Summary Grant Reports for Units
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Summary Reports for Budget Officers will provide more comprehensive information for departmental decision making.

What kind of information are you looking for?
Research Accounting – Summary Grant Reports

- Which grants are active in my unit? And what are the project details?
- Do we have overspent grants or active grants that should have ended years ago?
- How much money has our department received from NSERC this year? (or last year?)
- How much money does Professor Jones have left to spend on research projects this year?
- Can I just get this information as data so I can do my own sorting and analysis?
Argos is a new reporting tool

Formatted reports and CSV reports (export data to Excel)

Four main filtering options:
- Organization (on all reports)
- Researcher
- Agency
- Fund

Additional filters:
- FAST closing balance
- Project end date
Research Accounting – Running Reports

1. Log into ARGOS and choose your report.
2. Select one or multiple departments – click on arrows
Research Accounting – Running Reports

3. Select one or multiple organizations
4. Select the reporting period, click on arrows
Research Accounting – Running Reports

5. Refine your search further if needed

6. Choose Next to run your report
7. Choose the report viewing option:

- Preview: Preview this report
- Save to File: Click this button to choose from a variety of formats to save the report.
- Email: Save the report to a temporary file and then email the file to one or more recipients
- Print: Print the report to a local printer
Research Accounting – Formatted Reports

1. Analysis of Grants by Agency

- Grouped and summed by fund “source” (eg Federal Govt, Provincial Govt, Foundations and Associations).
- Summed by agency including opening balance, revenue, expenses and closing balance (not including commitments).
- Sorted by researcher and then default organization.

Should help to fill out your budget submission:

- How much money has our department received from NSERC this year?
Research Accounting – Formatted Reports

2. Grant Details Summary

- Grouped by organization – can print and distribute.
- Details of all active grants in your unit – most of which is only available in Banner or My Research Tools.
- Sorted by researcher then by agency

  *Which grants are active in my unit? And what are the project details? Are they set up in the correct org?*

  *Do we have overspent grants or active grants that should have ended years ago?*
Research Accounting – Formatted Reports

3. Grant Details by Organization

- Grouped by organization – can print and distribute.
- Summed by researcher including ending balance and commitments.
- Total “net worth” of research funds by PI and by organization.

  How much money does Professor Jones have left to spend on research projects this year?
  
  How much have we spent as a unit on research? How much is left with and without commitments?
  
  Who to contact in Financial Services with questions?
4. CSV (Excel) Reports

Can I just get this information as data so I can do my own sorting and analysis?
Research Accounting - Summary

How is this different from FAST and Monthly Reports?

- No Fund-Org security
- Only summarized information (no expense details)
- Only year to date financial information
- Time to process the data
- Only active funds - funds with no balance or no net activity will not be included in the report
- No need to wait for monthly reports or find last month’s reports
- Much of the information only available in Banner and MRT is now available in one place!
Research Accounting – Next Steps

What’s Next?

- Need to be set up with an Argos userid.
- On-line training will be available or one-on-one by request.
- Flexibility to create new reports in the future.
Contact Information

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Questions