

How to find unique budget actions using the Business Warehouse Reports

There are two reports that will help you see what budget actions have been processed against a grant. Below are the instructions for running each report from the Grants Management (Distributed) folder. The results of both reports work best for grants where budget action(s) processed after August 2014 due to a KCRM update in that month. Prior to that period budget actions for direct costs roll forward and display during the period of the most recent budget update.

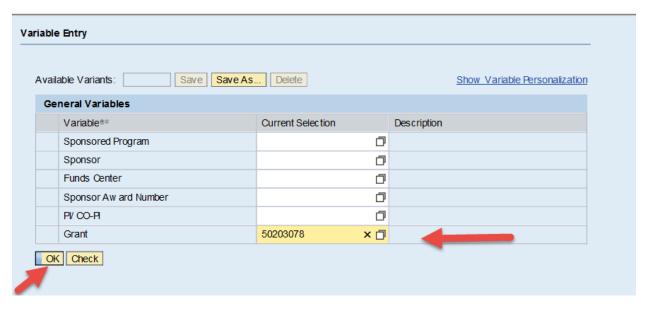
Report 1 - Grant Budget Details:



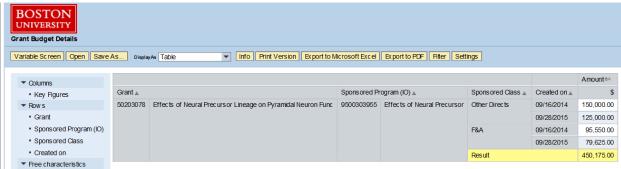
At the variable screen enter the eight digit Grant number that begins with either a 50 or 55. You can also enter the ten digit Sponsored Program number that begins with the either 950 or 955; however, we recommend using the Grant number as you will get the details of all the Sponsored Programs associated with the grant when you use Grant number.



Screenshot of the variable entry page:



Result after entering Grant and selecting OK:



Move Created on Date to first column, result:





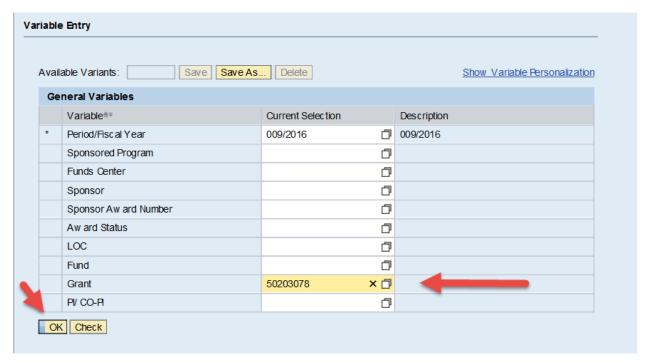
Report 2 - Budget vs Actual:



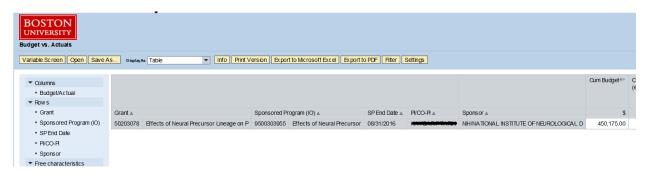
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Screenshot of the variable entry page:



Result after entering Grant and selecting OK:

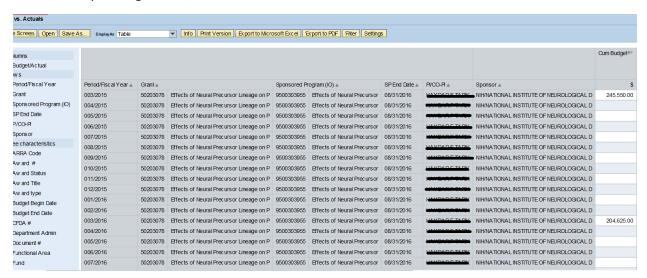


From the Free Characteristics drag <u>Period/Fiscal Year</u> into report, below is a screenshot of the Free Characteristic:



- Aw ard #
- Aw ard Status
- Aw ard Title
- Aw ard type
- Budget Begin Date
- Budget End Date
- CFDA #
- Department Admin
- Document #
- Functional Area
- Fund
- Funds Center
- Fund Type for GM
- G/L Account
- Grant Valid from
- Grant Valid to
- Letter of Credit
- Lifecycle Status
- OSP Administrator
- Over Head Key
- PAFO Administrator
- Period/Fiscal Year
- Prime Sponsor
- Project End Dt
- Project Start Dt
- SP Funds Center

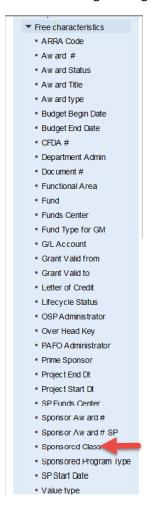
Result when you drag Period/Fiscal Year into the row above Grant:





Important to Note: Period/Fiscal Year applies to all finance categories in the report. If you are only interested in seeing budget actions you can remove the expense categories from the report. You can also limit the Period/Fiscal year display through the filtering function if you are looking for an item in a particular month or period. Running wide open as described above allows you to see all activity, you can always drag unwanted information out once you have everything.

To see the budget categories add Sponsored Class from the free characteristics into the report



Snapshot of the result when you drag Sponsored Class into the row above Grant:

								Cum Budget≜=
Sponsored Class	Grant ≜		Sponsored Program (IO) ±		SP End Date ≜	PVCO-PI ≜	Spons or ±	s
33 OTHER DIRECTS	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	***********	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	150,000.00
35 F&A	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	-	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	95,550.00
02 SALARIES & WAGES	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	-	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	
03 FRINGE	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	-	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	
04 RES SUP & MIN EQU	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	***********	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	
13 OTHER CONT SVS	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	HANDARFTARK	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	
22 ANIMAL CARE	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	HANDADETADIK	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	
30 OFFICE SUPPLIES	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	HAMBARETARK	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	
33 OTHER DIRECTS	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	HANDADETADIK	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	125,000.00
35 F&A	50203078	Effects of Neural Precursor Lineage on P	9500303955	Effects of Neural Precursor	08/31/2016	HANDADETADIK	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	79,625.00
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