



# ***GMS Award Status Report by Dept. or Award – Excel Version (UFS)***

This **UFS, Grants** report provides details on an individual award or all awards that are held by the department. This will produce one excel document with seven worksheets of data, which includes expenditure at award summary, project summary, task category and type level. Whether you run the report for a single award or for the departmental organisation, the report will run straight away, whereas the non-excel version if run by organisation runs overnight.

**Used for** month and year-end monitoring of awards

**Responsibility:** GM Grants Administrator or GM Grants Investigator  
**Navigate:** Requests > Run > OK to Single Request

## **Report parameters**

1. Complete the **Parameters** screen with the relevant information.

Parameters	
Award Number	Either complete with an award number held by your department or leave it blank to list all awards within the department
From Award Organisation	Enter or select your organisation from the list of values e.g. ZZ_Ecology
To Award Organisation	Enter or select your organisation from the list of values e.g. ZZ_Ecology
Principle Investigator	Leave blank or select from the list of values to produce a report by a named Principle Investigator.
Include Closed Awards	Change to <b>Yes</b> if you would like to include all Closed and On Hold awards.

### **Example**

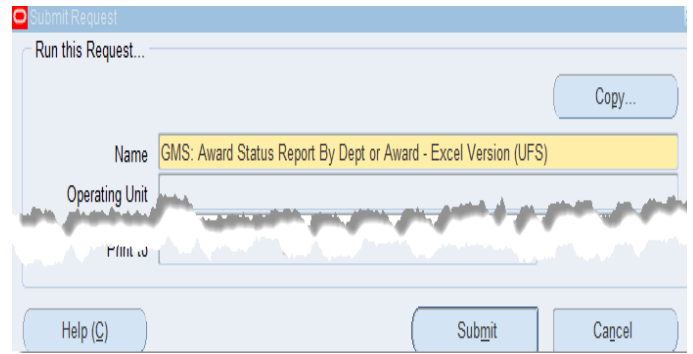
The screenshot shows a 'Parameters' dialog box with the following fields and values:

- Award Number:** RG12345
- From Award Organisation:** (empty)
- To Award Organisation:** (empty)
- Principal Investigator:** (empty)
- Include Closed Awards:**  Yes  No

Buttons at the bottom: OK, Cancel, Clear, Help.

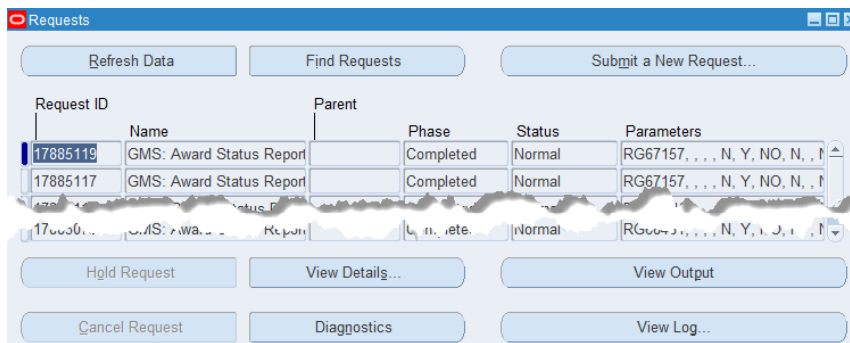
Detailed Procedure  
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2. Once parameters have been entered, click on **OK** to display the **Submit Request** screen.



3. Click **Submit**, to display the **Requests** screen.

4. Click on **Refresh Data**, until the **Phase** and **Status** shows as **Completed** and **Normal**.



5. Click **View Output**.

### Opening in Excel

Internet Explorer	Firefox
<p>You must click on <b>Save</b> or <b>Save as</b>. Do not click on <b>Open</b> at this point as this can cause the pivot tables in excel not to calculate correctly.</p>	<p>Click on <b>Open With</b> ensuring the field populates with <b>Microsoft Excel (default)</b>.</p>
<p>Once download is complete, click on <b>Open</b>. An example output is on page</p>	<p>Click <b>OK</b></p>

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Refer to page 5 on guidance for 'Converting a report to the latest excel format' if you are using excel version 2003-2007. This will make the file significantly smaller once converted to xlsx.

