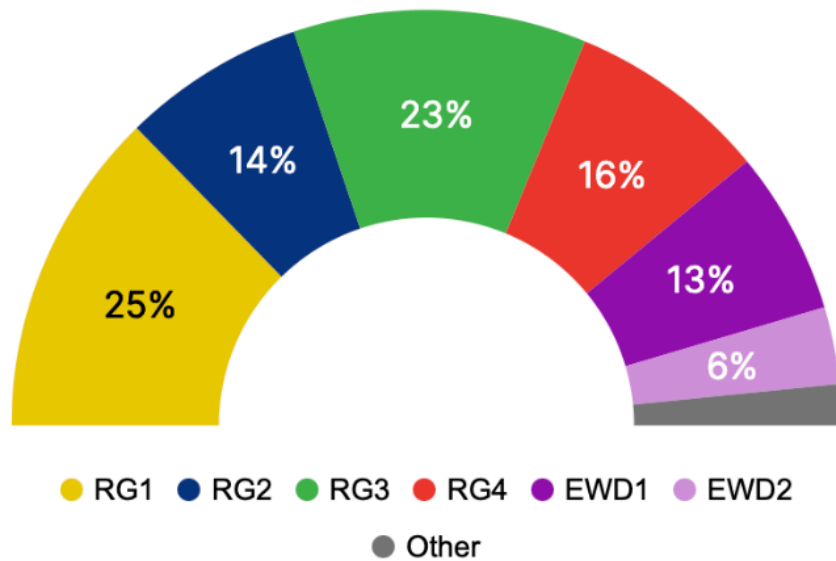
Shortcuts

- [DREAM Website](#)
- [DREAM Budget Burn Rate](#)

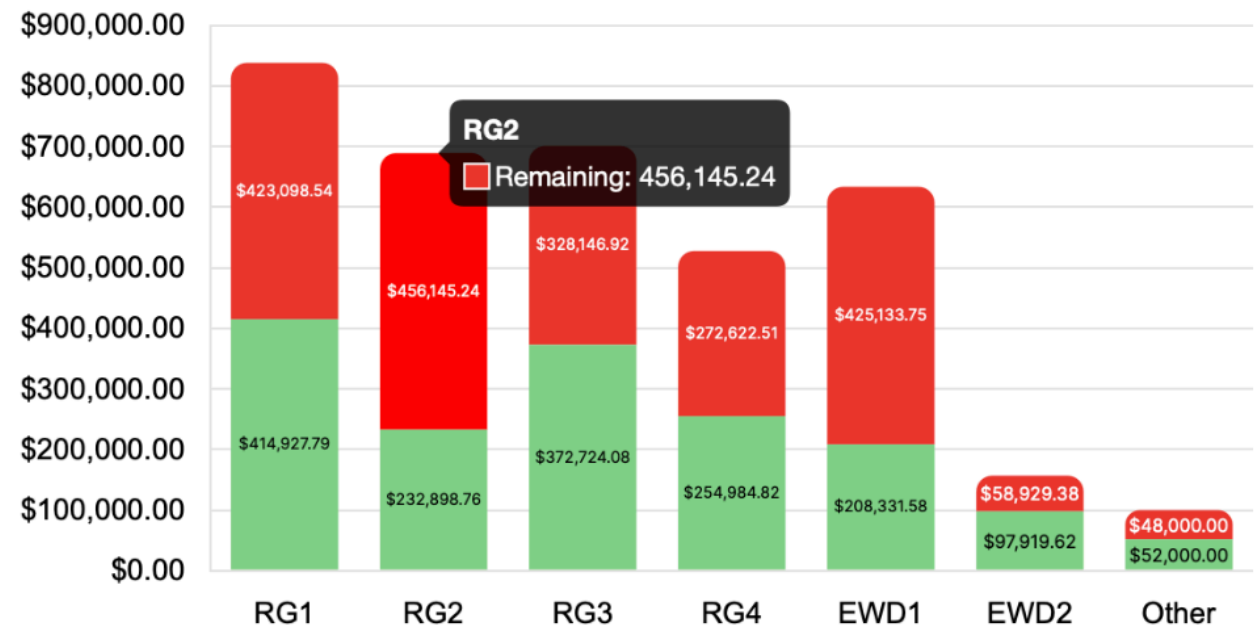
Budget Summary as of:

