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 [🔍]   *As of Date [📅]

Active 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)

*Run By (1) Award ▾   Refresh Grid

	Award		
1	🔍	+	−

☑ **Sponsor Funding Report**
☐ **Cost Share Report**
☐ **Third Party Report**

* 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

Output Option:
○ Summary Only
◉ Detail & Summary   ☑ Summarize by Award
○ Totals Only

* 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**.

   Save   Return to Search   Notify   Add   Update/Display

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**.

5. Click **Process Monitor**.

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

7. Click **Report Manager**.

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

| | | | 1-1 of 1 ▼ | | | View All |

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	NDU_GM_5288 - PI_REPORT_15715256.pdf	NDU_GM_5288 - PI_REPORT_15715256.PDF	General	12/01/23 3:56PM	11100676	15715256