



Find your current available Grant balance using Business Intelligence (BI) Reports

Preparing people to lead extraordinary lives

LOYOLA
UNIVERSITY CHICAGO
AD MAJOREM DEI GLORIAM
1870

Business Intelligence Login

User ID:

Password:

Access BI

Navigate to the BI login page, <https://bi.luc.edu/>. Use your Loyola UVID and password to access the BI portal.

Once you log in, look at the Portals on the left side of the screen. Under Finance, choose, *Grant Summary and Detail*.

Please note Your view may differ from the view displayed in this tutorial, depending on your level of access. The title of the report will remain the same, though, so always look for the title of the report listed here.





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Select a Report

Filter

- Content
 - Finance
 - Financial Reports
 - Accounting Unit Reports
 - Capital Reports
 - Detail Reports
 - Documentation
 - Financial Aid Detail
 - Grant & Research Reports
 - Grant Balances by PI or Level
 - Grant Non-Payroll Detail by PI or Level
 - Grant Payroll Detail by PI or Level
 - Grant Summary and Detail**
 - Grant Summary Reports by PI or Level
 - Pending Closeout Snapshot
 - Periodic Billing Report
 - Student Financial Detail
 - SPA
 - Favorites
 - Portals

Report Output ▾ Grant Summary and Detail ▾

Loyola University Chicago

Grant Summary and Detail Report

Select Parameters

Fiscal Year: 2018 ▾

Period: 12 - June ▾

Grant AU: Sample Grant AU

Make selections to include additional detail (optional):

Transaction Data: Do not Include ▾

Payroll Data: Do not Include ▾

Commitment Data: Do not include ▾

Report Controls

Select an Output Format: PDF ▾

Run Report

Select the desired year and month you wish to view, as well as the Accounting Unit. Detailed expenses can be viewed if desired by choosing to include them in the Expense Detail section.

Reports can be run in PDF or Excel formats. Choose your output format and click Run Report.



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Loyola University Chicago Grant Summary 5XXXXX – SAMPLE GRANT as of 06/30/2018

PI:
SPA GA:
End Date: 08/06/2018
LU/PTAP #:
F/A Base & Rate: 0%
Status: Active

ACCOUNT SUMMARY

Salary Expense

	Budget	Prior Years Expenditures	Current YTD	Current MTD	Commitments	Available Balance
5020 NONTENURE TRACK FT FACULTY SAL	2,770.22	.00	2,879.94	359.99	.00	(109.72)
5120 STAFF SALARY- FT NON-EXEMPT	4,497.78	.00	2,966.88	.00	.00	1,530.90
5130 STAFF SALARY- PART TIME	1,484.23	.00	.00	.00	.00	1,484.23
Total Salary Expense	8,752.23	.00	5,846.82	359.99	.00	2,905.41

Benefit Expense

5800 BENEFIT EXPENSE - FACULTY	892.01	.00	927.34	115.92	.00	(35.33)
5803 BENEFIT EXPENSE - STAFF FT	1,520.25	.00	1,002.81	.00	.00	517.44
5804 BENEFIT EXPENSE - STAFF PT	115.77	.00	.00	.00	.00	115.77
Total Benefit Expense	2,528.03	.00	1,930.15	115.92	.00	597.88

Direct Non-Salary Expense

6110 SUPPLIES-INSTRUCT/PROGRAM	173.66	.00	.00	.00	.00	173.66
6300 TRAVEL - LOCAL (NON-RECR/INSTR)	146.08	.00	.00	.00	.00	146.08
Total Direct Non-Salary Expense	319.74	.00	.00	.00	.00	319.74

TOTAL 518415

TOTAL 518415	11,600.00	.00	7,776.97	475.91	.00	3,823.03
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The Available balance is displayed in the right-hand column, at the bottom of the page.

*ESTIMATED Available Direct Cost / (Deficit) :

\$3,823.03 *

This represents the estimated available amount of direct expenditures remaining in the grant. (Total Cost divided by 1 plus the F/A Rate above).
This calculation may be understated if you have future equipment purchases that are not subject to the F/A Rate.

*If this report is run before month end, indirect cost for the current month should be considered in calculating the available fund balance.