

## **Snapshot by Grant**

**The Snapshot by Grant document summarizes grant activity by fund. It provides summary totals for revenues, direct expenditures, indirect expenditures, and total expenditures for each funds associated with a particular grant. The document also groups funds as either sponsored funds or cost share/other funds. There are three different views that are available.**

The views included in the document are:

1. By Organization – provides the selected grants with organization as the primary sort.
2. By Grant – provides the selected grants with grant as the primary sort.
3. By PI – provides the selected grants with principal investigator as the primary sort.

### **How to run the document you want**

Click the Snapshot by Grant option on the Finance Reporting Menu to open the version menu. You will then be prompted to complete the report filters below.

### **Report filters**

1. **Calendar Month and Year (Required):** Select the calendar month and year corresponding to the last fiscal period to include in the report from the drop-down menu. CURRENT and PRIOR are displayed for the current month and previous month respectively. These options are useful when creating subscriptions for the report to run each month automatically.
2. **Grant Organization (Optional):** Move the desired organization code/codes from the Available box to the Selected box.
3. **Grant Code (Optional):** Move the desired grant code/codes from the Available box to the Selected box.
4. **Principal Investigator (Optional):** Move the desired principal investigator from the Available box to the Selected box.

When you have completed your selections, click Run Document at the bottom left corner.

### **Report Views**

Use the drop-down lists at the top of the document to filter your results as needed.

### **Tips**

Click the options menu on the toolbar (3 horizontal lines) to print, export to PDF, re-prompt, or schedule delivery.

Open the underlying report (data set) by clicking the Data Extract link. To download to excel, click the “Report Home” drop down menu, and select “Export > Excel with...”. Complete the export options as desired.

### **NOTE**

This document displays output based on the current Banner set up for grant, fund, account, and organization. For example, if the organization code on a grant has been changed from 012301 to 012302, all activity for the grant will be reported under organization 012302 regardless of what time frame the report is submitted for.