



# PI Grants Enquiry Report in Cognos

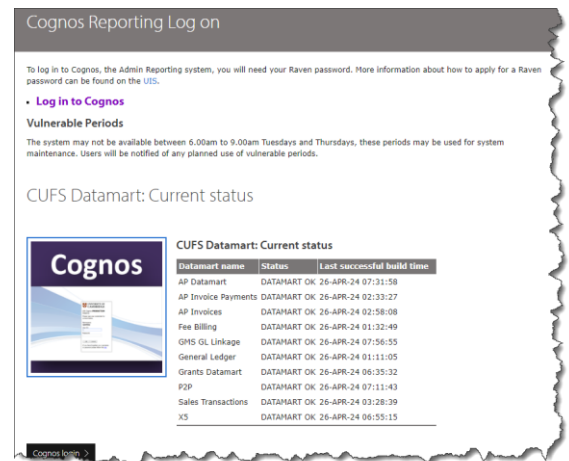
This guide is for PI's and explains how to log into Cognos, set up a tab that provides access to a summary report for their grants with drill down and exportable options.

## Access and signing into Cognos


A form will need to be completed by the Key Contact in you department requesting access to the grant folder for your School/Department. In addition you will need your **CRSID** and **Raven password**.

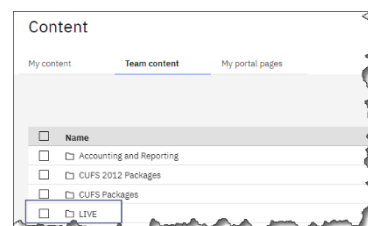
Upon confirmation that your access has been set up navigate to the **Admin Reporting** page <http://www.admin-reporting.cam.ac.uk/>

1. Click on the **Cognos Login** link, and check that the current status for the grants module is **'DATAMART OK'**. This means that it is fine to log in and run the reports.
2. Click on the link **Log in to Cognos**, this will open the Cognos instance screen where you enter your **CRSID** and **Raven password**.

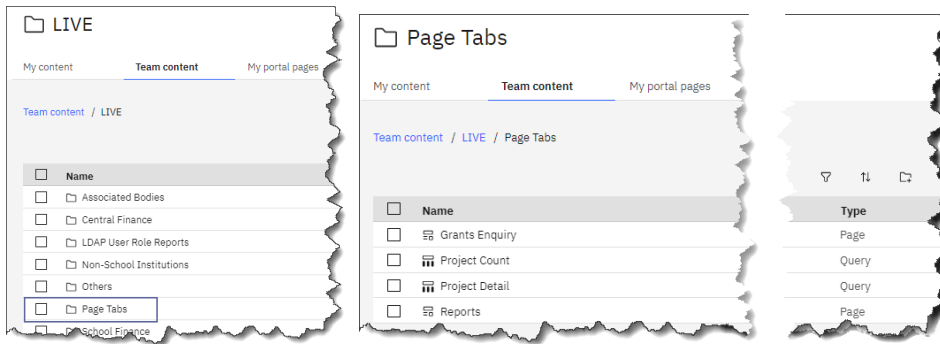


## Creating the PI grants enquiry tab

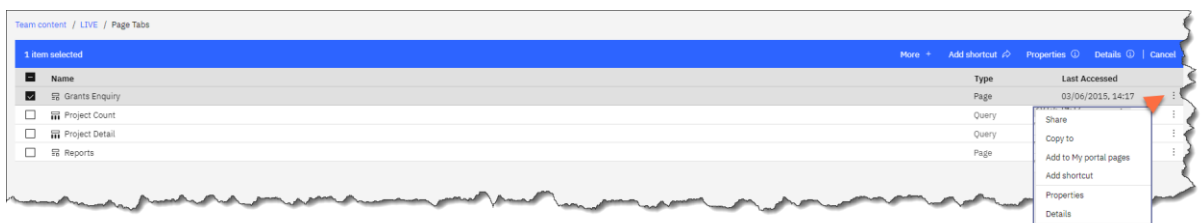
3. Click on  to bring up the **Content Menu**. Click on **Content**
4. Click on **Team Content** and then **Live**.



