

# FAST MyResearch How-To Sheets

## 4. How can I find basic information about my Funds?

### This how-to sheet describes:

- The information found in each of the table's columns on the MyResearch landing page.
- The table on the landing page contains a full list of the research grants, contracts, enterprise, and Professional Expense Reimbursement (PER) Funds.

December 2019

### STEPS

1. The MyResearch landing page shows a complete list of Funds the viewer can access.

Click on any text element below to access information related to your grant, contract or project. Click on the balance to access the transaction detail in Finance Reporting. Closed funds are included for information purposes only.

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
| 314501 | SSHRC Post-Graduate Scholarships Global Payment          | SSHRC    | N/A         | Laura Landriault                        | Both Posting and Query | 14,567.79 |
| 319999 | Development Grant for Demonstration or Training Purposes | NSERC    | 31-MAR-2024 | Laura Landriault                        | Both Posting and Query | 19,000.00 |
| 305199 | Systematic Review and Data Analysis of Fishing           | Fish Can | 31-MAR-2020 | Office of VP Research and International | Query                  | 30,000.00 |

2. The first column, 'Fund', has the Fund number. Each individual agreement has a separate Fund.

To view details governing a Fund, click on a Fund number (see how-to sheet '5' for more information).

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
| 314501 | SSHRC Post-Graduate Scholarships Global Payment          | SSHRC    | N/A         | Laura Landriault                        | Both Posting and Query | 14,567.79 |
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3. The second column, 'Title', shows the name of the research grant, contract, enterprise, or Professional Expense Reimbursement (PER) Fund.

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
| 314501 | SSHRC Post-Graduate Scholarships Global Payment          | SSHRC    | N/A         | Laura Landriault                        | Both Posting and Query | 14,567.79 |
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4. The third column, 'Agency', shows the name or acronym of the funding agency.

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
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5. If applicable, the fourth column, 'End Date', contains the date the funding ends.

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
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6. The fifth column, 'Principal Inv.', shows the name of the Principal Investigator.

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
| 314501 | SSHRC Post-Graduate Scholarships Global Payment          | SSHRC    | N/A         | Laura Landriault                        | Both Posting and Query | 14,567.79 |
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7 The sixth column, 'Authority', shows the level of financial authority the viewer has over the Fund.

**What do these terms mean?**

- **'Posting'**: Allows viewer to charge expenses to a Fund using Carleton's financial information systems (i.e. eShop, Travel and Expense Reimbursement, and Pcard).
- **'Query'**: Allows viewer to view financial information.
- **'Both Posting and Query'**: Provides viewer full financial authority.

Your assigned financial administrator in Research Financial Services can provide further explanation.

| Fund   | Title  | Agency   | End Date    | Principal Inv.                          | Authority              | Balance   |
|--------|--|----------|-------------|---|------------------------|-----------|
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8 The seventh column, 'Balance', shows the balance in a Fund.

**What do the colours mean?**

- If the balance is green, more than 10% of the budget remains
- If the balance is yellow, less than 10% of the budget remains
- If the balance is red, the Fund is overspent

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**What next?**

- Visit the [FACTS' MyResearch tools and support page](#) to find more how-to sheets.
- Questions about the system? Email [financial.systems@carleton.ca](mailto:financial.systems@carleton.ca).