FAST MyResearch How-To Sheets

11. Running a grant summary for a Faculty or Department using FAST

This how-to sheet outlines the steps to:

- Run a 'Grant Summary Report' for a faculty or department.

Who is the audience for this how-to sheet?

- Research Financial Services (accounting@carleton.ca) can grant Deans, Directors, Chairs, or Departmental Administrators access to this report.
- If the report does not run, contact accounting@carleton.ca.

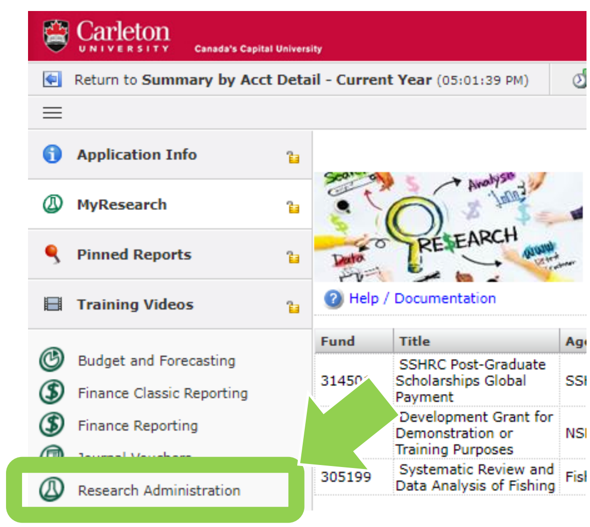
What is a 'Grant Summary Report'?

- A report with current balances for all research grants, contracts, enterprise, and Professional Expense Reimbursement (PER) Funds for the viewers' Org codes.

December 2019

STEPS

1 From the landing page, click on 'Research Administration' in the menu.

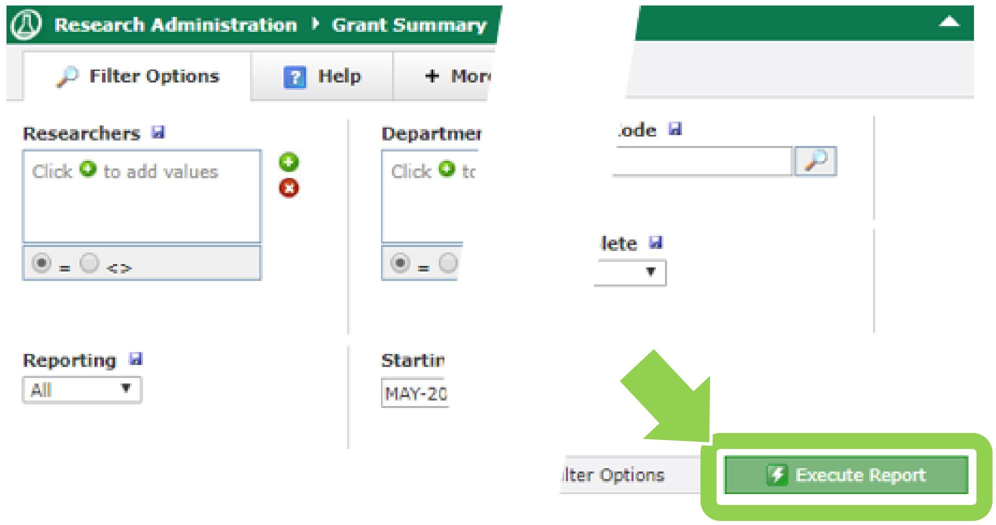


2 From the new screen, click on the 'Queries' button.

From the dropdown menu that appears, click on 'Grant Summary'.

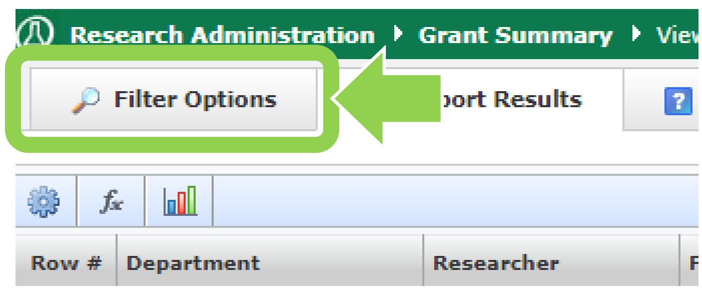
3a Option A: Generate a generic ‘Grant Summary Report’.

Click on the green ‘Execute Report’ button to generate a report of current balances for all research grants, contracts, enterprise, and Professional Expense Reimbursement (PER) Funds.



3b Option B: Use filters to generate a refined ‘Grant Summary Report’.

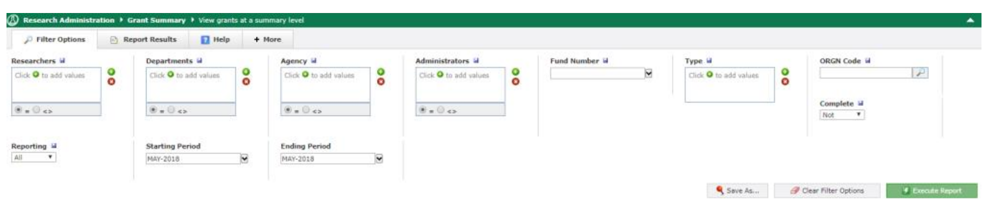
NOTE: If you clicked on the ‘Execute Report’ button in the previous step, you will need to click on the ‘Filter Options’ tab to return to the filter options.



