HOW TO query a Grant Balance in Banner (FRIGITD)

The form FRIGITD allows authorized users* to view transactions posted to a fund that is linked to a grant in a grant ledger view.

*Authorized User = An individual with Banner access to the Finance module.

Before You Begin:

- This is a grant ledger view of the transactions posted to a fund that is linked to a grant. The transactions are presented from the inception of the grant to date.
- Transactions in other currencies will be posted to the appropriate FOAPAL(s) in the Canadian dollar equivalent.

Viewing the available balance of a Grant:

Steps:

- 1. Select **FRIGITD** from the **Finance Fast Track Menu** on the Main Menu or type **FRIGITD** in the **Go** field and hit **Enter**.
- 2. Tab to the **Grant** field and enter the grant number or click on the **Search** icon to perform a search.
- 3. Tab to the **Fund** field and enter the fund code that is linked to the grant or click on the **Search** icon to perform a search. Tab out and the defaults will come in.
- 4. Tab to the **Program** field and **clear** if all programs codes are to be included.
- 5. Tab to the **Activity** field and **clear** if all activity codes are to be included.
- 6. Tab to the **Location** field and **clear** if all location codes are to be included.
- 7. Select **Include Revenue Accounts** check box if Revenue accounts transactions are to be returned on the form

Note: The available balance is not calculated properly as a result.

- 8. Click on the **Next Block** icon or use **Ctrl-Page Down** if using the keyboard.
- 9. The transactions will be displayed in summary by account code. The fields displayed included **Account, Type, Adjusted Budget, Activity, Commitments** and **Available Balance**.
- 10. To review the list of transactions for a specific account code, highlight the appropriate row. Select **Grant Detail Information (FRIGTRD)** from the **Options Menu.**

Additional Notes:

Positive spending power is defined as the positive available balance, Adjusted Budget less (Activity and Commitments). A grant is overspent if the grant has a negative available balance.

With the introduction of **Budget Availability Checking**, started, pending, completed but not yet approved and disapproved transactions have an immediate impact on your spending power.