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

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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.**
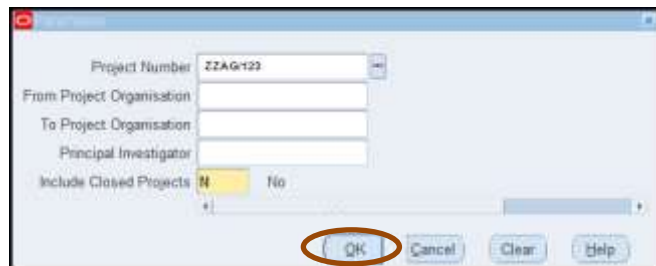
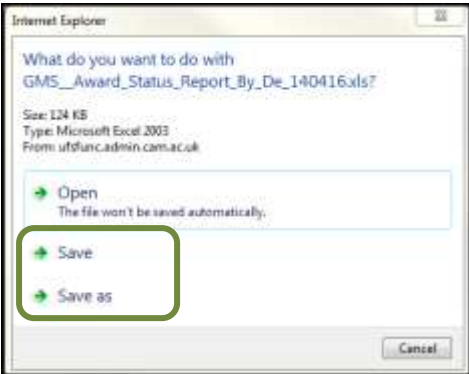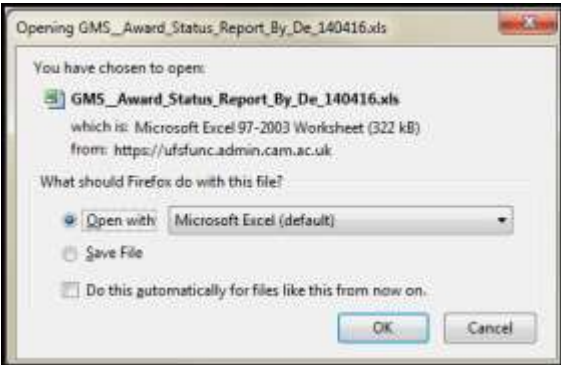3. The **Submit Request** screen displays. Click **Submit**.
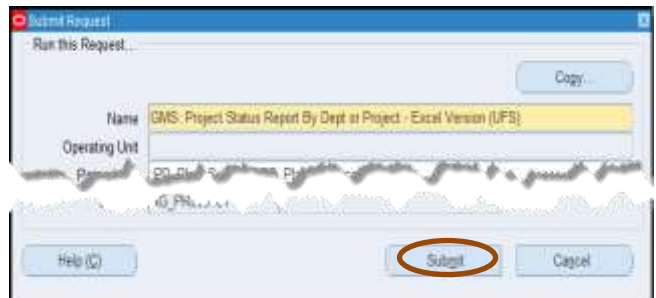
4. The **Requests** screen displays. Click on **Refresh Data**, until the **Phase** and **Status** shows as **Completed** and **Normal.**
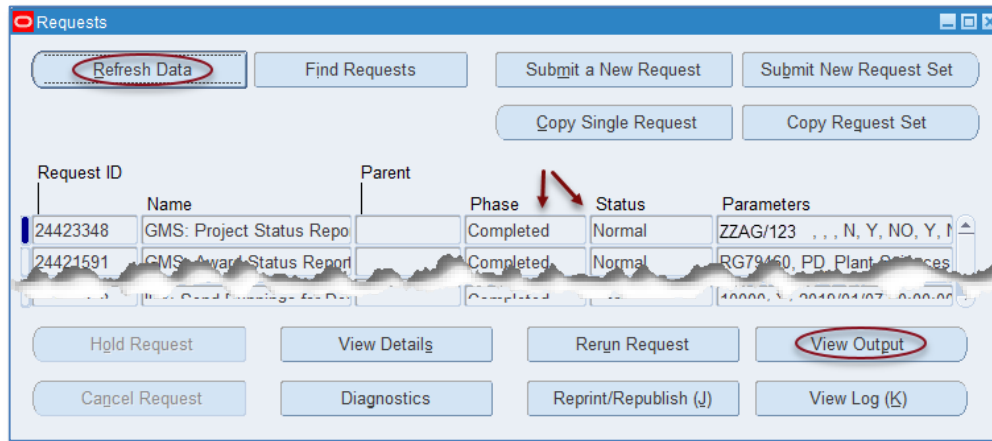
5. Click **View Output**.

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.** An example report output is shown below.	Click **OK**

Example report output (individual project only)

Tab 1: Report Information

NB: Ensure Difference = 0.00 for all columns (may need to select Enable editing)

Tab 2: Project

Tab 3: By Task

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 & COLLEGE	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 Total			**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%**

Tab 4: By Task & Category

PI   (All)

Project	Task Number	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%
	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%
	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 Total				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%

Report Information | Project | By Task | **By Task & Category** | By Task Category & Type | Data

Tab 5: By Task, Category & Type

PI   (All)

Project	Task Number	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	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	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	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 Total					92,500.00	55,920.36	0.00	55,920.36	36,579.64
Grand Total					92,500.00	55,920.36	0.00	55,920.36	36,579.64

Report Information | Project | By Task | By Task & Category | **By Task Category & Type** | Data

Tab 6: Data

Project	PI	Task Number	Task Name	Expenditure Category	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	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	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	0.00	-3400.00
					Student Maintenance	0.00	3400.00	0.00	3400.00	0.00

Report Information | Project | By Task | By Task & Category | By Task Category & Type | **Data**