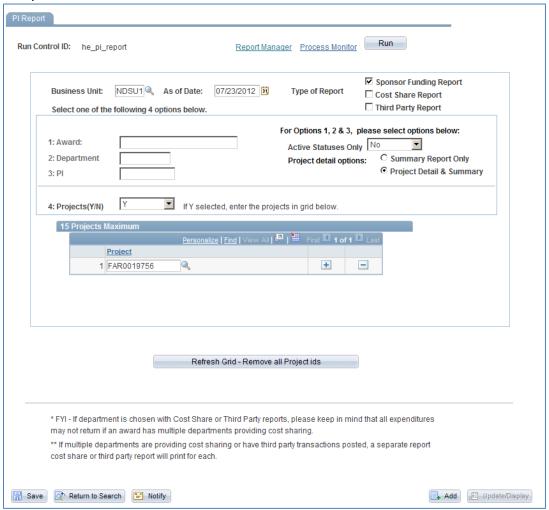# HE PI Reports

A HE PI Report will summarize the budget, current expenditures, encumbrances and cumulative expenditures for a project and/or an award. A PI Report can be run by project, award, department or Principal Investigator (PI).

HE PI Report for a Project

1. Grants – Interactive Reports – HE PI Report
    a. First time
        i. Click Add a New Value
        ii. Enter a run control (ex. he_pi_report) – an underscore can be used to make a space but do not use spaces or other special characters
        iii. Click Add
    b. All other times
        i. Search for Run Control – select
2. Setup run control as follows

3. Business Unit: NDSU1
4. As of Date: Current Date of End of month – this will determine which expenses are reported in the current month column
5. Type of Report: Sponsor Funding Report
6. Projects (Y/N): Y (this will run the PI report for just the project(s) selected)
7. Project Detail Options: Project Detail and Summary
8. Click "Refresh Grid – Remove all Project id's button – this will clear the project so you can enter your desired projects (up to 15)
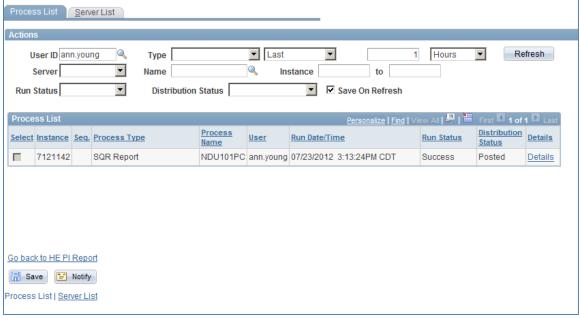
9. Enter Project Number(s)
10. Click Run

Process Scheduler Request

User ID: ann.young   Run Control ID: he_pi_report

Server Name: [▼]   Run Date: 07/23/2012 📅
Recurrence: [▼]   Run Time: 3:13:24PM   [Reset to Current Date/Time]
Time Zone: [🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	PI Report	NDU101PC	SQR Report	[Web ▼]	[PDF ▼]	Distribution

[OK] [Cancel]

11. Click OK

PI Report

Run Control ID: he_pi_report   Report Manager   Process Monitor   [Run]

Process Instance:7121142

☑ Sponsor Funding Report

12. Click Process Monitor

Process List | Server List

Actions

User ID [ann.young 🔍]   Type [▼] [Last ▼]   [1] [Hours ▼] [Refresh]
Server [▼]   Name [🔍]   Instance [   ] to [   ]
Run Status [▼]   Distribution Status [▼] ☑ Save On Refresh

Process List   Personalize | Find | View All | 🔲 | 📊 First ◄ 1 of 1 ► Last

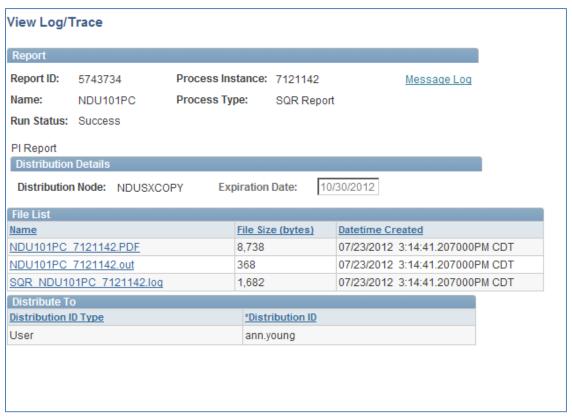| Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	7121142		SQR Report	NDU101PC	ann.young	07/23/2012 3:13:24PM CDT	Success	Posted	Details

