PI Reports by Month Range Manual
Office of Sponsored Programs Training
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Access PI Report by Month Range

*Windows Users: If this is your first time accessing the PI Report, go to PI Report Initial Set-up Instructions at: http://discoverer.gmu.edu/access.php

Instructions:
1. To accessing the PI Report by Month Range, enter the following URL: http://discoverer.gmu.edu/pireports/
2. Select PI Reports by Month Range
3. Type in your user name, e.g. psperry
4. Enter your password. * See initial Set-up directions
5. Other fields will default to appropriate values
6. Select Go
1. The initial report view displays the awards for which you have access. **(Data refreshed daily at noon)**
2. Dropdown Status menu “Active” is the default. At Risk, Closed, Inactive and Void grants can be selected.
3. To drill to selected award, select the arrow to the left of the fund number
4. Click on the **Summary by Fund** link
5. Fund and PI information will automatically populate.
6. Select the parameters by typing:
   A. Begin Month **Jan-2013** will include first day of month.
   B. End Month **Mar-2013** will include last day of month.
7. Click **OK**
Summary by Fund Report

Note: New funding, expenses, and commitments posted as of April 1, 2013 will not be included on this sample report. (End date selected was Mar. 31, 2013)

1. Funded amount (1st day of award through Mar. 31, 2013)
2. Expenses (Jan. 1, 2013 through Mar. 31, 2013 ONLY)
3. Expenses (1st day of award through Mar. 31, 2013)
4. Commitments (1st day of award through Mar. 31, 2013)
5. Balance (1st day of award through Mar. 31, 2013)
**Labor Reports**

**Labor & Fringe accounts codes begin with “6”**

**Drop Down Menu:**
- **Labor by Category:** Detail of selected Labor Pooled budget (e.g., Graduate Assistants)
- **Labor (ALL):** Detail of All Labor (all accounts that begin with “6”)
- **Labor Commitments:** Detail of all labor commitments

**Instructions:**
1. Select the **arrow** to the left of account code (e.g., Graduate Assistants)
2. Select **Labor by Category** to see only Graduate Assistants expenses
3. Select **Labor (ALL)** to see all labor and fringe detail (e.g., Faculty Salaries, Grad Assistants, Wages, & Fringe)
4. Select **Labor Commitments** to see all labor commitments
Labor by Category

Drill from account codes that start with “6” to view a detail expenses report of the selected Labor Pooled budget only.

Instructions:
1. Follow steps 1 & 2 in page No. 5
2. The Check Date is sorted in a reverse chronological order
3. To go back to Initial View, click on Initial View tab
4. To go back to Summary by Fund, click on Summary by Fund tab
Labor Account Detail by Employee Report

To view Account Detail by Employee from Labor by Category report:

1. Select the arrow next to the G number of the grad assistant
2. Click on Account Detail by Employee link
3. Data will only include charges to selected months from Jan, 2013 to Mar, 2013
Drill from any account codes that start with “6” to view a detail expenses report of all labor.

Instructions:
1. Follow steps 1 & 3 in page No. 5
2. PI Reports by Month Range – Labor (All) will include all labor expenditures
3. To go back to Initial View, click on Initial View tab
4. To go back to Summary by Fund, click on Summary by Fund tab
Labor Commitment

Drill from any account codes that start with “6” to view a detail report of all labor commitments.

Instructions:
1. Follow steps 1 & 4 in page No. 5
2. The fund number, PI name and parameters will populate automatically
3. Click OK
4. PI Reports by Month Range – Labor Commitments will include all labor commitments
5. To go back to Initial View, click on Initial View tab
6. To go back to Summary by Fund, click on Summary by Fund tab
Direct Expenses Reports

*Direct Expenses & Indirect accounts begin with “7”*

Drop Down Menu:

- **Direct Expenses by Category** Report: Detail of selected Direct Expense Pooled budget (e.g. Travel)
- **Direct Expenses (ALL)** Report: Detail of All Direct Expenses & Indirect (all accounts that begin with “7”)

Instructions:

1. Select the arrow to the left of account code (e.g., Subcontracts)
2. Select **Direct Expenses by Category** to see detail in selected account only
3. Or select **Direct Expenses (ALL)** to see all direct account detail (e.g., Subcontracts, Travel, Other Direct Expenditures, & Indirect)
Direct Expenses by Category

(e.g., Subcontracts selected – Expenses Jan. 1, 2013 – Mar. 31, 2013)

Direct Expenses All

All Direct Expenses posted between Jan. 1, 2013 through Mar. 31, 2013 by account, sorted in reverse chronological order)
Navigation

Instructions:

1. Move within the report using the tabs at the bottom (best when selecting a tab to the left of open tab)
2. Or select the arrow next to the account codes to drill to Labor and Direct Expenses reports.
   a. To view **Labor Expenses** reports, drill from account codes that begin with 6
   b. To view **Direct Expenses** reports, drill from account codes that begin with 7
Printing PI Report by Month Range

1. Click File
2. Select Print
3. From the Print pop-up window, set your workbook as shown below, click OK
4. From the Page Setup pop-up window, set your workbook as shown below, click OK
Export to Excel

Instructions:
1. Click File
2. Select Export “Export to Excel option is Not recommended”
3. From Export: Select Objects pop-up window, check Current worksheet, and Table
4. From Export: Define File Details pop-up window, use Browse to select a different destination
5. Type a name for the report and click Next “Enter a report name e.g. 222222Mar13”
6. Report parameters can be changed from this window
7. Click Finish