Table of Contents

Accessing PI Reports by Month Range ................................................................. 3
PI Reports by Month Range Initial View ............................................................. 4
Summary by Fund Report ...................................................................................... 5
Labor Reports ........................................................................................................ 6
  Labor by Category .............................................................................................. 7
    Labor Account Detail by Employee ................................................................. 8
  Labor (ALL) ....................................................................................................... 9
  Labor Commitments ......................................................................................... 10
Direct Expense Reports ....................................................................................... 11
  Direct Expenses by Category ........................................................................... 12
  Direct Expenses (ALL) .................................................................................... 13
Navigation ............................................................................................................ 14
Printing PI Reports by Month Range ................................................................. 15
Exporting to Excel ............................................................................................... 16
Accessing PI Reports by Month Range

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

Instructions:
1. To access PI Reports by Month Range, go to the following URL: [http://discoverer.gmu.edu/pireports/](http://discoverer.gmu.edu/pireports/)
2. Select **PI Reports by Month Range**
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**
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
5. Fund # and PI fields will automatically populate
6. Input the parameters by typing:
   A. Begin Month Jan-2013 will include first day of the month
   B. End Month Mar-2013 will include last day of the 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 between begin month and end month (Jan 1, 2013 through Mar 31, 2013 ONLY)
3. Expenses through end month (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

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. 61190 Graduate Assistants) to view the drop-down option list:
2. Labor by Category: Detail of selected Labor Pooled budget (e.g. Graduate Assistants)
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 6
2. The **Check Date** is sorted in 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

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### PI Reports by Month Range - Labor by Category

**Fund:** Pooled Budget Level: '61190', Begin Month: 'Jan. 2013', End Month: 'Apr. 2013'

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<th>Account</th>
<th>Account Desc</th>
<th>Suff</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</th>
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<td>Andrew</td>
<td>Chay</td>
<td>G0602139</td>
<td>SM</td>
<td>GR3462</td>
<td>29-MAR-2013</td>
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</table>

**Subtotal:** $5,500.00

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[Diagram annotations: 1. Follow Steps 1 and 2 on Page 6, 2. The **Check Date** is sorted in 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

Instructions:
1. Click the **triangle** to the left of the employee G#
2. Select **Account Detail by Employee** from the drop-down list
3. Data will only include charges from selected months Jan 2013 through Mar 2013
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 6
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 Commitments

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 6
2. The Fund # and PI parameters will populate automatically
3. Click OK
4. Labor Commitments report 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 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. 73600 Subcontracts) to view the drop-down option list:
2. Direct Expenses by Category: Detail of selected Direct Expense pooled budget (e.g. Subcontracts)
3. Direct Expenses (ALL): Detail of all Direct Expense pooled budget levels and Indirect (e.g. Travel, Other Direct Expenditures, Indirect)
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. The Transaction Date is sorted in 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
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. PI Reports by Month Range – Direct Expenses (ALL) will include all direct 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

Note: Expenses that are listed from the Begin Month to the End Month. Expenses that fall outside of that time range will not appear on this report.
Navigation

Instructions:
1. Select the **triangle** to the left of the account codes to drill to Labor and Direct Expense reports
   a. To view **Labor Expense** reports, drill from account codes that begin with **“6”**
   b. To view **Direct Expense** 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 by Month Range

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