Go back to HE PI Report

💾 Save   📧 Notify

Process List | Server List

13. Click Refresh – (until Run Status is "Success" and Distribution Status is "Posted"
14. Click Details hyperlink

Process Detail

Process

Instance 7121142
Name NDU101PC
Run Status Success

Type SQR Report
Description PI Report
Distribution Status Posted

Run

Run Control ID he_pi_report
Location Server
Server PSNT
Recurrence

Update Process

○ Hold Request
○ Queue Request
○ Cancel Request
○ Delete Request
○ Restart Request

Date/Time

Request Created On 07/23/2012 3:14:12PM CDT
Run Anytime After 07/23/2012 3:13:24PM CDT
Began Process At 07/23/2012 3:14:25PM CDT
Ended Process At 07/23/2012 3:14:41PM CDT

Actions

Parameters   Transfer
Message Log
Batch Timings
View Log/Trace

15. Click View Log/Trace

View Log/Trace

Report

Report ID: 5743734
Name: NDU101PC
Run Status: Success

Process Instance: 7121142
Process Type: SQR Report

Message Log

PI Report

Distribution Details

Distribution Node: NDUSXCOPY   Expiration Date: 10/30/2012

File List

Name	File Size (bytes)	Datetime Created
NDU101PC_7121142.PDF	8,738	07/23/2012 3:14:41.207000PM CDT
NDU101PC_7121142.out	368	07/23/2012 3:14:41.207000PM CDT
SQR_NDU101PC_7121142.log	1,682	07/23/2012 3:14:41.207000PM CDT

Distribute To

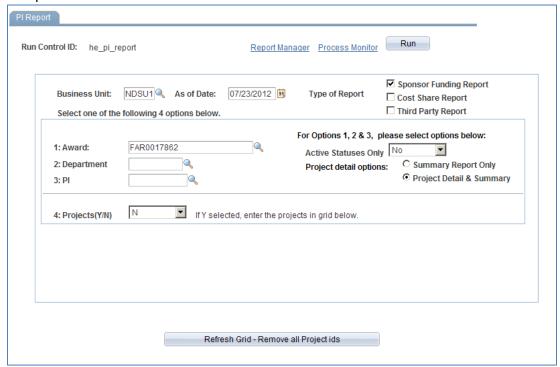| Distribution ID Type	*Distribution ID
User	ann.young

16. Click file that ends in ".pdf"
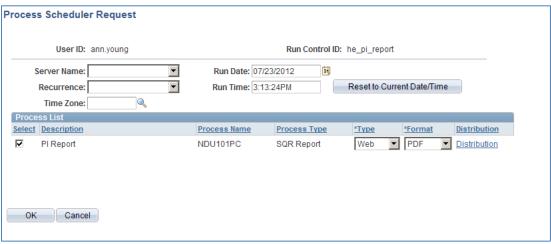17. Review your PI Report

HE PI Report for an Award and all related projects

1. Grants – Interactive Reports – HE PI Report
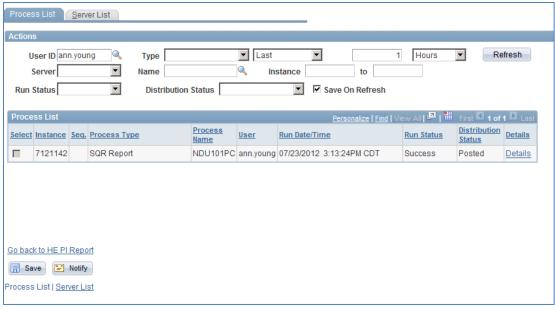   a. Search for Run Control – select

