

GMS: Project Status Report by Dept or Project – Excel Version (UFS)

This report provides details on individual or all projects for a department, or PI, including those where the award funding the project is owned by a different department. The report produces one excel workbook with six worksheets of data. These include expenditure at project summary, task, category and type level.

Used for	Month and Year End monitoring for a range of Projects
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	
Project Number	Either complete with a project number held by your department or leave it blank
From Project Organisation	Enter or select your organisation from the list of values e.g. ZZ_Ecology
To Project 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 Projects	Change to Yes if you would like to include all Closed and On Hold awards.

2. Once parameters have been entered, click on **OK**.

3. The *Submit Request* screen displays. Click *Submit*.

Project Number	ZZAG/123	-	
From Project Organisation			
To Project Organisation			
Principal Investigator			
Include Closed Projects	N No		
	(■) 565		
	(OK	Cancel	Help
		guider) (cieda)	
_			
 Submit Request 			×
Run this Request		_	
			Сору
Name GMS: F	Project Status Report By Dept (or Project - Excel Version (UFS)	
Operating Unit			
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G PH	have		
Hala (C)		Submit	Cancel
		Subint	Calicer

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

Requests									
Refre	sh Data Find I	Requests	Sub <u>m</u> it	a New Request	Submit New Request Set				
			Copy S	Single Request	Copy Reguest Set				
Request ID	Nama	Parent		Obsture	Deventer				
	Name		nase 🔹 🗖	Status	Parameters				
24423348	GMS: Project Status Repo		ompleted	Normal	ZZAG/123 , , , N, Y, NO, Y, M				
24421591	CMS Award Status Repor		ompleted	Normal	RG79460, PD_Plant Offices				
Hgld Request View Details Rerun Request View Output									
Cancel	Request	Diagnostics	Rep	rint/Republish (J)	View Log (K)				

5. Click View Output.

Opening in excel

Internet Explorer	Firefox
You must click on <i>Save</i> or <i>Save as.</i> Do NOT click on <i>Open</i> 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 K8 Type: Microsoft Excel 2003 From: ulfsfunc.admin.cam.ac.uk Open The file won't be saved automatically. Save Save Save as	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 gutomatically 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 (Award Status section). This will make the file significantly smaller once converted to xlsx.

Example report output (individual project only)

Tab 1: Report Information

Report Name	GMS: Project Status R	eport By Dept or Pro	ject - Excel Version (I	JFS)							
Report Date	15-Apr-16 11:35										
Parameters Entered											
Project Organisation - From											
Project Organisation - To											
Project Number	Project Number ZZAG/123										
Principal Investigator											
Include Closed Project(s)?	N										
Notes: - This report excludes expend - When printing please note th configured to print on A4.	itures that have failed hat the Project tab has	funds checking been configured to _l	print in A3, landscape	format while the o	ther tabs are						
Reconciliation	Budget	Expenditure	Commitment	Total Cost	Funds Available						
Project Tab	241,544.00	229,204.00	857.12	230,061.12	11,482.88						
Data Tab	241,544.00	229,204.00	857.12	230,061.12	11,482.88						
Difference	0.00	0.00	0.00	0.00	0.00						
	Please ensure that the for the Project Tab an	e Reconciliation che d Data Tab. If there a	cks above show there are differences please	e are no differences e save the output b	between the totals efore opening.						

Tab 2: Project

Project Number	Close Date	Project Organisation	Pl Name(s)	Budget	Expenditure	Commitment	Total Cost	Funds Available	Start Date	End Date	Status	Months Left as of 14-Apr-16	% Time Elapsed	% Budget Spent
ZZAG/123	30-NOV-18	PD_Plant Sciences	Parker, Professor H (PI)	2,383,733.47	1,205,051.20	6,754.56	1,211,805.76	1,171,927.71	01-Oct-12	30-Sep-18	Active	29	59%	51%
() N Repo	ort Information	Project By Ta	sk 🖉 By Task & Cate	gory 🖉 By Ta	sk Category & T	ype / Data /	/१			1				

Tab 3: By Task

PI	(All)	V						
			Data					
Project 🔟	Task Number	🚽 Task Name	🕶 Budget	Expenditure	Commitment	Total Cost	Funds Available	%Spent
ZZAG/123		1 HOLDING ACCOUNT	21,000.00	1,875.94	0.00	1,875.94	19,124.06	9%
		4 EXTERNAL ROTATIONS	24,000.00	18,949.00	0.00	18,949.00	5,051.00	79%
		15 UNIVERSITY & COLLEG	E 1,772,890.00	884,388.81	0.00	884,388.81	888,501.19	50%
		20 OTHER COSTS	47,500.00	35,095.42	0.00	35,095.42	12,404.58	74%
ZZAG/123 To	otal		1,865,390.00	940,309.17	0.00	940,309.17	925,080.83	50%
Grand Total			1,865,390.00	940,309.17	0.00	940,309.17	925,080.83	50%
I ▶ ▶ Rep	ort Information 🏒	Project By Task By Task	k & Category 🏒 I	By Task Catego	ry & Type 🖉 Da	ata 🦯 🔁 🦯		