4 There are many filters available to refine the report.

In the following steps, we’ll review the most commonly used filters:

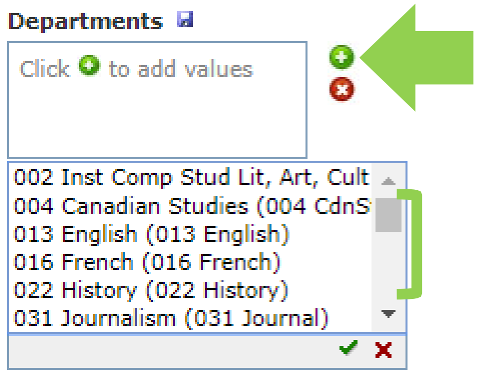
- department
- complete
- starting period
- ending period



5 To add a department to the ‘Department’ filter:

1. Click on the green ‘+’ button to the right of the ‘Departments’ field.
2. From the drop down menu, use the scrollbar to find the department and double click on it.

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



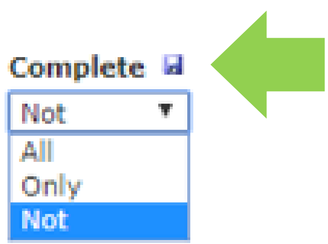
6 The ‘Complete’ filter default is ‘Not’. The default, ‘Not’, will display all Funds that are currently open.

To display closed Funds,

- click on the ‘dropdown arrow‘ button
- click on ‘Only’

To display both open and closed Funds,

- click on the ‘dropdown arrow‘ button
- click on ‘All’



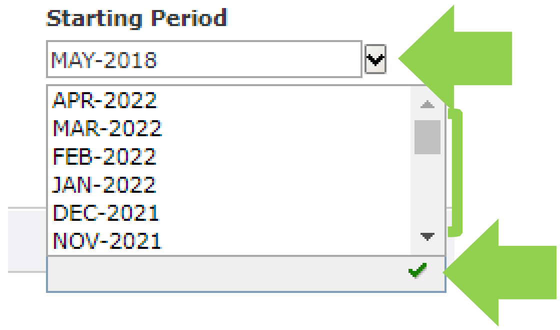
7 The ‘Starting Period’ filter default is the current month.

TIP: Other dates you may want to choose:

- April of the current year for the government’s fiscal year
- May of the current year for Carleton’s fiscal year

To add a starting period to the ‘Starting Period’ filter:

- click on the ‘dropdown arrow’ button
- from the dropdown menu, use the scrollbar to find the month/year you are requesting data and click on it
- click on the green ‘checkmark’ button to confirm your selection

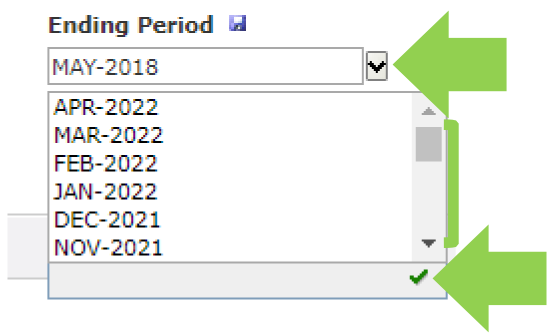


8 The ‘Ending Period’ filter default is the current month.

NOTE: This field is automatically set to the current month. Only change the default to view historical data.

To add an ending period to the ‘Ending Period’ filter:

- click on the ‘drop down arrow’ button
- from the drop down menu, use the scrollbar to find the month/year you are requesting data and click on it
- click on the green ‘checkmark’ button to confirm your selection

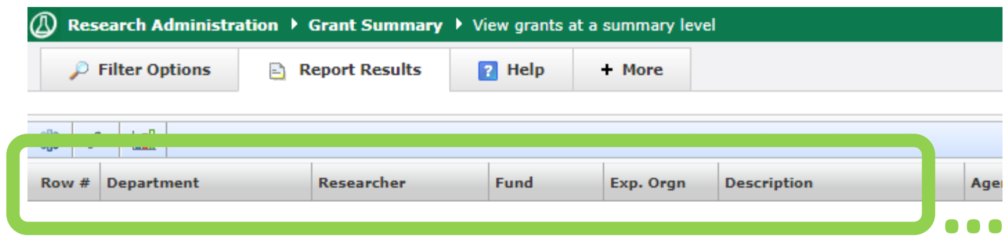


9 Click on the green ‘Execute Report’ button located on the far right of the screen.

The data will be displayed in the ‘Report Results’ tab based on the filter options.

10 Each record in the report represents a high level overview for Funds, including:

- start date
- end date
- current fund balance



11 You can choose to download the report to Excel, PDF, or XML using the icons in the bottom right corner of the screen.

What next?

- Visit the [FACTS’ MyResearch tools and support page] to find more how-to sheets.