

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**

The screenshot shows the 'HE PI Report' interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted in green. Below these buttons is a text input field labeled 'Run Control ID'. Underneath the input field is a green button labeled 'Add'. At the bottom of the interface, there are two links: 'Find an Existing Value' and '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.

This screenshot is identical to the previous one, but the 'Run Control ID' text input field now contains the text 'pi_report_fl'. The 'Add' button remains highlighted in green.

3. Click **Add**.

Run a PI 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:

PI Report

Run Control ID CH_PI_RPT_052008 Report Manager Process Monitor Run

*Business Unit *As of Date

Active Project Status Only Active Award Status Only

*Run By

Sponsor Funding Report
 Cost Share Report
 Third Party Report

Output Option:
 Summary Only
 Detail & Summary

* FYI - If project department is chosen with Cost Share or Third Party reports, please keep in mind that all expenditures may not return if an award has multiple departments providing cost sharing.
** If multiple departments are providing cost sharing or have third party transactions posted, a separate report cost share or third party report will print for each.

Save Return to Search Notify Add Update/Display

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

Process Scheduler Request
✕

[Help](#)

User ID chassi.herman Run Control ID CH_PI_RPT_052008

Server Name

Recurrence

Time Zone

Run Date

Run Time

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	NDU_GM_5288	NDU_GM_5288	BI Publisher	Web	PDF	Distribution

OK
Cancel

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.

List
Explorer
Administration
Archives

View Reports For

Folder Instance to **Refresh**

Name Created On Last 4 Days

Reports

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 NDU_GM_5288 - PI_REPORT_13774628.pdf	NDU_GM_5288 - PI_REPORT_13774628.PDF	General	06/01/21 3:50PM	9794250	13774628

9. Click **PI REPORT** hyperlink.