Tab 4: By Task & Category

PI	(All)	•							
				Data					
Project 🗈	Task Numb	📲 Task Name	🕶 Expenditure Category 🛛 🖵	Budget	Expenditure	Commitment	Total Cost	Funds Available	%Spent
ZZAG/123		1 HOLDING ACCOUNT	OTHER COSTS	21,000.00	1,875.94	0.00	1,875.94	19,124.06	9%
			STAFF COSTS	0.00	0.00	0.00	0.00	0.00	0%
		4 EXTERNAL ROTATIONS	OTHER COSTS	24,000.00	18,949.00	0.00	18,949.00	5,051.00	79%
			STAFF COSTS	0.00	0.00	0.00	0.00	0.00	0%
	1	15 UNIVERSITY & COLLEGE	COLLEGE COSTS	0.00	0.00	0.00	0.00	0.00	0%
			OTHER COSTS	0.00	0.00	0.00	0.00	0.00	0%
			STAFF COSTS	1,772,890.00	884,008.81	0.00	884,008.81	888,881.19	50%
			TRAVEL AND SUBSISTENCE	0.00	380.00	0.00	380.00	-380.00	0%
	1	20 OTHER COSTS	OTHER COSTS	47,500.00	31,695.42	0.00	31,695.42	15,804.58	67%
			STAFF COSTS	0.00	3,400.00	0.00	3,400.00	-3,400.00	0%
ZZAG/123 T	otal			1,865,390.00	940,309.17	0.00	940,309.17	925,080.83	50%
Grand Tota	I			1,865,390.00	940,309.17	0.00	940,309.17	925,080.83	50%
Rep	oort Informatior	n 🖉 Project 🖉 By Task 🔒 🖪	y Task & Category / By Task (Category & Type	e 🖉 Data 🏾 🎘	1/			(

Tab 5: By Task, Category & Type

PI	(All)	¥							
					Data				
Project 🔟	Task Numb	📲 Task Name	Expenditure Category	Expenditure Type	Budget	Expenditure	Commitment	Total Cost	Funds Available
ZZAG/123		1 HOLDING ACCOUNT	OTHER COSTS	-	21,000.00	0.00	0.00	0.00	19,124.06
				Other Costs/Consumables	0.00	80.00	0.00	80.00	0.00
				Other Costs/Miscellaneous	0.00	1,795.94	0.00	1,795.94	0.00
			STAFF COSTS	-		0.00	0.00	0.00	0.00
				College Fees	0.00	0.00	0.00	0.00	0.00
				Student Maintenance	0.00	0.00	0.00	0.00	0.00
				University Fees	0.00	0.00	0.00	0.00	0.00
	1 Total				21,000.00	1,875.94	0.00	1,875.94	19,124.06
		4 EXTERNAL ROTATIONS	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	5,051.00
				Other Costs/Consumables	0.00	12,625.00	0.00	12,625.00	0.00
				Other Costs/Miscellaneous	0.00	6,324.00	0.00	6,324.00	0.00
			STAFF COSTS			0.00	0.00	0.00	0.00
				College Fees	0.00	0.00	0.00	0.00	0.00
				Student Maintenance	0.00	0.00	0.00	0.00	0.00
	4 Total				24,000.00	18,949.00	0.00	18,949.00	5,051.00
	:	20 OTHER COSTS	OTHER COSTS		47,500.00	0.00	0.00	0.00	15,804.58
				Other Costs/Consumables	0.00	3,481.20	0.00	3,481.20	0.00
				Other Costs/Miscellaneous	0.00	28,214.22	0.00	28,214.22	0.00
			STAFF COSTS	-		0.00	0.00	0.00	-3,400.00
				Student Maintenance	0.00	3,400.00	0.00	3,400.00	0.00
	20 Total				47,500.00	35,095.42	0.00	35,095.42	12,404.58
ZZAG/123 T	otal				92,500.00	55,920.36	0.00	55,920.36	36,579.64
Grand Total	l				92,500.00	55,920.36	0.00	55,920.36	36,579.64
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Tab 6: Data

Project	TT PI	Task Numb 🚽	Task Name	🛙 Expenditure Catego 🗐	Expenditure Type 🖃	Budget	Expenditure	Commitment	Total Cost	Funds Available
ZZAG/123	Parker, Professor H	1	HOLDING ACCOUNT	OTHER COSTS	-	21000.00	0.00	0.00	0.00	19124.06
					Other Costs/Consumables	0.00	80.00	0.00	80.00	0.00
					Other Costs/Miscellaneous	0.00	1795.94	0.00	1795.94	0.00
				STAFF COSTS	-		0.00	0.00	0.00	0.00
					College Fees	0.00	0.00	0.00	0.00	0.00
					Student Maintenance	0.00	0.00	0.00	0.00	0.00
					University Fees	0.00	0.00	0.00	0.00	0.00
		4	EXTERNAL ROTATIONS	OTHER COSTS	-	24000.00	0.00	0.00	0.00	5051.00
					Other Costs/Consumables	0.00	12625.00	0.00	12625.00	0.00
					Other Costs/Miscellaneous	0.00	6324.00	0.00	6324.00	0.00
				STAFF COSTS	-		0.00	0.00	0.00	0.00
					College Fees	0.00	0.00	0.00	0.00	0.00
					Student Maintenance	0.00	0.00	0.00	0.00	0.00
		20	OTHER COSTS	OTHER COSTS	-	47500.00	0.00	0.00	0.00	15804.58
					Other Costs/Consumables	0.00	3481.20	0.00	3481.20	0.00
					Other Costs/Miscellaneous	0.00	28214.22	0.00	28214.22	0.00
				STAFF COSTS	-		0.00	0.00	0.00	-3400.00
					Student Maintenance	0.00	3400.00	0.00	3400.00	0.00
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