This guide contains some very basic user information is designed to be used in conjunction with the on-line Screen Help, FAQs and Glossary accessible via the application. Tasks covered include:

- Accessing the application
- Viewing Awards
- Viewing Projects
- Viewing Expenditure Summary
- Viewing Expenditure Detail
- Viewing Manual Commitments
- Add / Edit / Delete Manual Commitments
- Delegation of Access
- Graphical Outputs
- View Standard Reports
Research Grant Expenditure Application – Logging In

Click on the ‘Log in via Raven’ button. This will take you to the Raven page and pass you back to the application once authenticated.

Key messages are displayed on the log-in screen, as appropriate.

NOTE: If you are unable to log in with your Raven ID, it is likely that you are not set up as a user for the application. Please contact your local research grant administrator for more information, or email Research_Expenditure_Support@admin.cam.ac.uk

www.expenditure.admin.cam.ac.uk
Research Grant Expenditure Application – Viewing Awards

To View Awards, click here

Screen Level Help text

Various Filter options – e.g. by End Date and Status. NOTE: Default view is all Active Awards

FAQs, Glossary, User Guides and Help Text available here

Date of last CUFS Data Refresh

Search/Filter by PI, Sponsor, Department, Title or Award No.

Drill down to view Projects by clicking anywhere on an Award record

Export data to CSV if required

Awards Titles, Numbers & PI Names redacted

Total records returned

Number of pages of records returned

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Research Grant Expenditure Application – Viewing Projects

- To View Projects, click here
- Screen Level Help text
- Various Filter options – e.g. by End Date and Status. NOTE: Default view is all Active Projects
- FAQs, Glossary, User Guides and Help Text available here
- Date of last CUFS Data Refresh
- Export data to CSV if required
- Search/Filter by PI, Title or Project no.
- Drill down to view Single Project Detail by clicking anywhere on a specific Project record
- Total records returned
- Number of pages of records returned

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Research Grant Expenditure Application – Viewing Expenditure Summary

Accessed by drilling down on a Single Project from ‘View Projects’ level

Screen Level Help text

Date of last CUFS Data Refresh

FAQs, Glossary, User Guides and Help Text available here

Manual Commitment information also visible here (where entered)

Displays Task Level Summary in ascending order

Expenditure Category and Expenditure Type can be accessed via the +/- signs at Task Level

‘Fuel Gauge’ to show how much is left in the tank for each Task.

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Accessed by drilling down on a Single Project from ‘View Projects’ level.

Allows filtering by TASK.

Filter by Expenditure Category.

Filter by Expenditure or Commitment (or show both).

Filter by Expenditure Dates ‘From’ and ‘To’.

Date of last CUFS Data Refresh.

FAQs, Glossary, User Guides and Help Text available here.

Export data to CSV.

Details redacted.
Research Grant Expenditure Application – View Manual Commitments

Accessed by drilling down on a Single Project from ‘View Projects’ level

Date of last CUFS Data Refresh

NOTE: This example was provided in May 2017.....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 2017
End Month: Oct 2017
Total Months: 6
Monthly Cost: £5,000

Total Initial Commitment: £30,000 (6 months @ £5,000 per month)
Months Left: 6 (in this example, May - Oct 2017)
Future Commitments: £30,000 (6 months left @ £5,000 per month)

Once we get into Jun 2017, the application will reduce the Months Left to 5, and the Future Commitments to £25,000

Add, Edit or Delete manual commitments here

Screen Level Help text

FAQs, Glossary and Help Text available here

Export to CSV

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Additional commitments are entered by clicking on ‘Add’.

To Edit or Delete existing commitment, select the relevant row first via the checkbox.

Edit or Delete commitments here

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

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

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.

Delegations screen is accessed under the Resources menu, next to Awards and Projects. Records available to delegate will be displayed in the ‘Resources’ tab. Able to search or filter for Awards/Projects to delegate. Filter on Award or Project. Active Only or All. Add or Remove delegates via these buttons.
Screen Level Help text

Graphical Outputs tab provides access to 3 different graphs

View graphs by clicking on relevant button
View Reports

Screen Level Help text

Reports tab provides access to 2 different reports

Run reports by clicking on relevant button

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