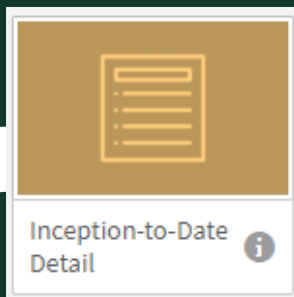
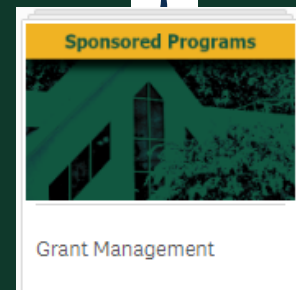


Where do I find a grant's overall balance?

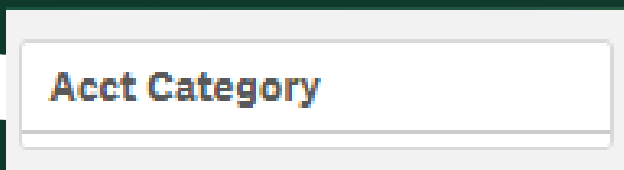
1 "Grant Management" tile

From the Finance Stream in Qlik, navigate to the "Grant Management" tile (middle row, right side)



2 "Inception-to-Date Detail" Sheet

Within the Grant Management tile, navigate to the "Inception-to-Date Detail" sheet (2nd from the left).



3 Account Category

In the upper right side, there is a filter labeled "Acct Category." Select "Expense" and click the green check to confirm.



4

If you know the Grant code or name...

use the magnifying glass next to the "Grant" column to search for and select it

If you know the PI (faculty member)...

use the "PI" filter in the upper right to find all of their grants. If they have multiple, you can use the "Grant" magnifying glass to narrow it down.

Budget	Activity	Commitments	Net Amount
Budget	Activity	Commitments	Available

5 Available or Net Amount

In any of the 3 reports on the page, the far right column will be named "Available" or "Net Amount." This will be your current balance, including any encumbrances.

6 For more details...

Fund Summary: 701551 { NASA-Nonlinear 8/04 }
Principal Investigator: Rahman, Zia-Ur { 3/1/2001 - 8/31/2004 }

The **Fund Summary** (upper left) gives a quick look at the total amount spent, available, and "committed" (a.k.a. encumbered)

Account Summary: 701551 { NASA-Nonlinear 8/04 }
Principal Investigator: Rahman, Zia-Ur { 3/1/2001 - 8/31/2004 }

The **Account Summary** (upper right) gives a general breakdown of budgets and activity by spending categories

Transaction Detail: 701551 { NASA-Nonlinear 8/04 }
Principal Investigator: Rahman, Zia-Ur { 3/1/2001 - 8/31/2004 }

The **Transaction Detail** report (bottom half of the page) gives a detailed list of all of the transactions in the grant.