- Click on **Page Tabs** to display the two page options as per screen shot.



- Click in the box on the left for **Grants Enquiry**.



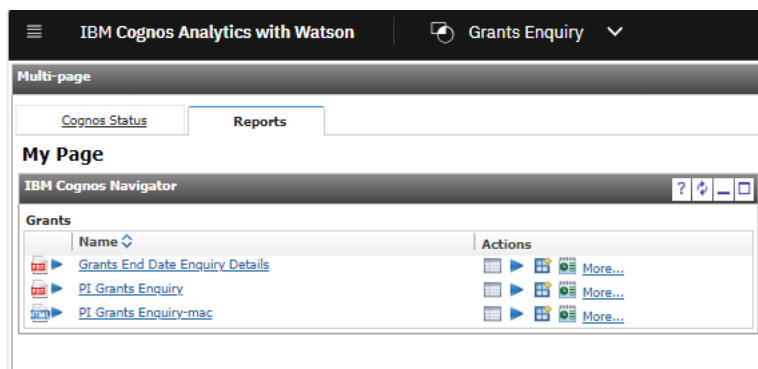
- To add this to your Cognos pages, click on the **action menu** at the far right hand side for the Grants Enquiry line and click **Add to my portal pages**.

A new **Grants Enquiry** shortcut will now show on **My portal pages**.

The next step is to run the summary report.

## Running the PI summary report

- Click on the **Grants Enquiry** and then click on **Reports** tab.



- Click on **PI Grants Enquiry** (use 'PI Grants Enquiry – mac', if accessing from a Mac machine) and select the department code from the drop down list, scroll to the bottom of the page and click **Finish**.

### PI Grants Enquiry

Please Select a Award Organisation: \*

- PI/s names will be displayed. Click on the name to access the summary view of awards. The budget and expenditure figures will be cumulative from the start of the award to the end of the previous working day (data is downloaded into Cognos from the University Finance System overnight).

Clicking on any of the blue links allows you to drill down for further information.

### Drilling down for further information

Further information available:

- A summary view of expenditure categories (budgets)
- Expenditure by type
- A listing of individual expenditure items and commitments

Click on the **Award Number** to break the summary view down by Expenditure Category (budget heading). The budget and expenditure figures will be cumulative from the start of the award.

A	B	C	D	E	F	G	H
<b>PI Grants Enquiry</b>							
<b>XX EXPERIMENTAL PUNTING</b>		<b>BOLL, DoctorT</b>					
Award PI Name	Award Number	Award End Date	Budget	Expenditure	Commitment	Surplus/(Deficit)	Award Status
<a href="#">AHMED, Ms. Z</a>	<a href="#">RG12345</a>	28 February 2011	110,000.00	109,000.00	0.00	1,000.00	ON_HOLD
<a href="#">BAKER, Doctor A</a>	<a href="#">RG12346</a>	30 November 2009	100,000.00	50,000.00	0.00	50,000.00	ACTIVE
<a href="#">BOLL, Doctor T</a>	<a href="#">RG12347</a>	25 February 2011	300,000.00	299,999.00	0.00	1.00	ON_HOLD
<a href="#">DESHIA, Professor J</a>	<a href="#">RG12348</a>	30 September 2012	20,000.00	15,000.00	0.00	5,000.00	ACTIVE
<a href="#">ELGAR, Mr. R</a>	<a href="#">RG12349</a>	30 June 2013	180,000.00	90,000.00	0.00	90,000.00	ACTIVE
<a href="#">FIENNES, Professor X</a>	<a href="#">RG12350</a>	31 March 2013	45,000.00	0.00	0.00	45,000.00	ACTIVE
<a href="#">GOOLE, Doctor E</a>							



