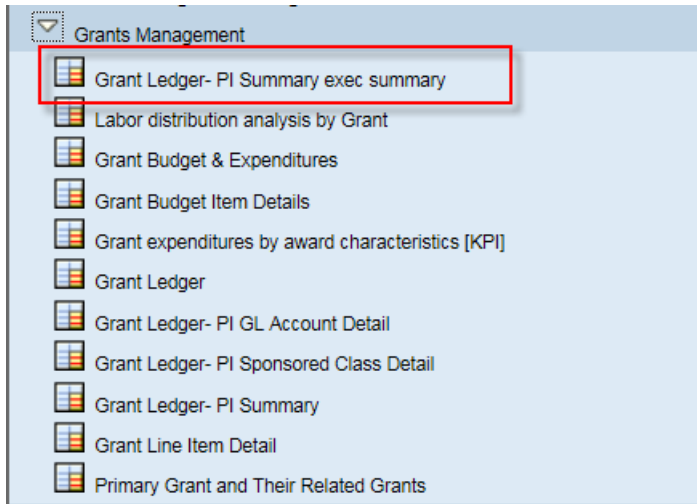


## How to Run the PI Executive Summary in BW

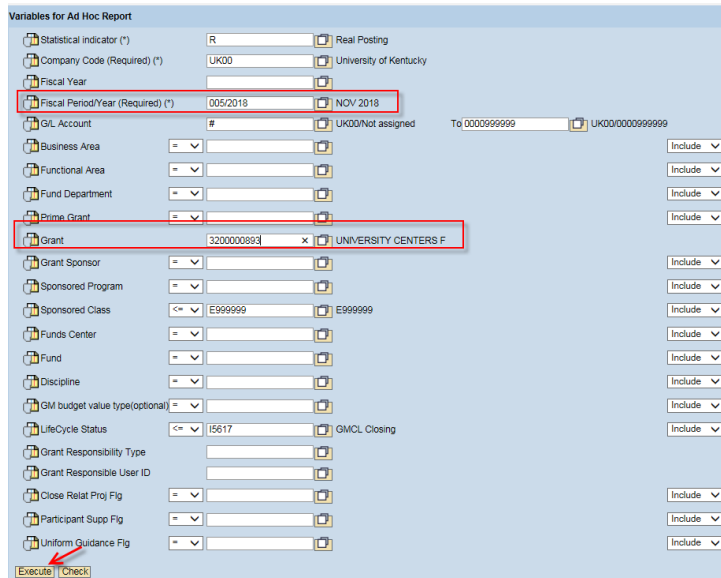
**Purpose:** The PI Executive Summary in BW offers a summary view of the budget, expenses, and remaining budget available. Direct expenses, cost share, or both can be viewed with this report.

### 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.



Quick Reference Card – BW PI Executive Summary

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.

Grant		GM budget from date	GM budget to date	Released Budget	Cumulative PTD Expense	Available Balance (Released)
3200000893	RYAN WHITE TITLE III	09/01/2016	08/31/2017	\$ 91,154.20	\$ 93,818.53	\$ (2,664.33)
▶ E511000	Direct Salary & Bene			\$ 34,076.47	\$ 38,696.53	\$ (4,620.06)
▶ E512030	Secret/Clerical Sal			\$ 19,835.00	\$ 20,316.76	\$ (481.76)
▶ E530300	Direct Current Expen			\$ 34,303.00	\$ 31,865.51	\$ 2,437.49
▶ E536120	Patient Care and Sup			\$ 1,342.62	\$ 1,342.62	\$ 0.00
▶ E540334	Office Supplies			\$ 181.11	\$ 181.11	\$ 0.00
▶ E590020	F&A Costs			\$ 1,416.00	\$ 1,416.00	\$ 0.00

Quick Reference Card – BW PI Executive Summary

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.

The screenshot shows a list of characteristics under the heading 'Free Characteristics'. The 'Fund' row is highlighted with a red box, and a red arrow points to the filter icon in that row. Below the list is a pop-up window titled 'Select Filter Value for Fund'. It contains a search field, radio buttons for 'Search in Key' (selected) and 'Search in Text', a 'Maximum Number of Hits' field set to 200, and a 'Find' button. Below the search results, there are two checkboxes: 'UK00/0011890200 MED CTR COST SHARE' and 'UK00/0226000000 Federal Sponsor'. At the bottom of the pop-up, there are 'Select All' and 'Deselect' buttons, and a 'Description of Filter Values' section with a range selector and an 'Include' dropdown.

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.

The screenshot shows the 'Variables for Ad Hoc Report' form. It contains several fields with dropdown menus and checkboxes. The 'Funds Center' field is set to '1013194130' and is highlighted with a red box. The 'Grant' field is also highlighted with a red box. At the bottom of the form, there is an 'Execute' button and a 'Check' button.

Quick Reference Card – BW PI Executive Summary

Results shown for direct funds. More detail is available under each category using the drop down arrows at the left of the screen

Grant		GM budget from date	GM budget to date	Released Budget	Cumulative PTD Expense	Available Balance (Released)
3200000893	RYAN WHITE TITLE III	09/01/2016	08/31/2017	\$ 91,154.20	\$ 91,154.20	\$ 0.00
E511000	Direct Salary & Bene			\$ 34,076.47	\$ 36,032.20	\$ (1,955.73)
E511000	Direct Salary & Bene			\$ 34,076.47		\$ 34,076.47
E511011	Faculty Salary				\$ 5,593.72	\$ (5,593.72)
E512071	Nonadmin/RN Staff Sa				\$ 21,313.12	\$ (21,313.12)
E522000	Staff Benefits				\$ 1,418.67	\$ (1,418.67)
E522010	Faculty Benefits				\$ 1,144.90	\$ (1,144.90)
E522071	Nonadmin/RN Staff Be				\$ 6,561.79	\$ (6,561.79)
E512030	Secret/Clerical Sal			\$ 19,835.00	\$ 20,316.76	\$ (481.76)
E530300	Direct Current Expen			\$ 34,303.00	\$ 31,865.51	\$ 2,437.49
E536120	Patient Care and Sup			\$ 1,342.62	\$ 1,342.62	\$ 0.00
E540334	Office Supplies			\$ 181.11	\$ 181.11	\$ 0.00
E590020	F&A Costs			\$ 1,416.00	\$ 1,416.00	\$ 0.00

Results shown for cost share funds.

Grant		GM budget from date	GM budget to date	Released Budget	Cumulative PTD Expense	Available Balance (Released)
3200000893	RYAN WHITE TITLE III	09/01/2016	08/31/2017		\$ 2,664.33	\$ (2,664.33)
E511000	Direct Salary & Bene				\$ 2,664.33	\$ (2,664.33)
E511011	Faculty Salary				\$ 2,211.50	\$ (2,211.50)
E522010	Faculty Benefits				\$ 452.83	\$ (452.83)

**Questions?**

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