**Example report output (individual award only)**

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**Tab 1: Report Information**

Report Name	GMS: Award Status Report By Dept or Award - Excel Version (UFS)				
Report Date	15-Apr-16 11:18				
<b>Parameters Entered</b>					
Award Organisation - From					
Award Organisation - To					
Award Number	RG12345				
Award Manager					
Include Closed Award(s)?	N				
<b>Notes:</b>					
- This report excludes expenditures that have failed funds checking					
- When printing please note that the Award and Project summary tabs have been configured to print in A3, landscape format while the other tabs are configured to print on A4.					
<b>Reconciliation</b>					
	Budget	Expenditure	Commitment	Total Cost	Funds Available
Award Summary Tab	5,759,119.00	3,111,435.05	18,857.23	3,130,292.28	2,628,826.72
Data Tab	5,759,119.00	3,111,435.05	18,857.23	3,130,292.28	2,628,826.72
Difference	0.00	0.00	0.00	0.00	0.00
Please ensure that the Reconciliation checks above show there are no differences between the totals for the Award Summary Tab and Data Tab. If there are differences please save the output before opening.					
<span>Report Information</span> / <span>Award Summary</span> / <span>Project Summary</span> / <span>By Task</span> / <span>By Task &amp; Category</span> / <span>By Task, Category &amp; Type</span>					

**Tab 2: Award Summary**

Award Number	Award Organisation	Project Number(s)	Award Title	Sponsor Reference	Award Manager(s)	Budget	Expenditure	Commitment	Total Cost	Funds Available	Start Date	End Date	Close Date	Status	Months Left as of 14-Apr-16	% time elapsed	% budget spent
RG12345	ZZ_Ecology	ZZAG/123	DO PLANT VIRUSES COMPENSATE THEIR HOSTS BY HELPING ATTRACT POLLINATORS?	LEVERHULME TRUST	RPF-2012-667 Peck, Doctor Margaret; Darlow, Doctor Rebecca	241,544.00	229,196.80	857.12	230,053.92	11,490.08	03/09/2012	31/05/2016	31-JUL-16	ACTIVE	1	97%	95%

Report Information / **Award Summary** / Project Summary / By Task / By Task & Category / By Task, Category & Type / Data

**Tab 3: Project Summary**

Award Number	Project Number	Project Description	Award Sponsor	Budget	Expenditure	Commitment	Total Cost	Funds Available	Start Date	End Date	Status	Months Left as of 14-Apr-16	% time elapsed	% budget spent
RG12345	ZZAG/123	DO PLANT VIRUSES COMPENSATE THEIR HOSTS BY HELPING ATTRACT POLLINATORS?	LEVERHULME TRUST	241,544.00	229,196.80	857.12	230,053.92	11,490.08	03-Sep-12	31-May-16	ACTIVE	1	97%	95%

Report Information / Award Summary / **Project Summary** / By Task / By Task & Category / By Task, Category & Type / Data

Tab 4: By Task

Award Manager (All)									
Data									
Award	Project	Task	Task Name	Budget	Expenditure	Commitments	Total Costs	Funds Available	
RG12345	ZZAG/123	1	DIRECT COSTS	217,544.00	205,778.28	790.13	206,568.41	10,975.59	
		2	Dr Peck	24,000.00	23,418.50	66.99	23,485.49	514.51	
		100	NON DIRECT COSTS	0.00	0.02	0.00	0.02	-0.02	
<b>ZZAG/123 Total</b>				<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>	
<b>RG12345 Total</b>				<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>	
<b>Grand Total</b>				<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>	

Tab 5: By Task & Category

Award Manager (All)										
Data										
Award	Project	Task	Task Name	Expenditure Category	Budget	Expenditure	Commitments	Total Costs	Funds Available	
RG12345	ZZAG/123	1	DIRECT COSTS	OTHER COSTS	24,000.00	22,476.47	790.13	23,266.60	733.40	
				STAFF COSTS	193,544.00	183,301.81	0.00	183,301.81	10,242.19	
				<b>DIRECT COSTS Total</b>	<b>217,544.00</b>	<b>205,778.28</b>	<b>790.13</b>	<b>206,568.41</b>	<b>10,975.59</b>	
		2	Dr Peck	OTHER COSTS	OTHER COSTS	24,000.00	23,418.50	66.99	23,485.49	514.51
					<b>Dr Peck Total</b>	<b>24,000.00</b>	<b>23,418.50</b>	<b>66.99</b>	<b>23,485.49</b>	<b>514.51</b>
		100	NON DIRECT COSTS	ESTATES COSTS	ESTATES COSTS	48,322.00	45,165.86	0.00	45,165.86	3,156.14
					INDIRECT COSTS	149,446.00	139,684.88	0.00	139,684.88	9,761.12
					INFRASTRUCTURE TECHNICIANS	7,423.00	6,938.18	0.00	6,938.18	484.82
					PI COSTS	0.00	0.00	0.00	0.00	0.00
					UNIVERSITY FUNDED	-205,191.00	-191,788.90	0.00	-191,788.90	-13,402.10
<b>NON DIRECT COSTS Total</b>				<b>0.00</b>	<b>0.02</b>	<b>0.00</b>	<b>0.02</b>	<b>-0.02</b>		
<b>ZZAG/123 Total</b>				<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>		
<b>RG12345 Total</b>				<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>		
<b>Grand Total</b>				<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>		