2. Setup run control as follows

3. Business Unit: NDSU1
4. As of Date: Current Date of End of month – this will determine which expenses are reported in the current month column
5. Type of Report: Sponsor Funding Report
6. Award: Enter award Number
7. Projects (Y/N): N
8. Project Detail Options: Project Detail and Summary
9. Click Run

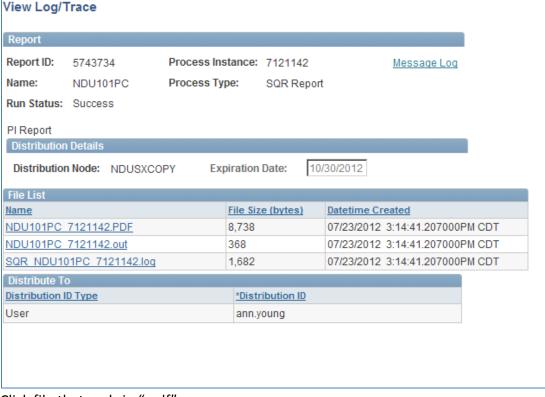10. Click OK

11. Click Process Monitor

Process List | Server List

Actions

User ID ann.young   Type [____] [Last ▼]   [1] [Hours ▼]   [Refresh]
Server [____ ▼]   Name [____ 🔍]   Instance [____] to [____]
Run Status [____ ▼]   Distribution Status [____ ▼]   ☑ Save On Refresh

Process List   Personalize | Find | View All | 🔲 | ⊞   First ◄ 1 of 1 ► Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	7121142		SQR Report	NDU101PC	ann.young	07/23/2012 3:13:24PM CDT	Success	Posted	Details

Go back to HE PI Report

[💾 Save] [✉ Notify]

Process List | Server List

12. Click Refresh – (until Run Status is "Success" and Distribution Status is "Posted"
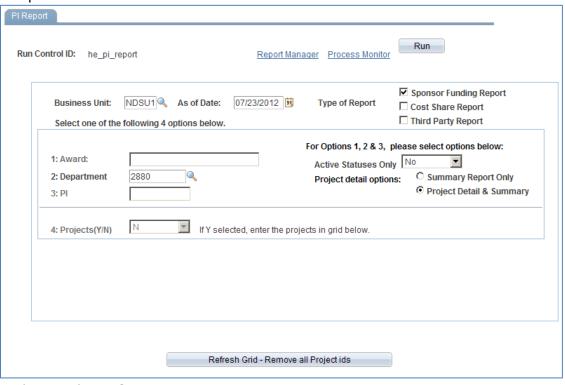13. Click Details hyperlink

Process Detail

Process

Instance 7121142   Type SQR Report
Name NDU101PC   Description PI Report
Run Status Success   Distribution Status Posted

Run   **Update Process**

Run Control ID he_pi_report   ○ Hold Request
Location Server   ○ Queue Request
Server PSNT   ○ Cancel Request
Recurrence   ○ Delete Request
    ○ Restart Request

Date/Time   **Actions**

Request Created On 07/23/2012 3:14:12PM CDT   Parameters   Transfer
Run Anytime After 07/23/2012 3:13:24PM CDT   Message Log
Began Process At 07/23/2012 3:14:25PM CDT   Batch Timings
Ended Process At 07/23/2012 3:14:41PM CDT   View Log/Trace

14. Click View Log/Trace

View Log/Trace

Report

Report ID:	5743734	Process Instance: 7121142	Message Log
Name:	NDU101PC	Process Type: SQR Report	
Run Status:	Success		

PI Report

Distribution Details

Distribution Node: NDUSXCOPY   Expiration Date: 10/30/2012

File List

Name	File Size (bytes)	Datetime Created
NDU101PC_7121142.PDF	8,738	07/23/2012 3:14:41.207000PM CDT
NDU101PC_7121142.out	368	07/23/2012 3:14:41.207000PM CDT
SQR_NDU101PC_7121142.log	1,682	07/23/2012 3:14:41.207000PM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	ann.young

15. Click file that ends in ".pdf"
16. Review your PI Reports – you will get an individual report for each project and a final summary report that summarizes the entire award.

