

## 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**

**HE PI Report**

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID

[Add](#)

[Find an Existing Value](#) | [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.

**HE PI Report**

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

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:

The screenshot shows a web application interface for running a PI Report. At the top, there is a green tab labeled 'PI Report'. Below the tab, the 'Run Control ID' is 'CH\_PI\_RPT\_052008'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The form contains several fields: 'Business Unit' is 'UND01', '\*As of Date' is '06/01/2021', 'Active Project Status Only' is 'No', and 'Active Award Status Only' is 'No'. The 'Run By' dropdown is set to '(1) Award', and the search field contains 'UND0012349'. Under 'Report Type', 'Sponsor Funding Report' is selected. Under 'Output Option', 'Detail & Summary' is selected. There are also 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display' buttons.

Run Control ID CH\_PI\_RPT\_052008 Report Manager Process Monitor Run

\*Business Unit UND01 \*As of Date 06/01/2021

Active Project Status Only No Active Award Status Only No

\*Run By (1) Award UND0012349

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**.

X
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	<a href="#">Distribution</a>

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

Name  Created On  Last  Days

**Reports**

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

9. Click **PI REPORT** hyperlink.