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**

   ![Add a New Value](image1)

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`.

   ![Run Control ID](image2)

3. Click **Add**.

   ![Add](image3)
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 example](image_url)
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.