

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.

September 2024

STEPS

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

Carleton UNIVERSITY Canada's Capital University

Application Info MyResearch Pinned Reports Training Videos Budget and Forecasting Finance C Finance R Journal Vouchers Research Administration

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

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.

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).

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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
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4. The third column, 'Agency', shows the name or acronym of the funding agency.

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5. If applicable, the fourth column, 'End Date', contains the date the funding ends.

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6. The fifth column, 'Principal Inv.', shows the name of the Principal Investigator.

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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.

The Financial Analyst in Research Financial Services assigned to the Fund can provide further explanation.

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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.