

## 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:

**Variable Entry**

Available Variants:  Save Save As... Delete [Show Variable Personalization](#)

General Variables			
Variable <sup>≠</sup>	Current Selection		Description
Sponsored Program		<input type="checkbox"/>	
Sponsor		<input type="checkbox"/>	
Funds Center		<input type="checkbox"/>	
Sponsor Award Number		<input type="checkbox"/>	
PI/ CO-PI		<input type="checkbox"/>	
Grant	50203078	<input checked="" type="checkbox"/>	

OK Check

Result after entering Grant and selecting OK:

**BOSTON UNIVERSITY**  
Grant Budget Details

Variable Screen Open Save As... Display As Table Info Print Version Export to Microsoft Excel Export to PDF Filter Settings

Columns	Grant	Sponsored Program (IO)	Sponsored Class	Created on	Amount <sup>≠</sup>
Key Figures	50203078	9500303955	Other Directs	09/16/2014	150,000.00
Rows	Effects of Neural Precursor Lineage on Pyramidal Neuron Func	Effects of Neural Precursor	F&A	09/28/2015	125,000.00
Grant				09/16/2014	95,550.00
Sponsored Program (IO)				09/28/2015	79,625.00
Sponsored Class			Result		450,175.00
Created on					
Free characteristics					

Move Created on Date to first column, result:

**BOSTON UNIVERSITY**  
Grant Budget Details

Variable Screen Open Save As... Display As Table Info Print Version Export to Microsoft Excel Export to PDF Filter Settings

Columns	Created on	Grant	Sponsored Program (IO)	Sponsored Class	Amount <sup>≠</sup>
Key Figures	09/16/2014	50203078	9500303955	Other Directs	150,000.00
Rows		Effects of Neural Precursor Lineage on Pyramidal Neuron Func	Effects of Neural Precursor	F&A	95,550.00
Created on				Result	245,550.00
Grant				Other Directs	125,000.00
Sponsored Program (IO)	09/28/2015	50203078	9500303955	F&A	79,625.00
Sponsored Class				Result	204,625.00
Created on					
Free characteristics					

## Report 2 - Budget vs Actual:



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:

**Variable Entry**

Available Variants:     [Show Variable Personalization](#)

General Variables			
Variable <sup>△</sup>	Current Selection		Description
* Period/Fiscal Year	009/2016	<input type="checkbox"/>	009/2016
Sponsored Program		<input type="checkbox"/>	
Funds Center		<input type="checkbox"/>	
Sponsor		<input type="checkbox"/>	
Sponsor Award Number		<input type="checkbox"/>	
Award Status		<input type="checkbox"/>	
LOC		<input type="checkbox"/>	
Fund		<input type="checkbox"/>	
Grant	50203078	<input checked="" type="checkbox"/>	
PI/CO-PI		<input type="checkbox"/>	


Result after entering Grant and selecting OK:

**BOSTON UNIVERSITY**  
Budget vs. Actuals

Variable Screen | Open | Save As... | Display As: Table | Info | Print Version | Export to Microsoft Excel | Export to PDF | Filter | Settings

Columns							Cum Budget <sup>△</sup>	C
Row s	Grant <sup>△</sup>	Sponsored Program (IO) <sup>△</sup>	SP End Date <sup>△</sup>	PI/CO-PI <sup>△</sup>	Sponsor <sup>△</sup>		\$	
• Grant	50203078	Effects of Neural Precursor Lineage on P	08/31/2016		NH/NATIONAL INSTITUTE OF NEUROLOGICAL D		450,175.00	

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

- Award #
- Award Status
- Award Title
- Award 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:

vs. Actuals

Screen | Open | Save As... | Display As: Table | Info | Print Version | Export to Microsoft Excel | Export to PDF | Filter | Settings

Columns	Period/Fiscal Year	Grant	Sponsored Program (IO)	SP End Date	P/CO-R	Sponsor	Cum Budget <sup>15*</sup>
Budget/Actual	003/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	245,550.00
Rows	004/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Period/Fiscal Year	005/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Grant	006/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Sponsored Program (IO)	007/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
SP End Date	008/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
P/CO-R	009/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Sponsor	010/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
see characteristics	011/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
ARRA Code	012/2015	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Award #	001/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Award Status	002/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Award Title	003/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	204,625.00
Award type	004/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Budget Begin Date	005/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Budget End Date	006/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
CFDA #	007/2016	50203078	Effects of Neural Precursor Lineage on P 9500303955	08/31/2016	<del>HANDRE TACK</del>	NIH NATIONAL INSTITUTE OF NEUROLOGICAL D	
Department Admin							
Document #							
Functional Area							
Fund							

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

- ▼ Free characteristics
  - ARRA Code
  - Award #
  - Award Status
  - Award Title
  - Award type
  - Budget Begin Date
  - Budget End Date
  - CFDA #
  - Department Admin
  - Document #
  - Functional Area
  - Fund
  - Funds Center
  - Fund Type for GM
  - GL Account
  - Grant Valid from
  - Grant Valid to
  - Letter of Credit
  - Lifecycle Status
  - OSP Administrator
  - Over Head Key
  - PAFO Administrator
  - Prime Sponsor
  - Project End Dt
  - Project Start Dt
  - SP Funds Center
  - Sponsor Award #
  - Sponsor Award # SP
  - Sponsored Class
  - Sponsored Program type
  - SP Start Date
  - Value type

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

Period/Fiscal Year ▲	Sponsored Class ▲	Grant ▲	Sponsored Program (IO) ▲		SP End Date ▲	PI/CO-PI ▲	Sponsor ▲	Cum Budget <sup>SP</sup>
003/2015	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
003/2016	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	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	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	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	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	NIH/NATIONAL INSTITUTE OF NEUROLOGICAL D	79,625.00	