FAST MyResearch How-To Sheets

6. How do I find financial summary information for a Fund?

This how-to sheet outlines the steps required to:
- Find financial summary information for a particular Fund

**December 2019**

**STEPS**

1. From the MyResearch landing page, click on any Fund number listed.

2. From the page that opens, click on either the ‘Available Balance’ field OR the ‘View Financial Details’ button to view related financial summary information.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Title</th>
<th>Agency</th>
<th>End Date</th>
<th>Principal Inv.</th>
<th>Authority</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>314501</td>
<td>SSHRC Post-Graduate Scholarships Global Payment</td>
<td>SSHRC</td>
<td>N/A</td>
<td>Laura Landrault</td>
<td>Both Posting and Query</td>
<td>14,567.79</td>
</tr>
<tr>
<td>319999</td>
<td>Development Grant for Demonstration or Training Purposes</td>
<td>NSERC</td>
<td>31-MAR-2024</td>
<td>Laura Landrault</td>
<td>Both Posting and Query</td>
<td>19,000.00</td>
</tr>
<tr>
<td>305199</td>
<td>Systematic Review and Data Analysis of Fishing</td>
<td>Office of VP Research and International</td>
<td>31-MAR-2024</td>
<td></td>
<td>Query</td>
<td>30,000.00</td>
</tr>
</tbody>
</table>
3. In the page that opens, the Fund’s expenses for Carleton’s current fiscal year (i.e. May to current date) will be displayed.

   a. To view data for an alternate time period, click the ‘dropdown arrow’ for options.

   Click an option to select it from the drop down menu.

   b. The second column, ‘Title’, shows the type of expenses charged to the Fund.

   c. The sixth column, ‘YTD Actual’, shows expenses charged against the Fund for the current fiscal year (beginning May).

   d. The seventh column, ‘O/S Commitments’, shows committed expenses, to be paid.

   e. The ‘Closing Fund Balance’ is the budget available to spend, after any outstanding commitments have been deducted.

4. To return to the MyResearch landing page, click on the ‘Home’ button.

What next?
- Visit the FACTS’ MyResearch tools and support page to find more how-to sheets.