

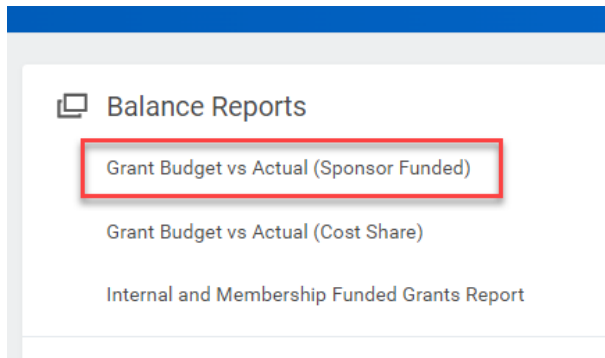
Looking up your grant balances:

Step 1: Click on the “Grants Management” icon

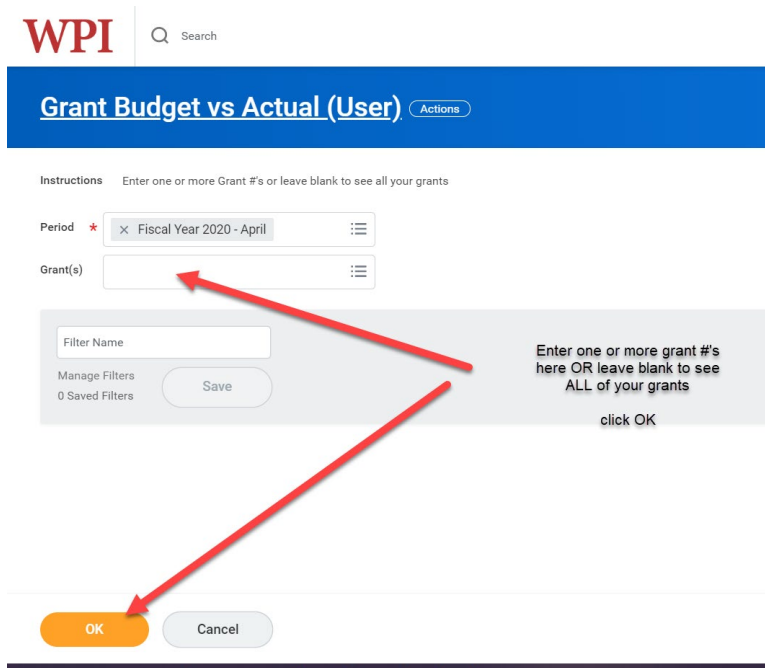


Grants
Management

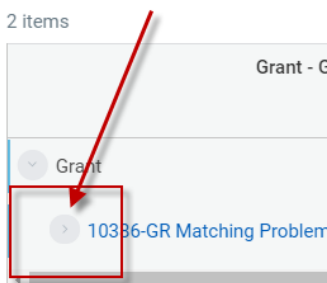
Step 2: Click the report called “Grant Budget vs Actual (User)”



Step 3: Press OK! You can leave the grant prompt field blank to get all, or you can enter one or more grant numbers.



Once you see the list of your grants, click the arrow button on the left you can expand to view by budget category.



Click on any blue numbers to drill down for add'l info.

Grant Budget vs Actual (Sponsor Funded) 9/6/2022

Period Fiscal Year 2023 - July Grant(s) Grant: 1015

1. Click arrow left of grant # to expand

click total in actuals column to see ALL transactions

click any blue number in actuals column to see transactions for just that budget category

Grant - Grant LAS	Principal Investigator	Sponsor	Grant Specific Restrictions	SPA Contact	Award Contract Start Date	Award Contract End Date	Grant Budget	Grant Actuals LTD	Grant Obligations LTD	Remaining Balance	Burn Rate	Time Elapsed
Grant		Dartmouth College		David Musto	09/30/2017	07/31/2022	\$355,093.00	\$355,093.00	\$0.00	\$0.00	100%	99%
1015		Dartmouth College		David Musto	09/30/2017	07/31/2022	\$355,093.00	\$355,093.00	\$0.00	\$0.00	100%	99%
WPI Parent Account Set: GR-01 - Faculty Salaries and							\$93,321.00	\$90,982.82	\$0.00	\$2,338.18	97%	0%
WPI Parent Account Set: GR-02 - All Other Salaries and							\$74,618.00	\$75,555.79	\$0.00	(\$937.79)	101%	0%
WPI Parent Account Set: GR-03 - Fringe Benefits							\$18,125.00	\$29,301.60	\$0.00	(\$11,176.60)	162%	0%
WPI Parent Account Set: GR-04 - Tuition							\$39,458.00	\$22,190.50	\$0.00	\$17,267.50	56%	0%
WPI Parent Account Set: GR-05 - Fees and Insurance							\$3,460.00	\$2,914.50	\$0.00	\$545.50	84%	0%
WPI Parent Account Set: GR-06 - Supplies							\$3,802.00	\$218.64	\$0.00	\$3,583.36	6%	0%
WPI Parent Account Set: GR-07-08 - Travel							\$9,542.00	\$1,780.44	\$0.00	\$7,761.56	19%	0%
WPI Parent Account Set: GR-10 - Professional Services							0.00	\$15,740.00	\$0.00	(\$15,740.00)	0%	0%
WPI Parent Account Set: GR-12 - Other							\$3,000.00	0.00	\$0.00	\$3,000.00	0%	0%
WPI Parent Account Set: GR-14 - Indirect Cost							\$109,767.00	\$116,408.71	\$0.00	(\$6,641.71)	106%	0%

wd5.myworkday.com/wpi/d/gateway.html?reloadToken=877d8bcafa89c603fa7dd1f3439cb7ae81749bff1772e7070d566f2c722203b2

