

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

This 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 \rightarrow Run \rightarrow 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 Yes if you would like to include all <i>Closed</i> and <i>On Hold</i> awards.

Example

Parameters	×
Award Number	RG12345 ···
From Award Organisation	
To Award Organisation	
Principal Investigator	
Include Closed Awards	N No
	QK Clear Help

- 2. Once parameters have been entered, click on *OK* to display the *Submit Request* screen.
- 3. Click *Submit*, to display the *Requests* screen.

🖸 Submit Request	×
Run this Request	
	Сору
Name	GMS: Award Status Report By Dept or Award - Excel Version (UFS)
Operating Unit	and the second s
Plint a	
(Help (<u>C</u>)	Sub <u>m</u> it Ca <u>n</u> cel

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

<mark>0</mark> Requ	ests					
	Refres	h Data Find R	equests	Sub <u>m</u> it a	a New Request	Submit New Request Set
				Copy S	Single Request	Copy Reguest Set
Requ	iest ID	Name	Parent	Phase 🜡	Status	Parameters
24421	1591	GMS: Award Status Report	<u> </u>	Completed	Normal	RG12345, ZZ Ecology
24421		GMS: Expenditure by PA F		Completed	Normal	ZZ Ecology
2442		Deportmental Fired America	Jan Strange	Completed	Margan - Margan	AG.
			ew Detail <u>s</u>	R	er <u>u</u> n Request	View Output
	Cancel I	Request Di	agnostics	Repr	int/Republish (<u>J</u>)	View Log (<u>K</u>)

5. Click View Output.

Opening in excel

Internet Explorer	Firefox
You must click on Save or Save as. Do NOT click on Open at this point as this can cause the pivot tables in Excel not to calculate correctly.	Click on Open With ensuring the field populates with Microsoft Excel (default).
Internet Explorer What do you want to do with GMS_Award_Status_Report_By_De_140416.xls? Size:124 KB Type: Microsoft Excel 2003 From: udsfunc.admin.camac.uk Open The file won't be saved automatically. Save Save Save Cancel	Opening GMS_Award_Status_Report_By_De_140416.xls You have chosen to open: GMS_Award_Status_Report_By_De_140416.xls which is: Microsoft Excel 97-2003 Worksheet (322 kB) from: https://ufsfunc.admin.cam.ac.uk What should Firefox do with this file? © Open with Microsoft Excel (default) © Save File Do this <u>a</u> utomatically for files like this from now on.
Once download is complete, click on <i>Open</i> . An example report output is shown below. The GMS_Award_Status_Report_By_De_140416 (3).xls download has completed.	Click OK

NB: Refer to 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)

