

Search for “qlik” (pronounced “click”) on the William and Mary webpage

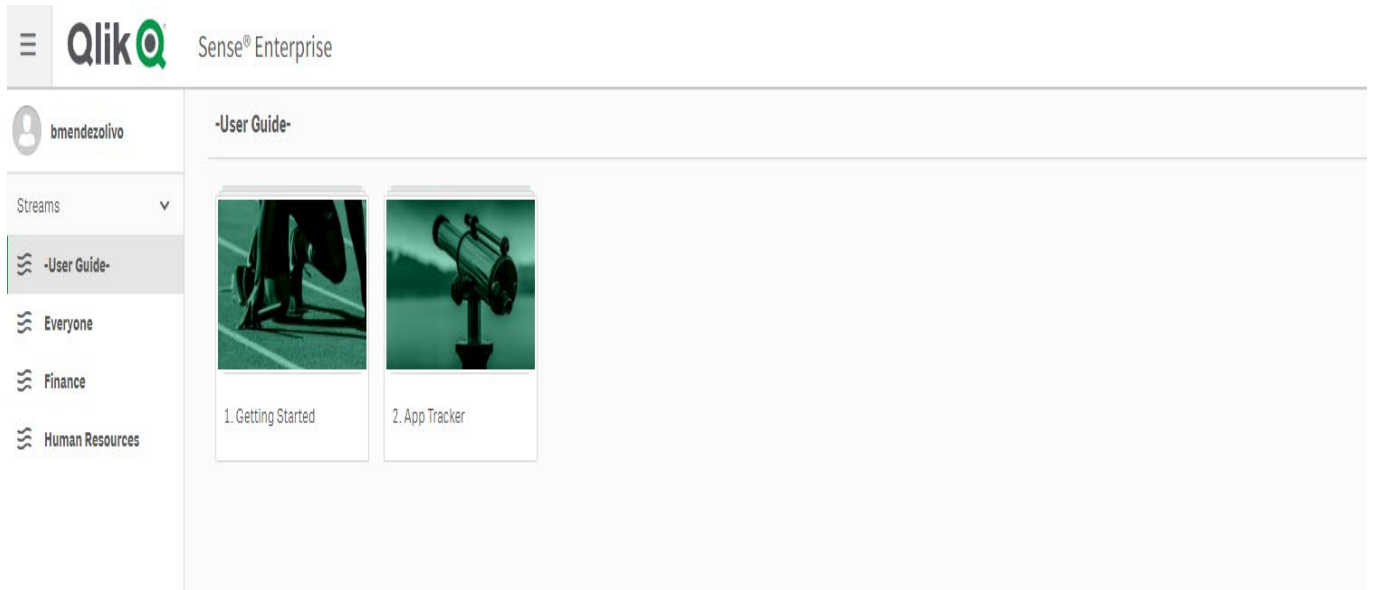
The screenshot shows the William & Mary website's search results for the term "qlik". At the top left is the William & Mary logo with the text "WILLIAM & MARY CHARTERED 1693". Below the logo is a navigation menu with items: "The W&M Difference", "W&M at a Glance", "W&M in Pictures", "W&M in 30 Videos", "W&M Rankings", "Administration", "History & Traditions", and "Visiting Campus". The search results area shows the breadcrumb "Home / About W&M / Search" and the heading "Search W&M". A search bar contains the text "qlik" and a magnifying glass icon. Below the search bar, it says "About 56 results (0.17 seconds)". The first result is titled "Data Self-Service | William & Mary" and the text below it reads: "Qlik Sense is the specific product we use to combine, analyze, and visualize institutional data. Qlik Sense can easily extract and merge data from multiple ...".

Click on “Data Self-Service/William & Mary”

