The Investigator Grant Report provides an overview of the budget and spend against a grant or grant group, as well as details of staff costs and individual transactions during a specific time period.

**Overview**

There are 4 tabs at the top of the report. The Intro tells you the version of the report that you are looking at, when the data was extracted from the database, and when the report was last refreshed.

The Help tab gives guidance on how to use the report – such as how to make selections and how to search.

The Definitions tab allows you to view the column headers in the report with a description.

The information returned by the report will be shown on the Summary tab. This contains six sections that can be viewed by clicking on the appropriate titles:

**Summary by Location**: Shows the budget, expenditure and commitments for the grant(s) selected from the grant start date to the selected end date. You are able to drill down into this data to see breakdowns by Location, Cost Category and Sub Cost Category.

**Staff Items**: show detailed breakdowns of salary payments within the selected start and end dates.

**Expenditure/Commitments/Income**: shows a detailed breakdown of all transactions against the grant within the selected start and end dates.

**Summary by Sub Grant Number** (WBS): Shows the budget, expenditure and commitments for the grant(s) selected from the grant start date to the selected end date. You are able to drill down into this data to see breakdowns by WBS, Cost Category and Sub Cost Category.

**A step by step guide.**

1. Log in to the KRISTAL system here: https://selfservice.mais.leeds.ac.uk:444/irj/portal or use the link on the Staff home page: http://www.leeds.ac.uk/forstaff/

2. Select:

3. Select Investigator Grant Report

You can also get directly to the report access point by following this link:

https://qlikview.leeds.ac.uk/qlikview/index.htm

4. Upon opening the report, you will automatically be taken to the Summary tab, on the Summary by Location section:
5. Here you will get a list of all your grants with the budget, expenditure, commitments, total spend and balance available.

The system will automatically default to the previous month and the current year.

You can select any month and year you wish by clicking on the dropdown arrow next to the start and end date fields. If you select the current month, the report will show data up to the day before you are viewing the report.

6. Unless you are an approver within KRISTAL, the system will automatically restrict the report to show just those grants that you are associated with as either a PI or Co-I.

7. To look at a grants data in more detail, you can click on the grant number/name. To go into more detail, you can click on any of the options in the first column on the summary screens.

You are able to filter the data further by clicking anywhere in the staff, expenditure, commitments and income tabs.

8. The header at the top of the report shows information for the grant or grant group you are looking at. If anything is blank, it means that there is more than one option available (e.g. for co-location grants).

9. You can either click the back/undo button to go back to your previous selection, or click the clear all button to remove all selections – which will take you back to the first list of grants.

To go back, you can also use the “drill” button to drill back up through the data.

10. You can view a detailed breakdown of salary payments by clicking on the Staff Items header. Information is only displayed for the selected dates.

11. You can view Expenditure, Commitments or Income Items by clicking on those headers. Again, transactions are only displayed for the selected dates.

12. You can also view the data by Sub-Grant number (or WBS number). This is useful where a grant may have different strands such as an EU grant, or different funders. To do this, you use “Summary by Sub Grant Number”.

13. You can print reports from the top of the screen by clicking on the button. You can either print the summary of all your grants or the full detail of a grant individually.

Alternatively you can export the reports to excel by selecting the Excel button in the top right hand corner of each table.

14. Selections are displayed in the top left hand corner of this screen:

You can use the rubber to remove any selections that are not required.

Research Administration Support:

If you require assistance with any aspects of the KRISTAL system, in the first instance please contact your local Faculty Research and Innovation Office.