

PI Report

The HE PI Report will summarize the budget, current expenditures, encumbrances, and cumulative expenditures for an award or project under a Principal Investigator (PI).

To access the HE PI Report in [PeopleSoft Finance](#), log in and click on the NavBar icon  located in the upper right corner. From there, select Menu and scroll down to Grants. Click on Interactive Reports to find the HE PI Report.

If you do not have access to PeopleSoft Finance, please click on the following link to learn how to obtain access: <https://campus.und.edu/finance/finance-access-request.html>.

1. Complete the following fields. All fields with an asterisk (*) are required.

*Business Unit:	UND01
*As of Date:	All expenditures posed as of this date
Active Project Status Only:	Select Yes or No (pull only active or inactive projects)
Active Award Status Only:	Select Yes or No (pull only active or inactive awards)
*Run By:	Choose one option from the dropdown menu:
	(1) Award (2) Sponsor (3) Project Department (4) Award PI (5) Project PI (6) Project

PI Report

Run Control ID PI_REPORT
Report Manager Process Monitor
Run

*Business Unit

Active Project Status Only

*Run By

*As of Date

Active Award Status Only

Refresh Grid

* 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.

Report Type:

Check one or more of the following options:

- Sponsored Funding Report (detail for sponsored funds)
- Cost Share Report (detail for local or appropriated funds tracked as cost share)
- Third Party Report (detail for third party in-kind funds)

*Run By (1) Award Refresh Grid

Award	
1	<input type="text" value=""/>

- Sponsor Funding Report
 Cost Share Report
 Third Party Report

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Output Option:

Choose one of the following options:

- Summary Only
- Detail & Summary
- Totals Only

Summarize by Award:

Check this option to summarize report by award

- Output Option:
 Summary Only
 Detail & Summary
 Totals Only Summarize by Award

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2. Click **Save**.
3. Click **Run**.

Run Control ID PI_REPORT

Report Manager Process Monitor

4. Select **PDF** or **XLS Format** in **Process Scheduler Request** and click **OK**.

Process Scheduler Request x

[Help](#)

User ID jackie.pic Run Control ID PI_REPORT

Server Name Run Date 12/01/2023

Recurrence Run Time 2:33:40PM [Reset to Current Date/Time](#)

Time Zone

Process List

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

[OK](#) [Cancel](#)

5. Click **Process Monitor**.

Run Control ID PI_REPORT

[Report Manager](#) [Process Monitor](#) [Run](#)

6. Click **Refresh** until the Run Status reads **Success**, and the Distribution Status reads **Posted**.

[Process List](#) [Server List](#)

View Process Request For

User ID jackie.pic Type Last 1 Days [Refresh](#)

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	15715256		BI Publisher	NDU_GM_5288	jackie.pic	12/01/2023 3:55:39PM CST	Success	Posted	Details	Actions

[Go back to HE PI Report](#)

[Save](#) [Notify](#)

Process List | [Server List](#)

7. Click **Report Manager**.

[Process List](#) [Server List](#)

View Process Request For

User ID jackie.pic Type Last 1 Days [Refresh](#)

Server Name Instance From Instance To [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

8. Click the hyperlink of the desired report.

[List](#) [Explorer](#) [Administration](#) [Archives](#)

View Reports For

Folder Instance to [Refresh](#)
Name Created On Last 1 Days

Reports

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 NDU_GM_5288 - PI_RÉPORT_15715256.pdf	NDU_GM_5288 - PI_RÉPORT_15715256.PDF	General	12/01/23 3:56PM	11100676	15715256