Create a PI Report Run Control

The HE PI Report will summarize the budget, current expenditures, encumbrances and cumulative expenditures for a project and/or an award. A PI Report run control only needs to be created once and may be used when running PI Reports at any time.

Navigation: Grants > Interactive Reports > HE PI Report

1. Select Add a New Value



2. In the **Run Control ID** field, enter a name for your run control such as the name of the report and your initials, example: pi_report_fl.



3. Click Add.

Run a Pl Report

1. Select the following fields:

Business Unit: UND01

As of Date: All expenditures posted as of this date.

Active Project Status Only: Yes or No – pull only active or inactive projects.

Active Award Status Only: Yes or No – pull only active or inactive awards.

Run By: Choose one below

1. Award: all projects under an award

2. Sponsor: all projects by a specific sponsor id

3. Project Department: all projects by department

4. Award PI: all awards by a specific empl id

5. Project PI: all projects by a specific empl id

6. Project: by specific project number

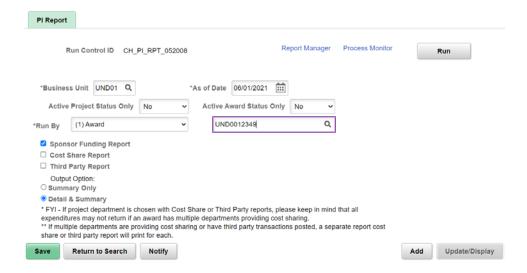
Report Type: Check one or more below

- 1. Sponsor Funding Report: detail for sponsored funds
- 2. Cost Share Report: detail for local or appropriated funds tracked as cost share
- 3. Third Party Report: detail for third party in-kind funds

Output Option: Click one below

- 1. Summary Only: award detail summarized into one report
- 2. Detail & Summary: detail by project and award detail summarized into one report

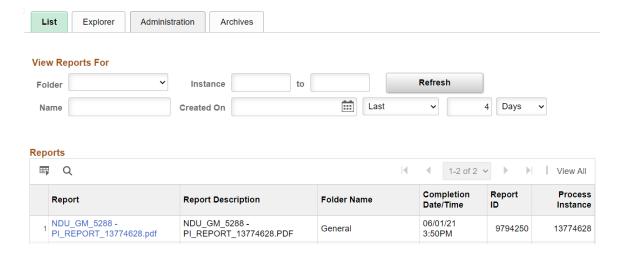
Example:



- 2. Click Save.
- 3. Click Run.
- 4. Click OK.



- 5. Click Process Monitor.
- 6. Click Refresh until the Run Status is "Success" and the Distribution Status is "Posted."
- 7. Click Report Manager.
- 8. Click NDU_GM_5288 PI REPORT hyperlink.



9. Click PI REPORT hyperlink.