HE PI Report for all Awards within a department
can only be ran after 5:00 pm**

1. Grants – Interactive Reports – HE PI Report
   a. Search for Run Control – select
2. Setup run control as follows

PI Report

Run Control ID:	he_pi_report	Report Manager Process Monitor Run

Business Unit: NDSU1   As of Date: 07/23/2012   Type of Report
☑ Sponsor Funding Report
☐ Cost Share Report
☐ Third Party Report

Select one of the following 4 options below.

For Options 1, 2 & 3, please select options below:

1: Award: _____
2: Department 2880
3: PI _____

Active Statuses Only No
Project detail options: ○ Summary Report Only
                          ● Project Detail & Summary

4: Projects(Y/N) N   If Y selected, enter the projects in grid below.
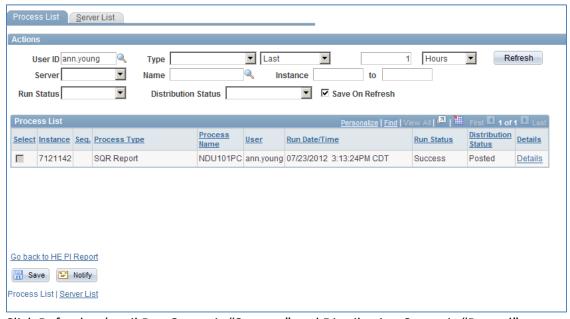
Refresh Grid - Remove all Project ids

3. Business Unit: NDSU1

4. As of Date: Current Date of End of month – this will determine which expenses are reported in the current month column
5. Type of Report: Sponsor Funding Report
6. Department: Enter department number
7. Projects (Y/N): N
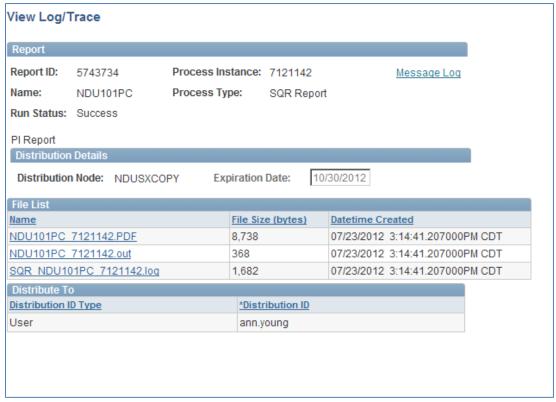8. Project Detail Options: Project Detail and Summary
9. Click Run

10. Click OK

11. Click Process Monitor

12. Click Refresh – (until Run Status is "Success" and Distribution Status is "Posted"
13. Click Details hyperlink

Process Detail

Process

Instance 7121142   Type SQR Report
Name NDU101PC   Description PI Report
Run Status Success   Distribution Status Posted

Run   **Update Process**

Run Control ID he_pi_report
Location Server
Server PSNT
Recurrence

○ Hold Request
○ Queue Request
○ Cancel Request
○ Delete Request
○ Restart Request

Date/Time   **Actions**

Request Created On 07/23/2012 3:14:12PM CDT   Parameters   Transfer
Run Anytime After 07/23/2012 3:13:24PM CDT   Message Log
Began Process At 07/23/2012 3:14:25PM CDT   Batch Timings
Ended Process At 07/23/2012 3:14:41PM CDT   View Log/Trace

14. Click View Log/Trace

View Log/Trace

Report

Report ID: 5743734   Process Instance: 7121142   Message Log
Name: NDU101PC   Process Type: SQR Report
Run Status: Success

PI Report

Distribution Details

Distribution Node: NDUSXCOPY   Expiration Date: 10/30/2012

File List

Name	File Size (bytes)	Datetime Created
NDU101PC_7121142.PDF	8,738	07/23/2012 3:14:41.207000PM CDT
NDU101PC_7121142.out	368	07/23/2012 3:14:41.207000PM CDT
SQR_NDU101PC_7121142.log	1,682	07/23/2012 3:14:41.207000PM CDT