Criteria View by: Select a Field... and then by: Select a Field... Refresh

then click refresh

you can add criteria here such as employee or supplier or ledger period

Ledger Account	Operational Transaction Journal	Spend Category	Expense Item	Memo	Employee as Worktag	Supplier as Worktag	Journal Number	Grant	Award	Fund	Time Elapsed		
61130:Salary - Non Faculty Research		Staff - Research							(version 1)	210-FD Sponsored Programs	84%		
61130:Salary - Non Faculty Research		Staff - Research								210-FD Sponsored Programs	84%		
61130:Salary - Non Faculty Research		Staff - Research								210-FD Sponsored Programs	0%		
61130:Salary - Non Faculty Research		Staff - Research								210-FD Sponsored Programs	0%		
								\$22,346.00	\$5,212.91	0.00	\$17,133.09	23%	0%
								\$0.00	0.00	0.00	\$0.00	0%	0%

You can do the same with Obligations:

> Details

Q1 FY19 transactional data from Banner has been posted. The Finance Office will continue to make adjustments to beginning balances and year to date actuals.

14 Items

Grant - Grant LAS	Award Contract Start Date	Award Contract End Date	Grant Budget	Grant Actuals LTD	Grant Commitments LTD	Grant Obligations LTD	Remaining Balance	Remaining Balance %	Time Remaining
Grant	05/03/2016	05/31/2019	\$1,799,527.17	\$1,434,764.26	\$0.00	\$83,436.71	\$281,326.20	15.63%	9.35%
12345GR Test grant	05/03/2016	05/31/2019	\$1,799,527.17	\$1,434,764.26	\$0.00	\$83,436.71	\$281,326.20	15.63%	9.35%
210-FD Sponsored Programs			\$1,799,527.17	\$1,434,764.26	\$0.00	\$83,436.71	\$281,326.20	15.63%	0.00%
WPI Parent Account Set: GR-01 - Salaries and Wages			\$1,470,939.14	\$1,120,437.52	0.00	\$67,278.88	\$283,222.74	19.25%	0.00%
WPI Parent Account Set: GR-03 - Fringe Benefits			0.00	\$0.00	0.00	\$16,157.83	(\$16,157.83)	0.00%	0.00%
WPI Parent Account Set: GR-04 - Tuition			0.00	\$0.00	0.00	0.00	\$0.00	0.00%	0.00%
WPI Parent Account Set: GR-05 - Fees and Insurance			0.00	\$15.00	0.00	0.00	(\$15.00)	0.00%	0.00%
WPI Parent Account Set: GR-06 - Supplies			\$192,088.03	\$32,502.69	\$0.00	\$0.00	\$159,585.34	83.08%	0.00%

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Criteria View by: Select a Field... and then by: Select a Field... Refresh

then click refresh

99 Items

Ledger Account	Designee	Operational Transaction Journal	Spend Category	Expense Item	Memo	Employee as Worktag	Supplier as Worktag	Journal Number	Grant	Award	Fund	Time Elapsed		
61130:Salary - Not Faculty Research	Employee as Worktag	Operational Transaction Journal	Staff - Research							(version 1)	210-FD Sponsored Programs	84%		
61130:Salary - Not Faculty Research											210-FD Sponsored Programs	84%		
61130:Salary - Not Faculty Research											210-FD Sponsored Programs	0%		
61130:Salary - Not Faculty Research											210-FD Sponsored Programs	0%		
61130:Salary - Not Faculty Research											210-FD Sponsored Programs	0%		
									\$22,346.00	\$5,212.91	0.00	\$17,133.09	23%	0%
									\$0.00	0.00	0.00	\$0.00	0%	0%

you can add criteria here such as employee or supplier or ledger period

You can export the report to excel to add in your own budget projections.

WPI

Grant Budget vs Actual (Sponsor Funded)

Period: Fiscal Year 2023 - July Grant(s): Grant: 1

1. Click arrow left of grant # to expand

2 Items

Grant - Grant LAS	Principal Investigator	Sponsor	Grant Specific Restrictions	SPA Contact	Award Contract Start Date	Award Contract End Date	Grant Budget	Grant Actuals LTD	Grant Obligations LTD	Remaining Balance	Burn Rate	Time Elapsed
Grant		National Science Foundation		David Musto	08/01/2019	07/31/2024	\$502,868.00	\$180,873.79	\$18,269.92	\$303,724.29	36%	59%
1		National Science Foundation		David Musto	08/01/2019	07/31/2024	\$502,868.00	\$180,873.79	\$18,269.92	\$303,724.29	36%	59%

Once exported, clear the outline format to get all the budget line details.

Grant Budget vs Actual (Sponsor Funded) 2022-07-14 11:18 EDT.xlsx - Excel

go to the data tab

click ungroup and clear outline

Grant Budget vs Actual (Sponsor Funded)