

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 <u>PeopleSoft Finance</u>, 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 C	Control ID PI_REPORT Report Manager Process Monitor	Run
*Business U	Unit Q *As of Date Project Status Only Active Award Status Only	
*Run By	Refresh Grid	

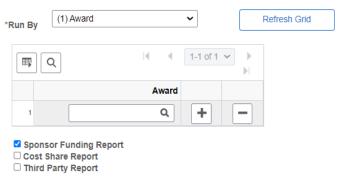
^{*} FYI - If project department is chosen with Cost Share or Third Party reports, please keep in mind that all expenditures may not return if an award has multiple departments providing cost sharing.

^{**} 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)



- * 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.

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



- * 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.

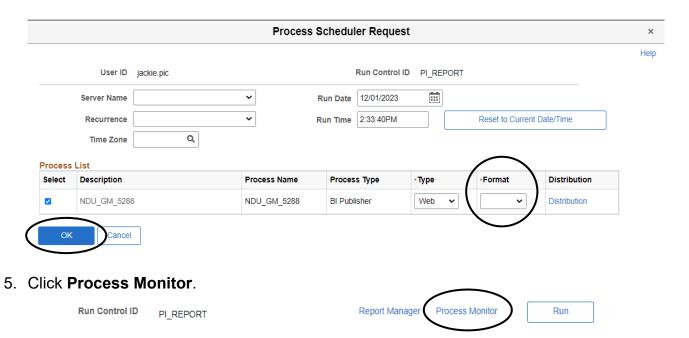
2. Click Save.



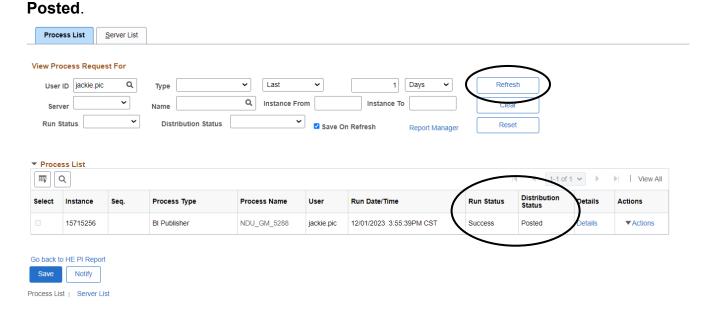
3. Click Run.

Run Control ID PI_REPORT Report Manager Process Monitor Run

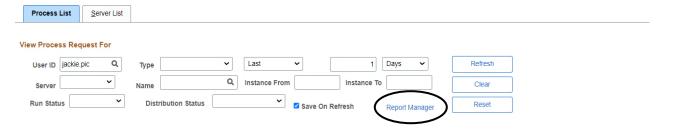
4. Select PDF or XLS Format in Process Scheduler Request and click OK.



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



7. Click Report Manager.



8. Click the hyperlink of the desired report.

