Principal Investigator (PI) Reports in UM Reports

The PI Report category in UM Reports contains reports that include both sponsored and nonsponsored financials specific to projects and ChartField strings associated to a PI.

1. Navigate to: www.umreports.umn.edu

2. Login with an Internet ID (x.500 username) and password. The UM Reports home page displays. The first time UM Reports is accessed, the University's Appropriate Use Agreement must be read and agreed to, in order to ensure that policies and procedures are adhered to by all employees using UM Reports.

3. Click <Search Reports> in the left navigation menu on the UM Reports home page.

4. Select “Principal Investigator (PI)” as the Filter By category.

Three options are available in this view:

- Sponsored/Non Sponsored Summary - Overall
- Sponsored Project Summary by Budget Period
- Additional reports and drill downs

The additional reports accessed through the bottom link in this view are detail level reports; these are also available through drill down from the summary level reports, Sponsored/Non Sponsored Summary - Overall and Sponsored Project Summary by Budget Period.

Output forms for each report include options for PDF format as well as Excel or CSV format.
Principal Investigator (PI) Reports in UM Reports (cont.)

A summary description of each report appears below along with the prompts requiring completion with appropriate values. Prompts required to run reports are completed by making selections from a drop-down menu of available values. Note that the Internet ID field includes last name, first name, and Internet ID. When drilling down from a summary level report to detail level reports, the same date or budget period applies. Nonsponsored ChartField string data will only be returned for these reports after departments create the link associating ChartField string values to an Internet ID.

Summary Level Reports

<table>
<thead>
<tr>
<th>SPONSORED/ NON-SPONSORED SUMMARY - OVERALL</th>
<th>Provides a list of sponsored projects and nonsponsored ChartField strings associated to an Internet ID (x.500 username). Provides summary data for budget, resources, encumbrances, expenses, and balance remaining.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click &lt;Go to Report&gt;.</td>
<td>2. Complete the drop-down prompts for: Internet ID, Chartstring Map or Project(s), Through Period.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPONSORED PROJECT SUMMARY BY BUDGET PERIOD</th>
<th>Provides summary data for all PI sponsored projects including budget, encumbrances, expense, and balance remaining by budget Period.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click &lt;Go to Report&gt;.</td>
<td>2. Complete drop-down prompts for: Internet ID and Sponsored Project.</td>
</tr>
</tbody>
</table>

Additional Reports: Account Detail Level

The following reports are available through drill down from the two summary level reports listed above as well as through the link <Click here for details on the additional reports and drill downs>.

<table>
<thead>
<tr>
<th>SPONSORED PROJECT ACTIVITY BY BUDGET PERIOD</th>
<th>Summarizes budget period transactions (budget, encumbrance, and expense) through the specified budget period. Includes subtotals for direct and indirect. Data is summarized at the budget account level (e.g., “Travel”).</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click &lt;Go to Report&gt;.</td>
<td>2. Complete drop-down prompts for: Internet ID, Sponsored Project, and Budget Period.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SPONSORED PROJECT ACTIVITY BY PROJECT PERIOD</th>
<th>Summarizes current month and inception-to-date transactions (budget, encumbrance, and expense) through a specified calendar month and year. Includes subtotals for direct and indirect. Data is summarized at the budget account level (e.g., “Travel”).</th>
</tr>
</thead>
</table>
Principal Investigator (PI) Reports in UM Reports (cont.)

**NON-SPONSORED ACTIVITY BY FISCAL YEAR**

Summarizes month and fiscal year-to-date transactions (budget, encumbrance, and expense) through a specified calendar month and year. Includes subtotals for resources and expenses, and subtotals for payroll/fringe and Non-Payroll totals. Data is summarized at the budget account level (e.g., “Travel”).

1. Click <Go to Report>.
2. Complete drop-down prompts for: Internet ID, Non Sponsored Chartstring, Through Period.

**Additional Reports: ChartField String Detail Level**

The following reports are available through drill down from the two summary and three account detail level reports listed above as well as through the link <Click here for details on the additional reports and drill downs>.

**PAYROLL DETAIL**

Provides salary, fringe expense, and encumbrance detail by employee for a selected ChartField string or by sponsored project and time period.

1. Click <Go to Report>.
2. Complete prompts for: Internet ID
   * Sponsored prompts: Project Period/Budget Period/Calendar Month, Sponsored Project, and time period.
   * Non-sponsored prompts: Fiscal Year/Calendar Year and Non-Sponsored Chartstring.

**TRANSACTION DETAIL**

Provides expense and encumbrance detail including the description for a selected ChartField string or sponsored project and time period.

1. Click <Go to Report>.
2. Complete prompts for: Internet ID
   * Sponsored prompts: Project Period/Budget Period/Calendar Month, Sponsored Project, and time period.
   * Non-sponsored prompts: Fiscal Year/Calendar Year and Non-Sponsored Chartstring.