

How do I obtain a list of my research accounts?

Use the following path from the Main Menu:

Commitment Control > Review Budget Activities > Budgets Overview

The **Find an Existing Value** or **Add a New Value** page appears.

Click the Search button to see a list of pre-defined inquiries.

If a preset inquiry has been set up for you, you should see an Inquiry name listed GLASTNAME (your last name).

Click on the GLASTNAME link to bring up the Budget Inquiry Criteria page.

(If there is not a pre-set inquiry, you can click on the Add a New Value tab to create an inquiry that mirrors the Budget Inquiry Criteria page below).

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Favorites Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Budget Inquiry Criteria

Budget Overview

Inquiry: GRANTLIST Description: Grant List Inquiry

Amount Criteria **Search** Clear Reset

Budget Type

*Business Unit: CLKSN Ledger Group/Set: Ledger Group Ledger Group: GRANTS

View Stat Code Budgets Grant Ledger Group

Display Chart

Time Span

*Type of Calendar: Detail Budget Period

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	GRANTS	NE	ALL	ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Dept	%	%	i		Update/Add
Fund	375	395	i		Update/Add
PIG	%	%	i	SUNII	Update/Add

Budget Status

- Open
- Closed
- Hold

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Click on the circled Search button to get a list of all of your active grants.

A page will be returned that includes one summary line for each of your active grants, including budget, expense total, encumbrance total, pre-encumbrance total and available budget. In addition, the upper portion of the screen includes totals for all grants in the list.

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Home | Add to Favorites

Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

[Return to Criteria](#) Max Rows: 100 [Display Options](#)

Ledger Totals (7 Rows)

		Net Transfers:		0.00
Budget:		1,240,929.00		
Expense:		502,732.54		
Encumbrance:		0.00		
Pre-Encumbrance:		0.00		
Budget Balance:		738,196.46		
Associate Revenue:		0.00		
Available Budget:		738,196.46		

Budget Overview Results [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1-7 of 7](#) | [Last](#)

	Ledger Group	Fund	Dept	Dept Descr	P/G	Project Descr	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*
1	GRANTS	375	10600	Chemical & Biomolecular Eng	32209	Bioelectronic Tongue	ALL	345,485.000	28,848.180	0.000	0.000	316,636.820
2	GRANTS	375	10600	Chemical & Biomolecular Eng	32859	Responsive Nano 17	ALL	165,009.000	166,848.320	0.000	0.000	-1,839.320
3	GRANTS	375	10600	Chemical & Biomolecular Eng	35042	Transdermal Drug	ALL	114,435.000	114,404.710	0.000	0.000	30.290
4	GRANTS	375	10900	Electrical & Computer Eng	35053	PH II Transdermal Drug	ALL	6,000.000	2,596.020	0.000	0.000	3,403.980
5	GRANTS	375	11200	Mechanical & Aeronautical Eng	36106	Bolt Materials	ALL	390,000.000	12,845.610	0.000	0.000	377,154.390
6	GRANTS	378	11200	Mechanical & Aeronautical Eng	40017	NUE Nanotechnology	ALL	41,980.000	15,845.880	0.000	0.000	26,134.120
7	GRANTS	378	11200	Mechanical & Aeronautical Eng	40611	NUE Nanotechnology	ALL	178,020.000	161,343.820	0.000	0.000	16,676.180

[Return to Criteria](#) *Notes

Optional personalizations:

- If you would like to see totals of University provided tuition for graduate students supported under your grant(s), you may replace the fund criteria on the Budget Inquiry Criteria page with %s. Your inquiry will return additional lines, where applicable, of total tuition provided as financial aid for students associated with your grant(s).
- If you would like to see closed grants in addition to those that are active, you may check the check box for Closed in the Budget Status box on the Budget Inquiry Criteria page.

How do I obtain a list of the (account) categories that are available for spending for my research grant?

From the summary list of grants or Budget Overview Results, you can drill to details using the Show Budget Details icon circled below.

Budget Overview Results										Customize Find View All First 1 of 7 Last			
	Ledger Group	Fund	Dept	Dept Descr	P/G	Project Descr	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	
1	GRANTS	375	10600	Chemical & Biomolecular Eng	32209	Bioelectronic Tongue	ALL	345,485.000	28,848.180	0.000	0.000	316,636.820	

This will take you to a summary page for the grant you have selected.

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Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview

Budget Details

Display Chart

Ledger Amounts

Budget:	345,485.00 USD			Max Rows: Attributes Parent / Children Associated Budgets
Expense:	28,848.18 USD			
Encumbrance:	0.00 USD			
Pre-Encumbrance:	0.00 USD			

Associate Revenue: 0.00 USD

Available Budget

Without Tolerance:	316,636.82 USD	Percent:	(91.65%)	Forecasts
With Tolerance:	316,636.82 USD	Percent:	(91.65%)	

Budget Exceptions

Exception Errors: 0 Exception Warnings: 6 [Budget Exceptions](#)

The Parent / Children link will take you to the line item details for your research grant.

The page that is returned shows three lines of the budget with the chartfields.

