



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.

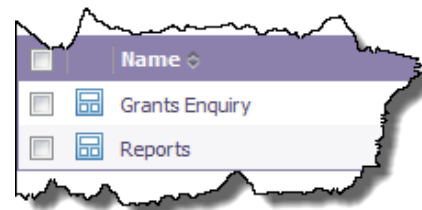
A **Grants Enquiry** tab is useful as it enables grants administrators to view the information that Principle Investigators (PIs) see when they login to Cognos, the PI Grants Enquiry report.

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**.

PI Grants Enquiry

Please Select a Award Organisation: *

- 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.

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



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
RG12349	XXAG/432	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
		1		180,000.00	90,000.00	0	90,000.00
		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		0.00	0.00	0	0.00
	XXAG/432			180,000.00	90,000.00	0	90,000.00
RG12349				180,000.00	90,000.00	0	90,000.00

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 Short Code	Task Number	Expenditure Category	Expenditure Type	Commitment Number	Amount
RG12349	XXAG/432	1	OTHER COSTS	OTHER COSTS/MISCELLANEOUS		0.00
			OTHER COSTS			0.00
			STAFF COSTS	COLLEGE FEES		40,000.00
				STUDENT MAINTENANCE		50,000.00
			STAFF COSTS			90,000.00
			TRAVEL AND SUBSISTENCE	TRAVEL/FOREIGN		0.00
			TRAVEL AID SUBSISTENCE			0.00
						90,000.00
		100	ESTATES COSTS	ESTATES COSTS - CHEST		2,500.00
				ESTATES COSTS - DEPT		500.00
			ESTATES COSTS			3,000.00
			INDIRECT COSTS	INDIRECT COSTS - CHEST		3,000.00
				INDIRECT COSTS - DEPT		1,000.00
			INDIRECT COSTS			4,000.00
			INFRASTRUCTURE TECHNICIANS	INFRASTRUCTURE TECHS - CHEST		800.00
				INFRASTRUCTURE TECHS - DEPT		200.00
			INFRASTRUCTURE TECHNICIANS			1,000.00
			PI COSTS	PI COSTS - CHEST		10,000.00
				PI COSTS - DEPT		2,000.00
			PI COSTS			5,706.43
			UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHEST		(16,300.00)
				UNIVERSITY FUNDED - DEPT		(3,700.00)
			UNIVERSITY FUNDED			(20,000.00)
						0.00
	XXAG/432					90,000.00
RG12349						90,000.00

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

Grants Transactions										
Project Short Code	Expenditure Category	Expenditure Type	Award Number	Task Number	Expenditure Comment	Supplier Name	Invoice Number	Expenditure	Commitment Amount	GL Date
XXAG/432	STAFF COSTS	COLLEGE FEES	RG12349	1	COLLEGE FEES BALANCE/CORR	COLLEGE	Smith 09/10 BALANCE	100.00	0.00	1 Feb 2011
XXAG/432	STAFF COSTS	COLLEGE FEES	RG12349	1	COLLEGE FEES - Smith	CHRIST'S COLLEGE	SLS00005439	5,694.00	0.00	13 Oct 2010
XXAG/432	STAFF COSTS	COLLEGE FEES	RG12349	1	2009/10 FEES - Smith	CHRIST'S COLLEGE	2009/10 FEES	5,474.00	0.00	6 Oct 2009
XXAG/432	STAFF COSTS	COLLEGE FEES	RG12349	1	SMITH COLLEGE FEES	CHRIST'S COLLEGE	FEES 2008/9SMITH	5,427.00	0.00	1 Jan 2009
		COLLEGE FEES						16,695.00	0.00	
XXAG/432	STAFF COSTS	STUDENT MAINTENANCE	RG12349	1	CHRIS: 1 20009999 SMITH PRXXAG/432.01.RG12349.			1,132.50	0.00	30 Jun 2011
XXAG/432	STAFF COSTS	STUDENT MAINTENANCE	RG12349	1	CHRIS: 1 20009999 SMITH PRXXAG/432.01.RG12349.			1,132.50	0.00	31 May 2011
XXAG/432	STAFF COSTS	STUDENT MAINTENANCE	RG12349	1	CHRIS: 1 20009999 SMITH PRXXAG/432.01.RG12349.			1,132.50	0.00	30 Apr 2011
		STUDENT MAINTENANCE						36,422.46	0.00	
		STAFF COSTS						53,117.46	0.00	
XXAG/432	TRAVEL AND SUBSIS	TRAVEL/FOREIGN	RG12349	1	EXPERIMENTS at Poppleton - EXP JONES, MR D		EXP19/07/10	(165.58)	0.00	1 Sep 2010
XXAG/432	TRAVEL AND SUBSIS	TRAVEL/FOREIGN	RG12349	1	EXPERIMENTS at Poppleton - EXP JONES, MR D		EXP19/07/10	165.58	0.00	19 Jul 2010
		TRAVEL FOREIGN						0.00	0.00	
		TRAVEL AID SUBSISTENCE						0.00	0.00	
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	30 Jun 2011
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	31 May 2011
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	30 Apr 2011
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	31 Mar 2011
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	28 Feb 2011
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	31 Jan 2011
XXAG/432	UNIVERSITY FUNDED	UNIVERSITY FUNDED - CHE	RG12349	100	Expenditure For FEC Non Direct			(277.59)	0.00	31 Dec 2010

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.