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 → Run → 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 Closed and On Hold awards.

Example

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

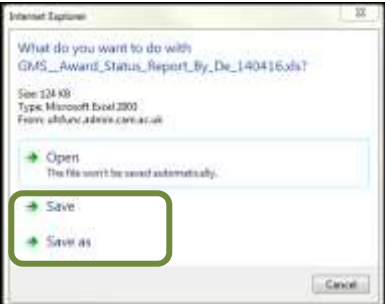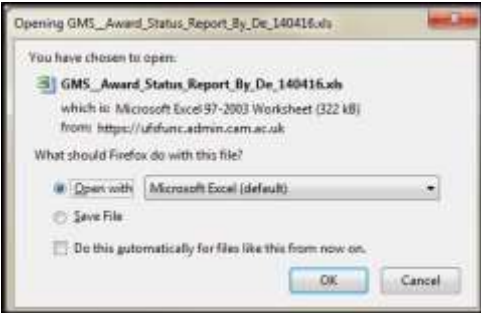3. Click **Submit**, to display the **Requests** screen.

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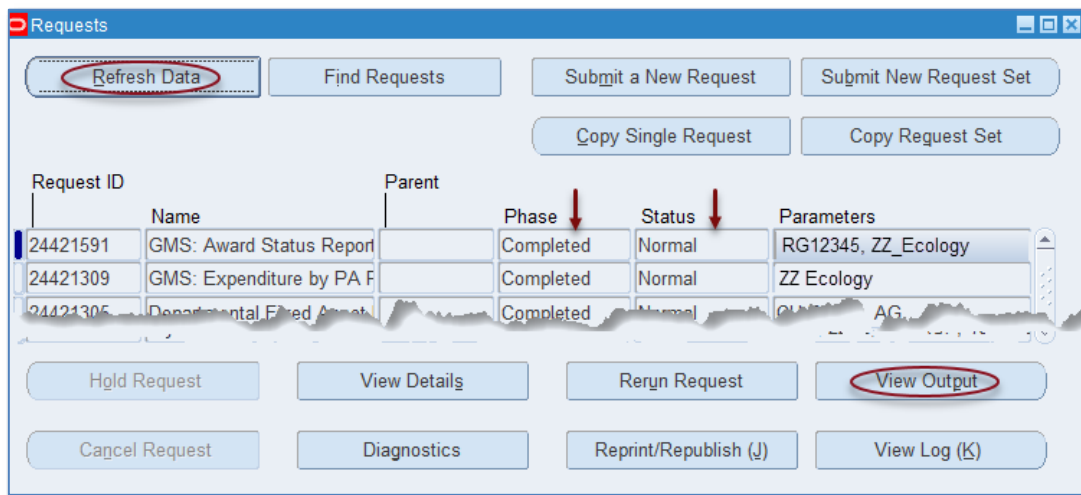
5. Click **View Output.**

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).**
Once download is complete**,** click on **Open.**	Click **OK**

Example report output (individual award only)

Tab 1: Report Information

Select **Enable Editing** and ensure that the **Difference** row is 0.00 for all columns.

Tab 2: Award Summary

Tab 3: Project Summary

Tab 4: By Task

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 Total				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

Award Manager (All)

Tab 5: By Task & Category

Award Manager (All)										

						Data				
Award	Project	Task	Task Na	Expenditure Category		Budget	Expenditure	Commitments	Total Costs	Funds Available
RG12345	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	10,242.19
				DIRECT COSTS Total		**217,544.00**	**205,778.28**	**790.13**	**206,568.41**	**10,975.59**
			2	Dr Peck	OTHER COSTS	24,000.00	23,418.50	66.99	23,485.49	514.51
				Dr Peck Total		**24,000.00**	**23,418.50**	**66.99**	**23,485.49**	**514.51**
			100	NON DIREC	ESTATES COSTS	48,322.00	45,165.86	0.00	45,165.86	3,156.14
					INDIRECT COSTS	149,446.00	139,684.88	0.00	139,684.88	9,761.12
					INFRASTRUCTURE TECHNICIANS	7,423.00	6,938.18	0.00	6,938.18	484.82
					PI COSTS	0.00	0.00	0.00	0.00	0.00
					UNIVERSITY FUNDED	-205,191.00	-191,788.90	0.00	-191,788.90	-13,402.10
				NON DIRECT COSTS Total		**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 Total						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

Report Information | Award Summary | Project Summary | By Task | **By Task & Category** | By Task, Category & Type | Data

Tab 6: By Task, Category & Type

Award Mi (All)										

							Data			
Award	Project	Task	Task Name	Expenditure Category	Expenditure Type	Budget	Expenditure	Commitments	Total Costs	Funds Available
RG12345	ZZAG/123	1	DIRECT COSTS	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	733.40
					Other Costs/Consumables		22,364.22	790.13	23,154.35	0.00
					Other Costs/Miscellaneous		112.25	0.00	112.25	0.00
				STAFF COSTS	-	193,544.00	0.00	0.00	0.00	10,242.19
					Stipends		163,473.37	0.00	163,473.37	0.00
					Wages		19,828.44	0.00	19,828.44	0.00
			DIRECT COSTS Total			**217,544.00**	**205,778.28**	**790.13**	**206,568.41**	**10,975.59**
		2	Dr Peck	OTHER COSTS	-	24,000.00	0.00	0.00	0.00	514.51
					Other Costs/Consumables		22,896.09	66.99	22,963.08	0.00
					Other Costs/Miscellaneous		522.41	0.00	522.41	0.00
			Dr Peck Total			**24,000.00**	**23,418.50**	**66.99**	**23,485.49**	**514.51**
		100	NON DIRECT COSTS	ESTATES COSTS	-		0.00	0.00	0.00	3,156.14
					Estates Costs - Chest	31,892.52	29,809.46	0.00	29,809.46	0.00
					Estates Costs - Dept	16,429.48	15,356.40	0.00	15,356.40	0.00
				INDIRECT COSTS	-		0.00	0.00	0.00	9,761.12
					Indirect Costs - Chest	98,634.36	92,192.03	0.00	92,192.03	0.00
					University Funded - Dept	-69,764.94	-65,208.23	0.00	-65,208.23	0.00
			NON DIRECT COSTS Total			**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 Total						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

Report Information | Award Summary | Project Summary | By Task | By Task & Category | **By Task, Category & Type** | Data

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;	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		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 COSTS	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
						Indirect Costs - Chest	98634.36	92192.03	0	92192.03	0
						University Funded - Dept	-89764.94	-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		522.41	0	522.41	0

Report Information | Award Summary | Project Summary | By Task | By Task & Category | By Task, Category & Type | **Data**