Tab 1: Report Information

	GMS: Award Status	Report By Dept or A	ward - Excel Versio	on (UFS)	
Report Date	15-Apr-16 11:18				
Parameters Entered					
Award Organisation - From					
Award Organisation - To					
Award Number	RG12345				
Award Manager					
Include Closed Award(s)?	N				
Notes:					
- This report excludes expen	ditures that have fail	ed funds checking			
- When printing please note t	hat the Award and Pr	oject summary tab	s have been configu	red to print in A3,	landscape format
 When printing please note t while the other tabs are confi 			s have been configu	ired to print in A3,	landscape format
			s have been configu	ired to print in A3,	landscape format
while the other tabs are confi	gured to print on A4.		Ĩ		·
while the other tabs are conf Reconciliation	gured to print on A4. Budget	Expenditure	Commitment	Total Cost	Funds Available
while the other tabs are confi Reconciliation Award Summary Tal	Budget	Expenditure 3,111,435.05	Commitment 18,857.23	Total Cost 3,130,292.28	Funds Available 2,628,826.72
while the other tabs are conf Reconciliation Award Summary Tal Data Tal	Budget 5,759,119.00 5,759,119.00	Expenditure 3,111,435.05 3,111,435.05	Commitment 18,857.23 18,857.23	Total Cost 3,130,292.28 3,130,292.28	Funds Available 2,628,826.72 2,628,826.72
while the other tabs are confi Reconciliation Award Summary Tal	Budget 5,759,119.00 5,759,119.00	Expenditure 3,111,435.05	Commitment 18,857.23	Total Cost 3,130,292.28	Funds Available 2,628,826.72
while the other tabs are conf Reconciliation Award Summary Tal Data Tal	Budget 5,759,119.00 5,759,119.00	Expenditure 3,111,435.05 3,111,435.05 0.00	Commitment 18,857.23 18,857.23 0.00	Total Cost 3,130,292.28 3,130,292.28 0.00	Funds Available 2,628,826.72 2,628,826.72 0.00
while the other tabs are conf Reconciliation Award Summary Tal Data Tal	Budget 5,759,119.00 5,759,119.00 0.00	Expenditure 3,111,435.05 3,111,435.05 0.00 the Reconciliation of	Commitment 18,857.23 18,857.23 0.00 checks above show	Total Cost 3,130,292.28 3,130,292.28 0.00 there are no differ	Funds Available 2,628,826.72 2,628,826.72 0.00 rences between
while the other tabs are conf Reconciliation Award Summary Tal Data Tal	Budget 5,759,119.00 5,759,119.00 0.00 Please ensure that the totals for the Av	Expenditure 3,111,435.05 3,111,435.05 0.00 the Reconciliation of ward Summary Tab	Commitment 18,857.23 18,857.23 0.00 checks above show	Total Cost 3,130,292.28 3,130,292.28 0.00 there are no differ	Funds Available 2,628,826.72 2,628,826.72 0.00 rences between
while the other tabs are conf Reconciliation Award Summary Tal Data Tal	Budget 5,759,119.00 5,759,119.00 0.00 Please ensure that	Expenditure 3,111,435.05 3,111,435.05 0.00 the Reconciliation of ward Summary Tab	Commitment 18,857.23 18,857.23 0.00 checks above show	Total Cost 3,130,292.28 3,130,292.28 0.00 there are no differ	Funds Available 2,628,826.72 2,628,826.72 0.00 rences between

Tab 2: Award Summary

Award Number	Award Organiation	Project Number(s)	Award Title	Sponsor	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		% budget spent
RG12345	ZZ_Ecology	ZZAG/123	DO PLANT VIRUSES COMPENSATE THEIR HOSTS BY HELPING ATTRACT POLLINATORS?	LEVERHULME TRUST		7 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%
() H	Report Information	on Awar	d Summary Project Summa	ary / By Task	. / By Task I	& Category 🖉 By Task,	Category 8	. Type 🖉 Data	a / 🔁 /									

Tab 3: Project Summary

Award Number	Project Number	Project Description	Award Sponsor	Budget	E≢penditure	Commitment	Total Cost	Funds Available	Start Date	End Date	Status	Months Left as % til of 14-Apr- elap 16		% budget spent
RG12345		DO PLANT VIRUSES	LEVERHULME TRUST											
		HOSTS BY HELPING ATTRACT POLLINATORS?		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 Inf	ormation / Award	Summary Project	Summary 🗶	By Task	By Task & Cate	egory 🖉 By	Task, Category	& Туре 🏒	Data 🦯 🔁 /	/			

Tab 4: By Task

Award Mana	ger (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
	ZZAG/123 Total	-	241,544.00	229,196.80	857.12	230,053.92	11,490.08
RG12345 Tota	al		241,544.00	229,196.80	857.12	230,053.92	11,490.08
Grand Total			241,544.00	229,196.80	857.12	230,053.92	11,490.08
► ► Repo	ort Information 📿 A	ward Summary / Project Summary	By Task 🗶	By Task & Cate	egory 🏑 By Tas	k, Category &	. Type 🏒 Data 🏒 🕈

Tab 5: By Task & Category

Award Manag	c. (,,	•							
					Data				
Award	T Project	🕂 Task 🖵	Task Na 🚽	Expenditure Category	J Budget	Expenditure	Commitments	Total Costs	Funds Available
	ZZAG/123	1	DIRECT CO	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	10,242.1
			DIRECT CO	STS Total	217,544.00	205,778.28	790.13	206,568.41	10,975.5
		2	Dr Peck	OTHER COSTS	24,000.00	23,418.50	66.99	23,485.49	514.5
			Dr Peck To	tal	24,000.00	23,418.50	66.99	23,485.49	514.5
		100	NON DIREC	ESTATES COSTS	48,322.00	45,165.86	0.00	45,165.86	3,156.1
				INDIRECT COSTS	149,446.00	139,684.88	0.00	139,684.88	9,761.1
				INFRASTRUCTURE TECHNICIANS	5 7,423.00	6,938.18	0.00	6,938.18	484.8
				PLCOSTS	0.00	0.00	0.00	0.00	0.0
				UNIVERSITY FUNDED	-205,191.00	-191,788.90	0.00	-191,788.90	-13,402.1
			NON DIREC	CT COSTS Total	0.00	0.02	0.00	0.02	-0.0
	ZZAG/123 Tot	al			241,544.00	229,196.80	857.12	230,053.92	11,490.0
RG12345 Tota					241,544.00	229,196.80	857.12	230,053.92	11,490.0
Grand Total					241,544.00	229,196.80	857.12	230,053.92	11,490.0

