PI Reports Manual
Office of Sponsored Programs Training

2013
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Accessing PI Reports by Month Range

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

Instructions:
1. To access PI Reports, go to the following URL: http://discoverer.gmu.edu/pireports/
2. Select PI Reports
3. Type in your Mason username, e.g. psperry
4. Enter your password (*See Initial Set-up Instructions)
5. Other fields will default to appropriate values
6. Select Go
Instructions:

1. The initial report view displays the awards for which you have access (Data refreshed daily at noon)
2. The Status field default is “Active” (At Risk, Closed, Inactive and Void grants can also be selected)
3. To drill to selected award, click the triangle to the left of the Fund #
4. Select Summary by Fund from the drop-down list
Labor Reports

Pooled Budget Levels are indicated by account codes to classify expenditures by type. Labor and Fringe account codes begin with “6”.

Instructions:
1. Click the triangle to the left of a Labor account code (e.g. 61120 Faculty Special Payments) to view the drop-down option list:
2. Labor by Category: Detail of selected Labor pooled budget (e.g. Faculty Special Payments)
3. Labor (ALL): Detail of all Labor pooled budget levels (e.g. Faculty Salaries, Graduate Assistants, Wages, and Fringe)
4. Labor Commitments: Detail of all Labor Commitments
Labor by Category

Drill from account codes that start with “6” to view a detailed report of the selected Labor pooled budget level.

Instructions:
1. Follow Steps 1 and 2 on Page 5
2. The Check Date is sorted in a descending 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

Instructions:
1. Click the **triangle** to the left of the employee G#
2. Select **Labor Detail by Employee** from the drop-down list
3. Data will only include charges to selected Fund
4. To go back to Initial View, click on **Initial View** tab
5. To go back to Summary by Fund, click on **Summary by Fund** tab
Drill from any account code that starts with “6” to view a detailed report of all Labor

**Instructions:**
1. Follow steps 1 and 3 on Page 5
2. PI Reports – 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

![PI Reports - Labor (ALL) Table]

<table>
<thead>
<tr>
<th>Account</th>
<th>Account Desc</th>
<th>Siff</th>
<th>First Name</th>
<th>Last Name</th>
<th>Gmu Id</th>
<th>Pay</th>
<th>Position</th>
<th>Check Date</th>
<th>Expenses To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
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<tr>
<td>61913</td>
<td>FICA Tax Wages</td>
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<td></td>
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<tr>
<td>61914</td>
<td>Group Insurance</td>
<td>00</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Click here to retrieve the next 250 rows.
Drill from any account code that starts with “6” to view a detailed report of all labor commitments

**Instructions:**
1. Follow steps 1 and 4 on Page 5
2. The Fund # will populate automatically
3. Type the current fiscal year in the pop-up window
4. Click **OK**
5. Labor Commitments report will include all labor commitments
6. To go back to Initial View, click on **Initial View** tab
7. To go back to Summary by Fund, click on **Summary by Fund** tab
Direct Expense Reports

Direct Expense and Indirect account codes begin with “7”

Instructions:

1. Click the triangle to the left of a Direct Expense account code (e.g. 70000 Other Direct Expenditures) to view the drop-down list:
2. **Direct Expenses by Category**: Detail of selected Direct Expense pooled budget (e.g. Travel)
3. **Direct Expenses (ALL)**: Detail of all Direct Expense pooled budget levels and Indirect (e.g. Travel, Other Direct Expenditures, Indirect)

![Image of a spreadsheet showing PI Reports: Summary by Fund with Direct Expenses by Category selected and dropdown options for Labor by Category, Labor (ALL), Direct Expenses by Category, Direct Expenses (ALL), and Labor Commitments. The screen also highlights the Direct Subtotal row labeled 1,582,783.00 with a dropdown menu opened showing the Direct Expenses by Category option selected. The Grand Total row shows 1,779,893.00.]
**Direct Expenses by Category**

Drill from account codes that start with “7” to view a detailed report of the selected Direct Expense pooled budget level

**Instructions:**
1. Follow steps 1 and 2 on Page 11
2. To go back to Initial View, click on **Initial View** tab
3. To go back to Summary by Fund, click on **Summary by Fund** tab
Direct Expenses (ALL)

Drill from any account code that starts with "7" to view a detailed report of all direct expenses

Instructions:
1. Follow Steps 1 and 3 on Page 11
2. To go back to Initial View, click on Initial View tab
3. To go back to Summary by Fund, click on Summary by Fund tab
**Instructions:**

1. Select the **triangle** to the left of the account codes to drill to Labor and Direct Expense 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”

2. Move between reports using the tabs at the bottom (best when selecting a tab to the left of an open tab)
Printing PI Reports

Instructions:
1. Click File from the menu
2. Select Print from the drop-down list
3. From the Print pop-up window, select the options as shown then click OK
4. From the Page Setup pop-up window, select the options as shown then click OK
Exporting to Excel

Instructions:
1. Click **File** from the menu
2. Select **Export** (Export to Excel option is not recommended)
3. From the Export pop-up window, select the options as shown then click **Next**
4. From the next Export pop-up window, click **Browse** and select a different destination folder
5. Type a name for the report and click **Next** (Enter a report name, e.g., 222222 Mar13)
6. Report parameters can be changed from this next window
7. Click Finish