Creating a Grants Enquiry Portal Page

Within Cognos you will automatically have a Public Folder and a My Folders set up.

If you are mainly using Cognos for running Grants reports then you can add a Grants Enquiry tab to your screen.

A Grants Enquiry tab is useful as it enables grants administrators to view the information that Principle Investigators (PIs) see when they login to Cognos, the PI Grants Enquiry report.

Accessing the PI report

1. Having logged in, go to Public Folders, click on the Live folder link.

2. Click on Page Tabs folder towards the bottom of the list to display the two options as per screen shot.

3. Click in the box on the left for Grants Enquiry.

4. To add this to your Cognos pages/tabs, click on the More... action button at the far right hand side for the Grants Enquiry line and click Add to my portal tabs.

5. A third tab (Grants Enquiry) will appear on your screen.

6. To access the PI reports, click on the Grants Enquiry page tab, Reports tab.

7. 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.
8. A listing of PI 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 drill down from the summary view to the **Expenditure Category** (budget heading). The budget and expenditure figures will be **cumulative** from the start of the award.
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.

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

NB: When you drilldown, each lower level report will open in a new tab in your browser and can be closed after viewing. Cognos remains open on the PI Grants Enquiry tab until you return and close/log off.