Distribute To

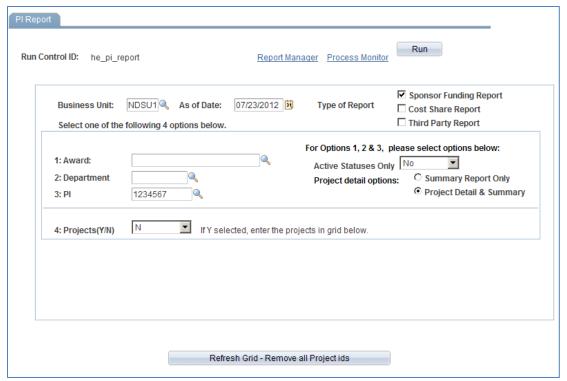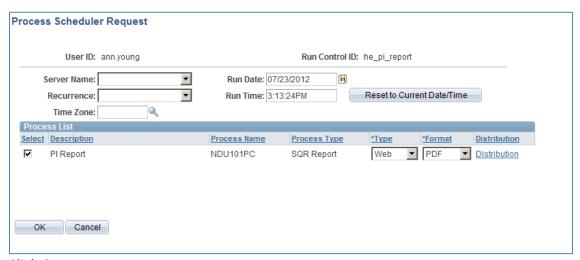| Distribution ID Type	*Distribution ID
User	ann.young

15. Click file that ends in ".pdf"
16. Review your PI Reports

HE PI Report for all Awards for a Principal Investigator (PI)

1. Grants – Interactive Reports – HE PI Report
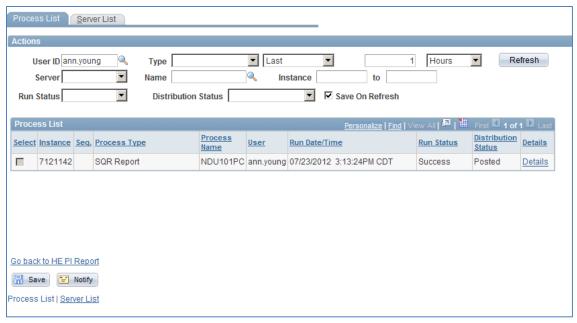   a. Search for Run Control – select
2. Setup run control as follows

3. Business Unit: NDSU1
4. As of Date: Current Date of End of month – this will determine which expenses are reported in the current month column
5. Type of Report: Sponsor Funding Report
6. PI: Enter PI PeopleSoft ID
7. Projects (Y/N): N
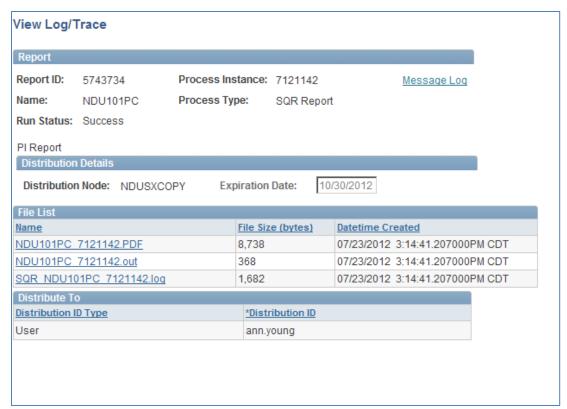8. Project Detail Options: Project Detail and Summary
9. Click Run

10. Click OK

11. Click Process Monitor

12. Click Refresh – (until Run Status is "Success" and Distribution Status is "Posted"
13. Click Details hyperlink

14. Click View Log/Trace

View Log/Trace

Report

Report ID:	5743734	**Process Instance:** 7121142	Message Log
Name:	NDU101PC	**Process Type:** SQR Report	
Run Status:	Success		

PI Report

Distribution Details

Distribution Node: NDUSXCOPY   **Expiration Date:** 10/30/2012

File List

Name	File Size (bytes)	Datetime Created
NDU101PC_7121142.PDF	8,738	07/23/2012 3:14:41.207000PM CDT
NDU101PC_7121142.out	368	07/23/2012 3:14:41.207000PM CDT
SQR_NDU101PC_7121142.log	1,682	07/23/2012 3:14:41.207000PM CDT

Distribute To

Distribution ID Type	*Distribution ID
User	ann.young

15. Click file that ends in ".pdf"
16. Review your PI Reports