Tab 6: By Task, Category & Type

Award Manager (All)											
Data											
Award	Project	Task	Task Name	Expenditure Category	Expenditure Type	Budget	Expenditure	Commitments	Total Costs	Funds Available	
RG12345	ZZAG/123	1	DIRECT COSTS	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	733.40	
					Other Costs/Consumables	22,364.22	790.13	23,154.35	0.00		
					Other Costs/Miscellaneous	112.25	0.00	112.25	0.00		
		STAFF COSTS	-	193,544.00	0.00	0.00	10,242.19				
			Stipends	163,473.37	0.00	163,473.37	0.00				
			Wages	19,828.44	0.00	19,828.44	0.00				
		<b>DIRECT COSTS Total</b>					<b>217,544.00</b>	<b>205,778.28</b>	<b>790.13</b>	<b>206,568.41</b>	<b>10,975.59</b>
		2	Dr Peck	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	514.51	
					Other Costs/Consumables	22,896.09	66.99	22,963.08	0.00		
					Other Costs/Miscellaneous	522.41	0.00	522.41	0.00		
		<b>Dr Peck Total</b>					<b>24,000.00</b>	<b>23,418.50</b>	<b>66.99</b>	<b>23,485.49</b>	<b>514.51</b>
		100	NON DIRECT COSTS	ESTATES COSTS	-	0.00	0.00	0.00	0.00	3,156.14	
					Estates Costs - Chest	31,892.52	29,809.46	0.00	29,809.46	0.00	
					Estates Costs - Dept	16,429.48	15,356.40	0.00	15,356.40	0.00	
					INDIRECT COSTS	-	0.00	0.00	0.00	9,761.12	
Indirect Costs - Chest	98,634.36				92,192.03	0.00	92,192.03	0.00			
<b>NON DIRECT COSTS Total</b>					<b>0.00</b>	<b>0.02</b>	<b>0.00</b>	<b>0.02</b>	<b>-0.02</b>		
<b>ZZAG/123 Total</b>					<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>		
<b>RG12345 Total</b>					<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>		
<b>Grand Total</b>					<b>241,544.00</b>	<b>229,196.80</b>	<b>857.12</b>	<b>230,053.92</b>	<b>11,490.08</b>		

## Detailed Procedure GMS Award Status Report by Dept or Award - Excel Version

### Tab 7: Data

Award	Award Manager	Project	Task	Task Name	Expenditure Category Cat	Expenditure Type	Budget	Expenditure	Commitments	Total Costs	Funds Available
RG12345	Peck, Doctor Margaret;	ZZAG/123	1	DIRECT COSTS	OTHER COSTS	-	24000	0	0	0	733.4
						Other Costs/Consumables		22364.22	790.13	23154.35	0
						Other Costs/Miscellaneous		112.25	0	112.25	0
					STAFF COSTS	-	193544	0	0	0	10242.19
						Stipends		163473.37	0	163473.37	0
						Wages		19828.44	0	19828.44	0
			100	NON DIRECT COSTS	ESTATES COSTS	-		0	0	0	3156.14
						Estates Costs - Chest		31892.52	29809.46	0	29809.46
						Estates Costs - Dept		16429.48	15356.4	0	15356.4
					INDIRECT COSTS	-		0	0	0	9761.12
						Indirect Costs - Chest		98634.36	92192.03	0	92192.03
						University Funded - Dept		-69764.94	-65208.23	0	-65208.23
			2	Dr Peck	OTHER COSTS	-	24000	0	0	0	514.51
						Other Costs/Consumables		22896.09	66.99	22963.08	0
						Other Costs/Miscellaneous		522.41	0	522.41	0

### Converting a report to the latest excel format

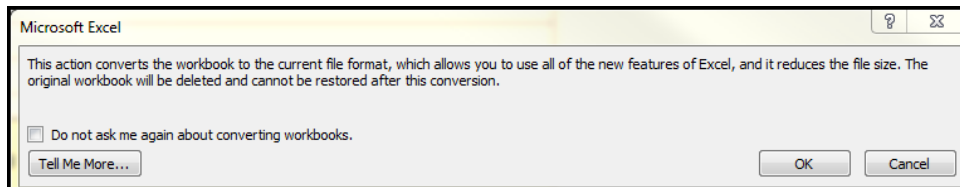
When running an excel version of an UFS report, if you are using excel version 2003-2007, you may wish to convert the file to xlsx to make it significantly smaller.

**Pre-Requisites** Report completed and opened into excel

#### 1. Navigate to **File, Info, Convert**



#### 2. Click **OK** to the message below.



#### 3. Click **Yes** to confirm that you want to reopen the report in the updated format.

