# How to Run the PI Executive Summary in BW

**Purpose:** The PI Executive Summary in BW offers a summary view of the budget, expenses, and remaining budget available. Direct expenses, cost share, or both can be viewed with this report.

## Procedures

In the Grants Management down menu, choose Grant Ledger – PI Summary exec summary

Enter Fiscal Period/Year in the format xxx/xxxx using 3 digits for the fiscal period (001 for July, 002 for August, etc) and 4 digits for the fiscal year. Enter the WBS element in the Grant field. Execute.
Results will show direct expenses and cost share combined in the expenses column. The budget column will only show the sponsor budget as cost share budgets are not in the system. You can filter the results to show the information you need.
In the free characteristics column, choose Fund and click the filter button. A pop-up window appear and you can choose either sponsor funds or cost share funds.

Input the cost object to be viewed. Then click on Execute. Note: If this step is not completed, the view information will be associated with the cost object that was used to create the view and not the cost object you are using.
Results shown for direct funds. More detail is available under each category using the drop down arrows at the left of the screen.

Results shown for cost share funds.

Questions?
Please contact the assigned FA for that grant found under the Responsibilities tab in GMGRANTD.