Award Ma	(All) 🔽									
						Data				
Award 🔟	Project 🚽	Tasl 🚽	Task Name 🖃	Expenditure Category	🗾 Expenditure Type	1 Budget	Expenditure	Commitments	Total Costs	Funds Available
	ZZAG/123	1	DIRECT COSTS	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	733.4
					Other Costs/Consumables		22,364.22	790.13	23,154.35	0.0
					Other Costs/Miscellaneous		112.25	0.00	112.25	0.0
				STAFF COSTS	-	193,544.00	0.00	0.00	0.00	10,242.1
					Stipends		163,473.37	0.00	163,473.37	0.0
					Wages		19,828.44	0.00	19,828.44	0.0
			DIRECT COSTS Total			217,544.00	205,778.28	790.13	206,568.41	10,975.5
		2	Dr Peck	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	514.5
					Other Costs/Consumables		22,896.09	66.99	22,963.08	0.0
					Other Costs/Miscellaneous		522.41	0.00	522.41	0.0
			Dr Peck Total			24,000.00	23,418.50	66.99	23,485.49	514.5
		100	NON DIRECT COSTS	ESTATES COSTS	-		0.00	0.00	0.00	3,156.1
					Estates Costs - Chest	31,892.52	29,809.46	0.00	29,809.46	0.0
					Estates Costs - Dept	16,429.48	15,356.40	0.00	15,356.40	0.0
				INDIRECT COSTS	-		0.00	0.00	0.00	9,761.1
					Indirect Costs - Chest	98,634.36	92,192.03	0.00	92,192.03	0.0
			and the second sec	and stranger	and the second secon	50.r 20, .	192.85	0.00	-	
					Juniversity Funded - Dept	-69.764.94	-65,208.23	0.00	-65,208.23	0.0
			NON DIRECT COSTS	Total	onversity runded - Dept	0.00	0.02	0.00	0.02	-0.0
	ZZAG/123	Total				241,544.00		857.12	230,053.92	11,490.0
G12345						241,544.00	229,196.80	857.12	230.053.92	11,490.0
rand To			Award Summary	Project Summary / By Task	. / Du Task 0. Ostanana	241 544 00 , Category & T	220 106 80	857 12	230 053 02	11 /100 0

Tab 6: By Task, Category & Type

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	t; Z	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	s		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 COST	ГS	ESTATES COSTS	-			0	0	0	3156.14
									Estates Costs - Chest		31892.52	29809.46	0	29809.46	0
									Estates Costs - Dept		16429.48	15356.4	0	15356.4	0
								INDIRECT COSTS	-			0	0	0	9761.12
هي ا	le met mas	J			_	يا هيون المسا		سليون الإير المحاد	Indirect Costs - Chest		98634.36	92192.03		92192.03	
1	i	1		1			< I		പസലം, പാം	Ξ.	<i></i> A	-⊥ .		0.0	0
									University Funded - Dept		-69764.94	-65208.23	0	-65208.23	0
					2	Dr Peck		OTHER COSTS	-		24000	0	0	0	514.51
									Other Costs/Consumables			22896.09	66.99	22963.08	0
									Other Costs/Miscellaneous	s		522.41	0	522.41	0
► N F	🕨 Report Information 🖉 Award Summary 🦯 Project Summary 🦯 By Task 🖉 By Task & Category 🤇 By Task, Category & Type 🕽 Data 😤 🖉														

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.

1. Once report has completed and opened into excel, 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.

1	Microsoft Excel						
	()	The workbook conversion to the current file format completed successfully. To use the new and enhanced features of the current file format, you must dose and reopen the workbook. Do you want to dose and reopen the workbook now?					
		Yes No					
1							