Parent & Children Budgets

Parent Budget Child Budget Amounts in Base Currency: USD

Children Customize | Find **View All** | First 1-3 of 12 Last

Budget Chartfields Budget Amounts [--->]

	Ledger Group	Fund	Dept	Account	Program	P/G	Budget Period
1	GRANT_DTL	375	10600	2112	211	32209	ALL
2	GRANT_DTL	375	10600	2118	211	32209	ALL
3	GRANT_DTL	375	10600	2198	211	32209	ALL

Click on the Show All Columns icon and View All link to display the entire grant budget in a single screen.

Parent & Children Budgets

Parent Budget Child Budget Amounts in Base Currency: USD


Children Customize | Find | View 3 | First 1-12 of 12 Last

[--->]

	Ledger Group	Fund	Dept	Account	Program	P/G	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget	Percent
1	GRANT_DTL	375	10600	2112	211	32209	ALL	55,084.00	12,093.32	0.00	0.00	42,990.68	78.05
2	GRANT_DTL	375	10600	2118	211	32209	ALL	100,375.00	2,369.22	0.00	0.00	98,005.78	97.64
3	GRANT_DTL	375	10600	2198	211	32209	ALL	4,214.00	925.14	0.00	0.00	3,288.86	78.05
4	GRANT_DTL	375	10600	2340	211	32209	ALL	0.00	196.14	0.00	0.00	-196.14	0.00
5	GRANT_DTL	375	10600	2440	211	32209	ALL	22,886.00	3,126.81	0.00	0.00	19,759.19	86.34
6	GRANT_DTL	375	10600	2510	211	32209	ALL	0.00	33.00	0.00	0.00	-33.00	0.00
7	GRANT_DTL	375	10600	2556	211	32209	ALL	99,091.00	9,869.11	0.00	0.00	89,221.89	90.04
8	GRANT_DTL	375	10600	2586	211	32209	ALL	0.00	91.50	0.00	0.00	-91.50	0.00
9	GRANT_DTL	375	10600	2614	211	32209	ALL	2,000.00	0.00	0.00	0.00	2,000.00	100.00
10	GRANT_DTL	375	10600	2654	211	32209	ALL	6,000.00	143.94	0.00	0.00	5,856.06	97.60
11	GRANT_DTL	375	10600	2734	211	32209	ALL	52,835.00	0.00	0.00	0.00	52,835.00	100.00
12	GRANT_DTL	375	10600	2944	211	32209	ALL	3,000.00	0.00	0.00	0.00	3,000.00	100.00

8/9/11 – Note that based upon user requests – IT has been asked to insert descriptions for each of the account codes into this screen.

How do I obtain a list of the expenditures within a specific account line item within one of my grants?

You may drill to expenditure detail from any of the numbers that are displayed by clicking on the View Related Links icon . This brings up a page which gives the option to Drill to Ledger or Drill to Activity Log.


























Please select one of the following links:

[Drill to Ledger](#)
[Drill to Activity Log](#)

Select the Drill to Activity Log link to see all journals for that specific account line (example below is circled account 2440 Research Supplies).

Activity Log

Ledger: GR_DTL_EXP

Activity Log												Customize	Find	View All		First	1-12 of 12	Last
Tran Line	Document Label	Document ID	Document Description	Ref Bdgt?	Fund	Dept	Account	Program	P/G	Budget Period								
		1022	Journal ID: 0000227847	MC 04/07/11 PLN*PRICELINE.COM	N	375	10600	2440	211	32209	ALL							
		1021	Journal ID: 0000227847	MC 03/30/11 THE ELECTROCHEMICA	N	375	10600	2440	211	32209	ALL							
		449	Journal ID: 0000229814	MC 06/21/11 ABBIOTEC, LLC	N	375	10600	2440	211	32209	ALL							
		450	Journal ID: 0000229814	MC 06/21/11 ABBIOTEC, LLC	N	375	10600	2440	211	32209	ALL							
		447	Journal ID: 0000229814	MC 06/08/11 VWR INTERNATIONAL	N	375	10600	2440	211	32209	ALL							
		1069	Journal ID: 0000229814	MC 06/21/11 EVANS & WHITE ACE	N	375	10600	2440	211	32209	ALL							
		1068	Journal ID: 0000229814	MC 06/21/11 SIGMA ALDRICH US	N	375	10600	2440	211	32209	ALL							
		441	Journal ID: 0000229814	MC 05/29/11 PIERCE 0300	N	375	10600	2440	211	32209	ALL							
		442	Journal ID: 0000229814	MC 05/30/11 VWR INTERNATIONAL	N	375	10600	2440	211	32209	ALL							
		440	Journal ID: 0000229814	MC 05/26/11 UNIVERSITYWAFER.CO	N	375	10600	2440	211	32209	ALL							
		444	Journal ID: 0000229814	MC 06/02/11 WWW.NEWEGG.COM	N	375	10600	2440	211	32209	ALL							
		443	Journal ID: 0000229814	MC 06/01/11 INDOOR BIOTECHNOLO	N	375	10600	2440	211	32209	ALL							

Note that any of the information that is returned in the form of a grid may be downloaded to Excel by clicking on the grid Download icon circled above.