RG12349 Details							
Award Start Date: 1 July 2008		Award End Date: 30 June 2013		Award Close Date: 31 August 2013			
Sponsor Name: POPPLETON COLLEGE OF TECH & MED							
Award Number	Project Short Code	Task Number	Expenditure Category	Budget	Expenditure	Commitment	Funds Available
<a href="#">RG12349</a>	<a href="#">XXAG/432</a>	1	OTHER COSTS	0.00	0.00	0.00	0.00
			STAFF COSTS	180,000.00	90,000.00	0.00	90,000.00
			TRAVEL AND SUBSISTENCE	0.00	0.00	0.00	0.00
			<b>TOTAL</b>	<b>180,000.00</b>	<b>90,000.00</b>	<b>0</b>	<b>90,000.00</b>
		100	ESTATES COSTS	4,000.00	3,000.00	0.00	1,000.00
			INDIRECT COSTS	5,000.00	4,000.00	0.00	1,000.00
			INFRASTRUCTURE TECHNICIANS	1,250.00	1,000.00	0.00	250.00
			PI COSTS	15,000.00	12,000.00	0.00	3,000.00
			UNIVERSITY FUNDED	(25,250.00)	(20,000.00)	0.00	(5,250.00)
		100	<b>TOTAL</b>	<b>0.00</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>
	XXAG/432		<b>TOTAL</b>	<b>180,000.00</b>	<b>90,000.00</b>	<b>0</b>	<b>90,000.00</b>
<b>RG12349</b>			<b>TOTAL</b>	<b>180,000.00</b>	<b>90,000.00</b>	<b>0</b>	<b>90,000.00</b>

The Task Number is used to break the project down into smaller work areas if required. Where the award/project has a task 100 this is reserved for central processing to reflect the Non Direct Costs associated with the award.

Click on the **Award Number** again to view the expenditure by Expenditure Type, this is the lowest level budget heading.

RG12349 Award Status: ACTIVE						
Award Title: Incidence of Leptospirosis in the River Popple						
Award Start Date: 1 July 2008 Award End Date: 30 June 2013 Award Close Date: 31 August 2013						
Award Number	Project Show Code	Task Number	Expenditure Category	Expenditure Type	Commitment Number	Amount
RG12349	<a href="#">XXAG/432</a>	1	OTHER COSTS	OTHER COSTS/MISCELLANEOUS		0.00
			<b>OTHER COSTS</b>			<b>0.00</b>
			STAFF COSTS	COLLEGE FEES		40,000.00
				STUDENT MAINTENANCE		50,000.00
			<b>STAFF COSTS</b>			<b>90,000.00</b>
			TRAVEL AND SUBSISTENCE	TRAVEL/FOREIGN		0.00
			<b>TRAVEL AND SUBSISTENCE</b>			<b>0.00</b>
		<b>1</b>				<b>90,000.00</b>
		100	ESTATES COSTS	ESTATES COSTS - CHEST		2,500.00
				ESTATES COSTS - DEPT		500.00
			<b>ESTATES COSTS</b>			<b>3,000.00</b>
			INDIRECT COSTS	INDIRECT COSTS - CHEST		3,000.00
				INDIRECT COSTS - DEPT		1,000.00
			<b>INDIRECT COSTS</b>			<b>4,000.00</b>
			INFRASTRUCTURE TECHNICIANS	INFRASTRUCTURE TECHS - CHEST		800.00
				INFRASTRUCTURE TECHS - DEPT		200.00
			<b>INFRASTRUCTURE TECHNICIANS</b>			<b>1,000.00</b>
			PI COSTS	PI COSTS - CHEST		10,000.00
				PI COSTS - DEPT		2,000.00
			<b>PI COSTS</b>			<b>5,706.43</b>
			UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHEST		(16,300.00)
				UNIVERSITY FUNDED - DEPT		(3,700.00)
			<b>UNIVERSITY FUNDED</b>			<b>(20,000.00)</b>
		<b>100</b>				<b>0.00</b>
	XXAG/432					<b>90,000.00</b>
RG12349						<b>90,000.00</b>

For a listing of expenditure items and commitments click on the **Project Code**. Expenditure items are displayed in date order within each Expenditure Type.