2/4/2026

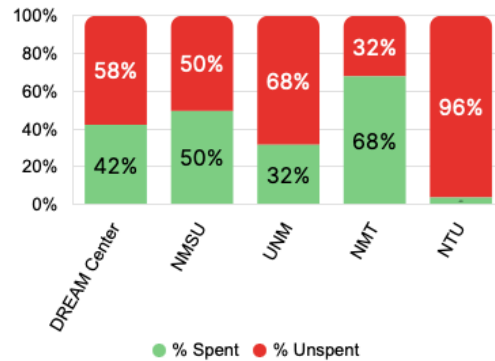
Current Spending % by Goal



Current Spending \$ by Goal



Year 1 Spending %



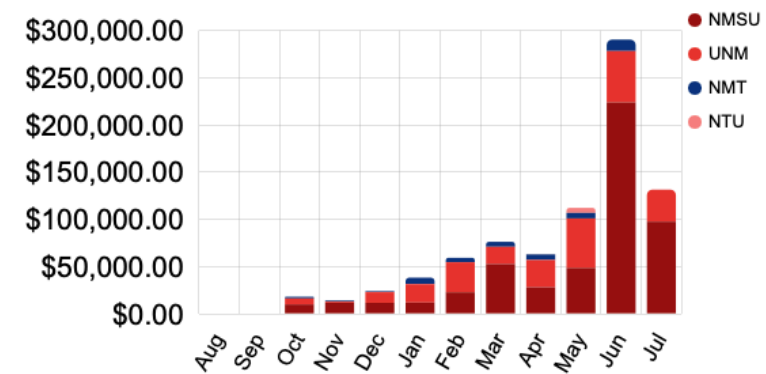
Year 1 Unspent Amount

DREAM	\$1,056,915.61
NMSU	\$531,611.20
UNM	\$339,157.61
NMT	\$41,708.99
NTU	\$144,437.81

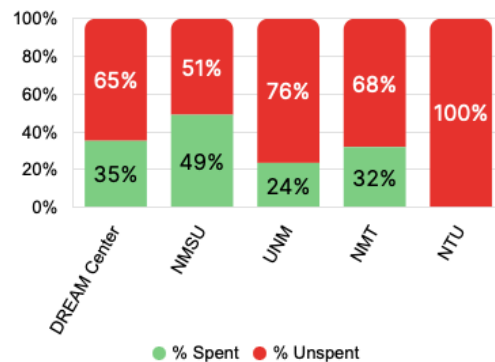
Year 2 Adjusted Allocation

DREAM	\$2,853,566.61
NMSU	\$1,521,165.20
UNM	\$851,449.61
NMT	\$186,889.99
NTU	\$294,061.81

Year 1 Budget Spending



Year 2 Spending %



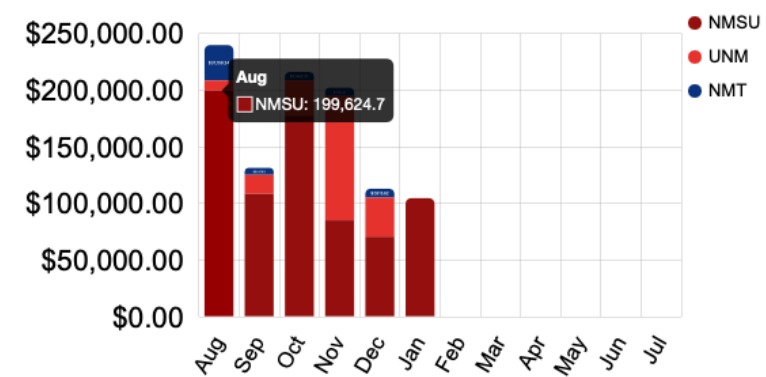
Year 2 Adjusted Allocation

DREAM	\$2,853,566.61
NMSU	\$1,521,165.20
UNM	\$851,449.61
NMT	\$186,889.99
NTU	\$294,061.81

Year 2 Spent Amount

DREAM	\$1,006,571.77
NMSU	\$746,177.72
UNM	\$200,666.65
NMT	\$59,727.40
NTU	\$0.00

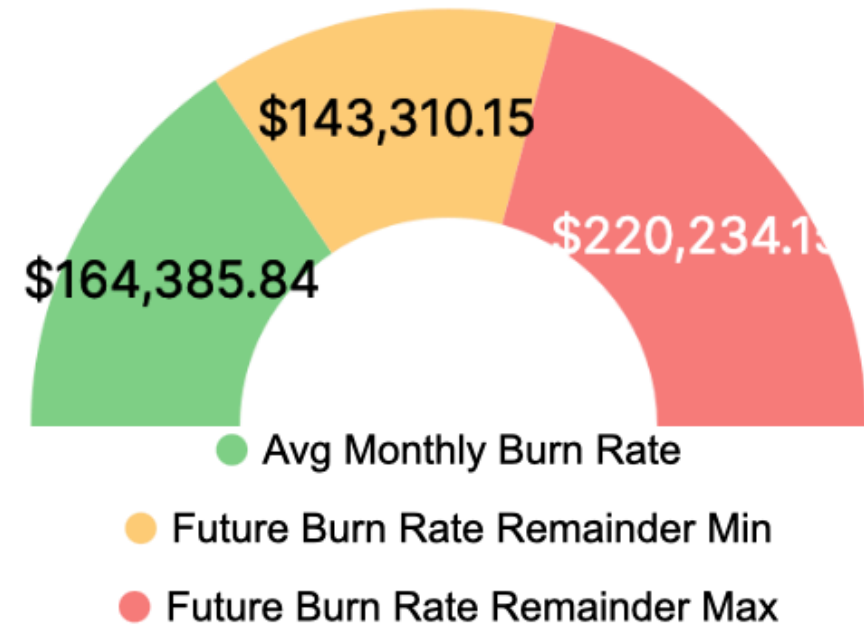
Year 2 Budget Spending



Smartsheet Specifics

- Work needs to be saved manually!
 - Dashboards can be lost if not manually saved
 - Web interface can be laggy
- Calculations need validating in spreadsheet
 - All visualizations needs calculations
 - Equation syntax is new, LLM help on demand
- Intake spreadsheet for compilation
 - Categorization and input is manual, currently
 - Invoices can be attached at each line
- Smartsheet connectivity:
 - Outlook, other native applications
 - Automation dev is a matter of “connecting the wires”

DREAM Budget Burn Rate



CLOSING REMARKS





Key Takeaways

Research grants are projects

-  Federal research awards have scope, timelines, budgets, deliverables, reporting requirements, stakeholders, and closeout activities.

Structure the work before managing the work

-  A WBS translates the research plan into tasks, subtasks, activities, timelines, ownership, and measurable progress.

Continuous data collection reduces reporting burden

-  Forms, logs, trackers, and monthly summaries allow teams to collect information throughout the year instead of reconstructing it at report time.

Smartsheet supports execution and monitoring

-  Sheets, forms, views, automations, attachments, reports, and dashboards can support both day-to-day management and sponsor-facing reporting.

Project data can support both narrative and financial reporting

-  The same structured information that supports annual narratives and EDOCS reporting can also support budget tracking, expenditure visualization, and dashboards.

Limitations

- Not all views automatically save changes
- Occasional platform glitches or formatting resets
- Requires consistent team adoption and compliance
- Reporting processes still depend on timely user input
- Requires knowledge of PM principles



Thank you!

Questions?

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