

Running a Grant Summary for your Faculty or Department using FAST

- Step-by-step instructions for using Financial Services' FAST Research Administration system.
- **Audience:** Deans, Directors, Chairs or Departmental Administrators
- www.carleton.ca/financialservices/research-accounting/administrators/fast-research/

Follow the steps outlined in this handout to run a Grant Summary Report for your faculty or department.

- Access to this report can be set up for any Dean, Director, Chair or Departmental Administrator through Research Accounting (accounting@carleton.ca). The individual must first have signing authority over a departmental Organization Code (Org) or faculty level Org.
- URL: www.carleton.ca/fast
- Credentials: Please use your Banner or MyCarletonOne username and password to login. Note these passwords may be different if you have not synchronized your services through MyCarletonOne. If your MyCarletonOne and Banner credentials are different, your Banner credentials should be used for logging into FAST.

Step 1: Login to the FAST Portal.

https://fast.carleton.ca/FASTPORTAL/Login.aspx

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Sign In to **FAST**

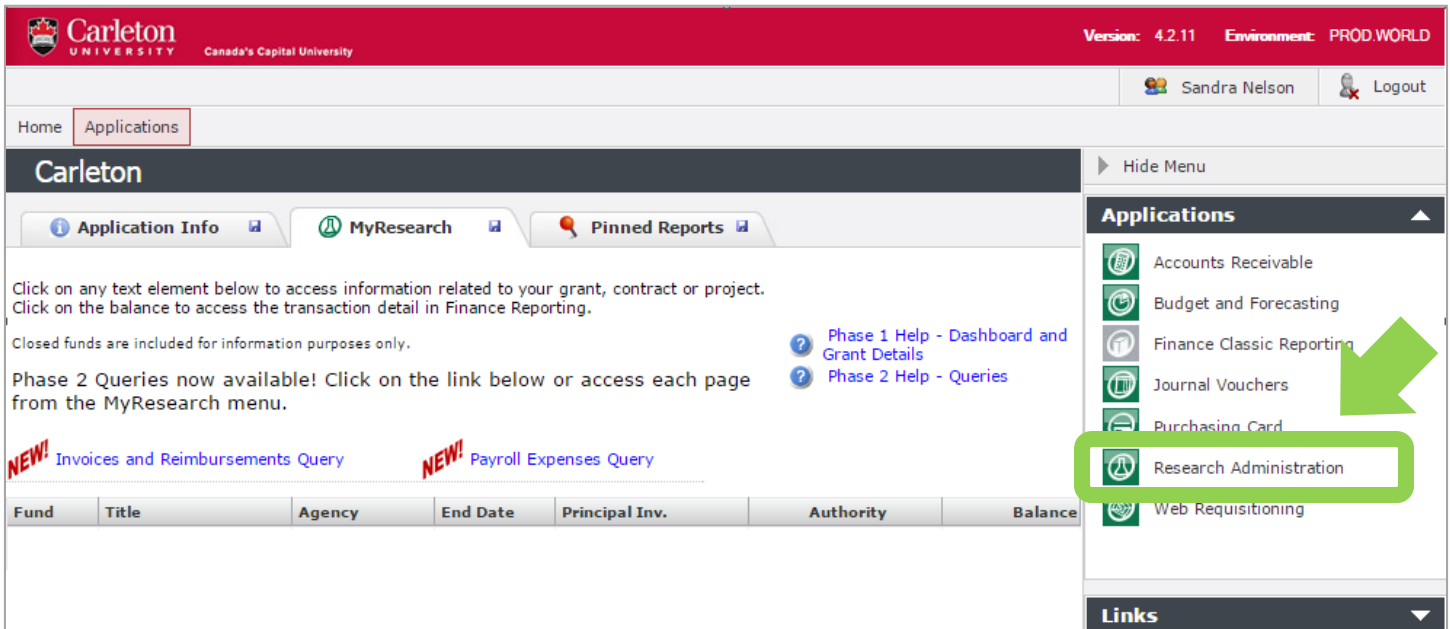
Carleton UNIVERSITY

User Name :

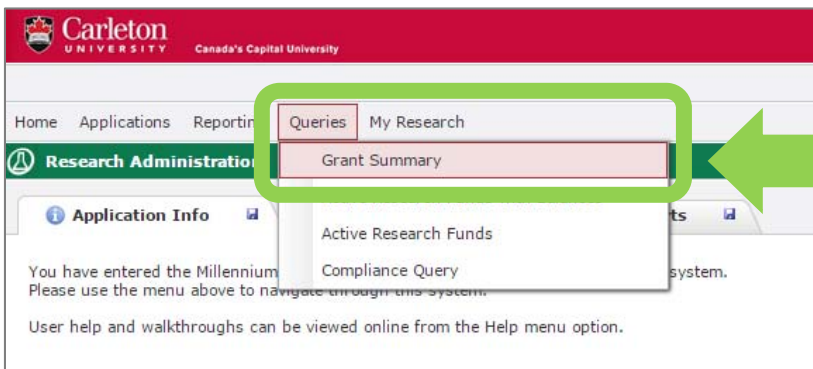
Password :

Sign In

Step 2: Once you have logged into FAST, you will land on the MyResearch dashboard or the Application Information landing page. From the **Applications** menu on the right hand side of your screen, click on **Research Administration**.



Step 3: Select the **Grant Summary** option under the **Queries** menu item once inside the **Research Administration** application.



Step 4a: To quickly generate a report of current balances, click on the **Execute Report** button. This will produce an onscreen report of all of the grants and contracts that relate to your financial security profile for the current month in a new tab called **Report Results**.

Step 4b (optional): There are filters available to refine your report. To navigate back to refine your filters, click on the filter options tab, fill in the filters you want to use, and click **Execute Report** again.

The screenshot shows the 'Filter Options' tab in the Research Administration system. The page is titled 'Grant Summary' and 'View grants at a summary level'. The 'Filter Options' tab is active, and the 'Departments' filter is highlighted with a green box. The 'Complete' filter is set to 'Not' and the 'Starting Period' filter is set to 'JUN-2015'. The 'Ending Period' filter is also set to 'JUN-2015'. A green arrow points to the 'Filter Options' tab, and another green arrow points to the 'Execute Report' button.

**Depending on your screen resolution, the filter page may appear differently than the above picture.*

Here are some quick tips on the most commonly used filters.

Department: The report will automatically know which departments you have access to view. You only need to fill in a department filter if you have access to more than one department and would like to narrow your search.

Complete: The default is set to display all grants and contracts that have 'Not' completed the closing process in Research Accounting. If you also wish to review historical records, change this filter to 'All' (for both active and complete) or 'Complete' (for only completed).

Starting Period: This field is automatically set to the beginning of the current month. To view activity for the whole year-to-date, change this field to:

- April of the current year for the research fiscal year, or
- May for the University fiscal year.

Ending Period: This field is automatically set to the current month. Unless you are looking for historical data, you will not normally need to change this field.

Step 5a: Review the Output.

Each record in the output represents a high level overview of a contract or grant, including:

- the opening balance based on the starting period, and
- the closing balance as of the ending period.

The name of the current Fund Administrator in Research Accounting is included in a column of the report in case you have any questions about a specific record.

Note that a full listing of the report column definitions is provided at the **bottom** of the **Filter Options** tab in the **Page Notes** section.

Step 5b (optional): You may choose to download the report to Excel, PDF or XML using the icons in the bottom right corner of the Report Results tab.