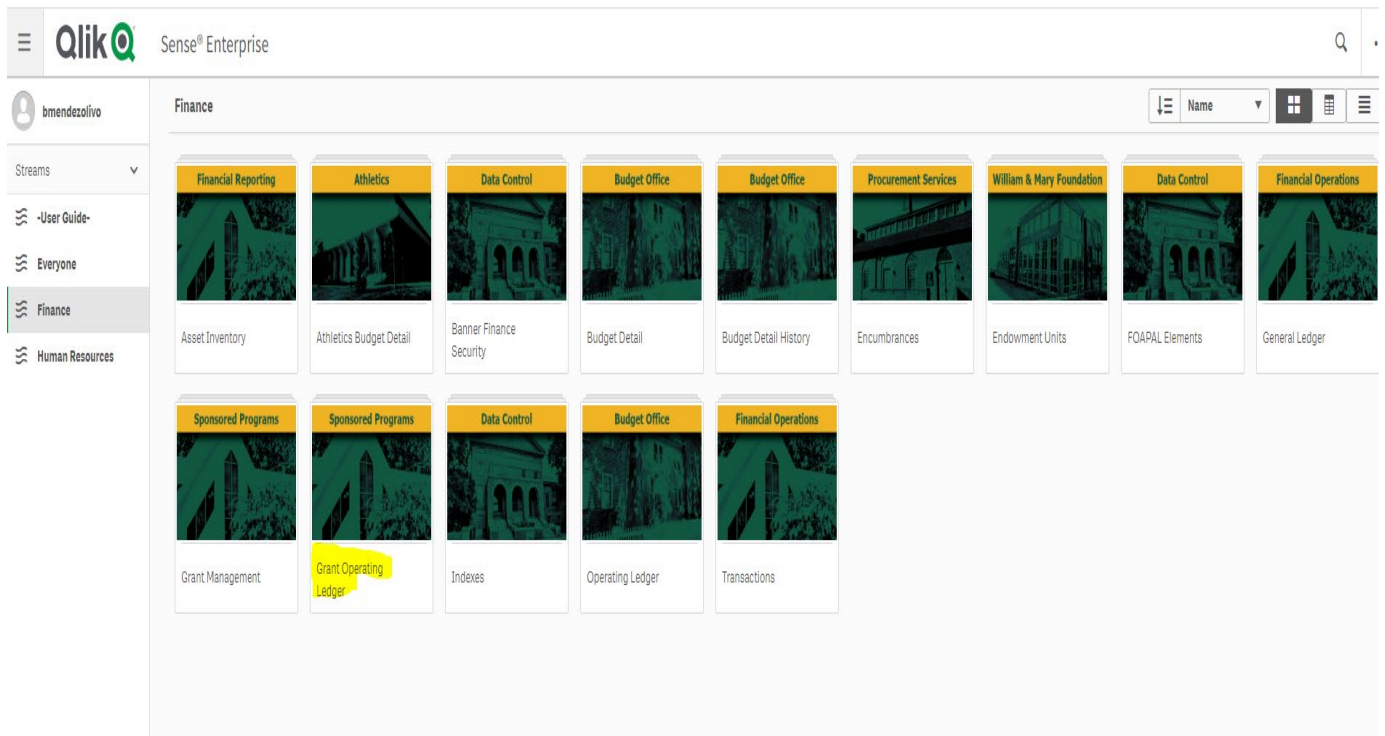
The screenshot shows the William & Mary website's "Data Self-Service" page. At the top left is the William & Mary logo with the text "WILLIAM & MARY CHARTERED 1693". Below the logo is a navigation menu with items: "DATA", "Data @ W&M", "Data Self-Service" (highlighted), "Training", and "Fact Book". Below the menu are social media icons for Facebook, Twitter, LinkedIn, Instagram, and a calendar icon. A search bar at the bottom left says "search this site". The main content area shows the breadcrumb "Departments & Offices / ... / Data / Data Self-Service" and the heading "Data Self-Service". Below the heading is the sub-heading "Qlik - W&M's data discovery tool". The text below reads: "To meet the diverse and extensive reporting needs of the university, William & Mary uses Qlik (pronounced 'Click'), a data discovery tool, to ensure effective and efficient decisions. Qlik Sense is the specific product we use to combine, analyze, and visualize institutional data." Below this is another paragraph: "Qlik Sense can easily extract and merge data from multiple sources, bridging gaps that previously required manual and inefficient processes. Users can search and filter data to generate an endless variety of result sets to quickly identify trends, anomalies, and aggregations vital to their day-to-day decisions. Qlik Sense supports an assortment of visualizations, including tables, bar charts, pivot tables, line charts, gauges, maps, KPIs, and many more!". Below the text is a green button that says "VISIT QLIK (QLIK.WM.EDU)". Below the button is a hint: "\*Hint: don't download to Excel for formatting, use Qlik visualization." At the bottom of the page is a screenshot of a Qlik Sense dashboard showing various data visualizations, including a large number "683", a pie chart, and several bar charts.

“Click on Visit Qlik (Qlik.WM.EDU)”

As PI, you should have access to the Finance Module. Click on “Finance”



Click on “Grant Operating Ledger”



## Click on “Grant Billing Summary”

The screenshot shows the 'Grant Operating Ledger' dashboard. At the top, there is a navigation bar with 'Grant Operating Ledger', 'Analyze Sheet', and 'Narrate Storytelling'. Below this is a header section for 'Sponsored Programs' with a description of the ledger and its data. The main area displays four public sheets: 'Grant Billing Summary' (highlighted in yellow), 'Monthly Category Expenditures', 'Grant Billing Categories', and 'Open App Copy'.

Click on “Start Month” and Select “first month Current FY”. Example “JUL 2022”

Click on “End Month” and Select “current month and year”. Example “OCT 2022”

Click on “Chart” and Select “W”

Click on “Grant” and enter your grant #. It should be the original grant #.

If you have additional extensions to your grant with additional numbers (e.g., for the next multiple rounds of funding for the same grant), then you will add that number under FUND.

See the balance as of the month you selected. You can download the file in PDF or Excel. Right Click on the cell on top of your grant number and select download as PDF or Data (for excel).

