This slide pack provides examples of the various screens that a typical user of the Research Grant Expenditure will encounter.

It is not intended as a user guide – it’s sole purpose is to showcase the various screens available and provide the reader with an idea of how to navigate the application via the various drill-down, tabs and menu options.
View Awards screen

- Option to View Awards or Projects
- Screen-level Help Text. Able to Show/Hide by clicking on title bar
- Filter options. Also able to show/hide
- Filter by End Date and/or Award Status
- Filter by PI, Sponsor or Department
- Glossary, FAQs and Help built in

Glossary, FAQs and Help built in

Budget, Expenditure, Commitment & Balance information clearly displayed

Drill down to next level of detail by clicking anywhere on row

Dates, Status & Months Left

Can show hide left hand pane via this button

Date of last CUFS data refresh

V1.0 created March 2014
### View Awards screen – with filters and side bar minimised

- **Click here to show side menu bar again**
- **Click here to view screen help**
- **Click here to view filter options**

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**Count of records returned**

**Go to next page if more than 10 values to display**

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**V1.0 created March 2014**

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#### Award List

<table>
<thead>
<tr>
<th>Award Title</th>
<th>Award Number</th>
<th>PI Name</th>
<th>Budget</th>
<th>Expenditure</th>
<th>Commits</th>
<th>Total Cost</th>
<th>Funds Available</th>
<th>Start Date</th>
<th>End Date</th>
<th>Close Date</th>
<th>Status</th>
<th>Months Left</th>
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</tbody>
</table>

**Count of records returned:** 11

**Go to next page if more than 10 values to display**

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**V1.0 created March 2014**
Option to View Awards or Projects

Screen-level Help Text. Able to Show/Hide by clicking on title bar

Filter options. Also able to show / hide Filter by End Date and/or Award Status

Filter by PI

Glossary, FAQs and Help built in

Filter options:
- Select Project End Date
  - All Projects
  - Within 12 Months
  - Within 6 Months
  - Within 3 Months
  - Within 1 Month

- Select Project Status
  - All
  - Active
  - At Risk
  - Pending Close
  - Unapproved
  - Approved
  - Submitted
  - Closed

Filter by PI

Drill down to next level of detail by clicking anywhere on row

Budget, Expenditure, Commitment & Balance information clearly displayed

Dates, Status & Months Left

V1.0 created March 2014
The Single Award Screen is accessed by drilling down from the All Awards view. It displays all Projects parented by the Award. Details are redacted to protect confidentiality. Users can drill down to the next level of detail by clicking anywhere on a row. The screen is part of the Research Grant Information Service (Expenditure) and was created in March 2014.
Single Project View – Expenditure Summary

- Accessed by drilling down on a Single Project
- Displays Task Level Summary
- No more drill-down. Further detail available via additional tabs instead
- Expenditure Category and Type can be accessed via the +/- signs
- ‘Fuel Gauge’ to show how much is left in the tank.

Manual Commitment information also visible here (where entered).

V1.0 created March 2014
Single Project View – Expenditure Detail

- Accessed via the ‘Expenditure Detail’ tab
- Allows filtering by TASK
- Lowest level of detail
- Filter by Expenditure Category
- Filter by Expenditure or Commitment (or show both)
- Filter by Expenditure Dates ‘From’ and ‘To’
- Details redacted

Research Grant Information Service (Expenditure)

Expenditure Summary

Filter Results

Expenditure Item Date | PA Date | Accounting Period | Expenditure Category |
----------------------|---------|--------------------|----------------------|
29 Jan 2014           | 31 Jan 2014 | JAN-14 | OTHER COSTS/CONSUMABLES |
29 Jan 2014           | 31 Jan 2014 | JAN-14 | OTHER COSTS |
29 Jan 2014           | 29 Feb 2014 | FEB-14 | OTHER COSTS/CONSUMABLES |
29 Jan 2014           | 29 Feb 2014 | FEB-14 | OTHER COSTS |

V1.0 created March 2014
PIs (and their delegates) are able to add manual commitments into the application against all Tasks and Expenditure Categories available on the Project. Any Manual Commitment information entered is stored within the application and is shown alongside the CUFS data (refreshed overnight).

The application has the intelligence to disregard any manual commitments for previous months and assumes that these will have been replaced by actual expenditure in CUFS – as per example above.

Start Date: May 2013
End Month: April 2014
Total Months: 12
Monthly Cost: £2,000
Total Initial Commitment: £24,000 (12 months @ £2,000 per month)
Months Left: 3 (in this example, February, March & April 2014)
Future Commitments: £6,000 (3 months @ £2,000 per month)

Once we get into the next month, the application will reduce the Months Left to 2, and the Future Commitments to £4,000.
Single Project View – Manual Commitments - ADD

Additional commitments are entered by clicking on ‘Add’

To Edit or Delete existing commitment, select the row first

Enter details of the manual commitment here – including:
1) Select Task (only Tasks available on the Project will be shown)
2) Select Expenditure Category. (only those available will be displayed)
3) Enter Name and Description
4) Select Start Month. (No need to select End Month – this is automatically calculated)
5) Enter Number of Months
6) Enter Monthly Cost
7) Save

IMPORTANT NOTE: Any manual commitment entered are only held within this application and are not pushed back into CUPS or any other system.

V1.0 created March 2014
The delegations capability allows the Award Manager (for Awards) and the Project Manager (for Projects) to delegate access to others at a per Project/Award level. There are three levels of delegation – as follows:

- **View Only.** Able to view record but unable to add or edit manual commitments.
- **Update.** Able to add or edit manual commitments, but unable to delegate to others.
- **Full.** Able to add/edit manual commitments and also delegate access to others.