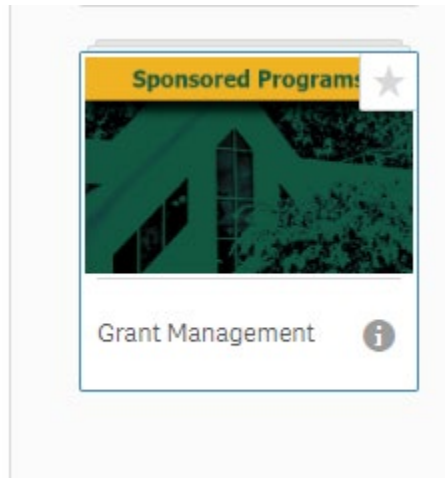
The screenshot shows the 'Grant Billing Summary' application interface. It includes a top navigation bar with 'Grant Operating Ledger', 'Analyze Sheet', and 'Narrate Storytelling'. Below this is a filter bar with 'Start Month Year', 'End Month Year', 'Chart Code', 'Grant', 'Fund', and 'Organization'. There are buttons for 'Summarize by Fund' and 'Include Match Funds'. The main area displays a 'Grant Summary' table for grant 715601. The table has columns for 'Grant', 'PI Name', 'Responsible Org', 'Billing Category', and 'Values'. The 'Values' column is further divided into 'Budget as of Jun 2023', 'Apr 2016 - Jun 2023 Expenditures', 'Expenditures as of Jun 2023', and 'Balance as of Jun 2023'. The table lists various billing categories such as Salary, Fringe Benefits, Travel, Supplies, Contractual Services, Tuition, Equipment, and Facilities and Administrative Costs.

Grant	PI Name	Responsible Org	Billing Category	Values			
				Budget as of Jun 2023	Apr 2016 - Jun 2023 Expenditures	Expenditures as of Jun 2023	Balance as of Jun 2023
715601   Precision Studies of Neutrino Oscil	Nelson, Jeffrey K.	Gregory	Total of Billing Categories				
			Salary				
			Fringe Benefits				
			Travel				
			Supplies				
			Contractual Services				
			Tuition				
			Equipment				
			Facilities and Administrative Costs				

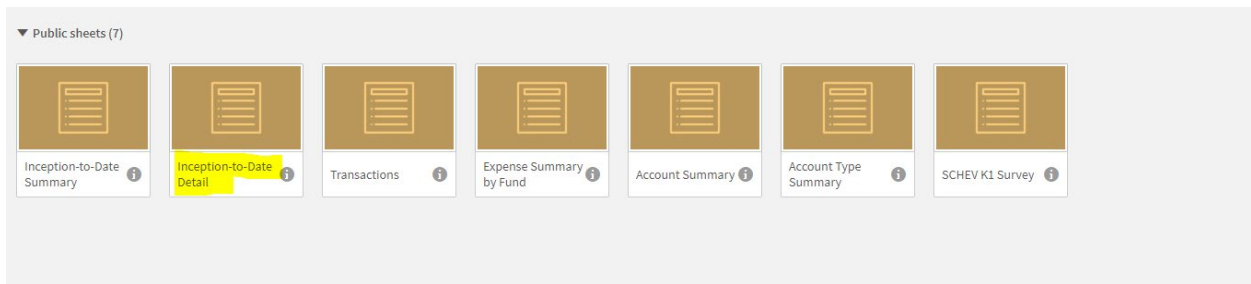
# To Review your ORF

Click on "Finance"

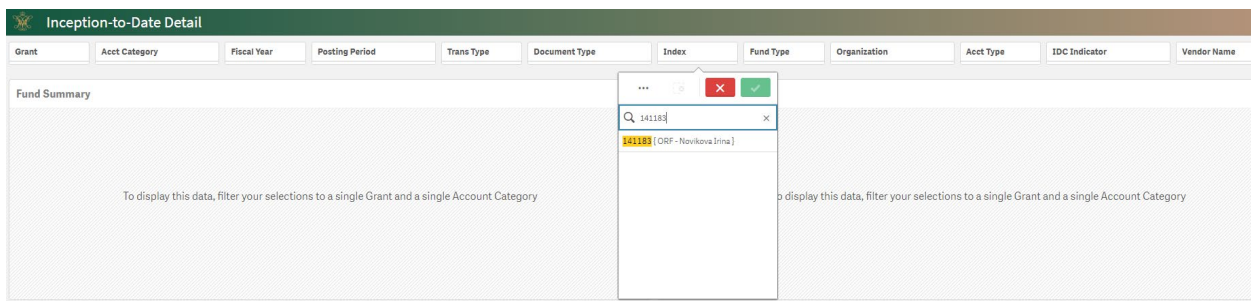
Click on the Grant Management Tile



click the "Inception to Date Detail" tile



Click on Index and type your ORF Index



Select the following on the top bar

Index- select from the drop down the index **(if you do not know your ORF index type your name and the select the one beginning with 14).**

Acct Cat- expense

**The Net amount is your current balance**