



Quick Reference for PI Reports

9/24/2009

General Information

What are PI Reports?

PI Reports are a collection of reports designed to assist Principle Investigators and Grant Administrators in monitoring a project budget. The reports include a summarized snapshot of the financial position for each sponsored project, with drill-down capability to detailed financial information including personnel details. The reports use Discoverer and replace Self Service and e~print.

What is Discoverer?

Discoverer is a web-based reporting tool that allows drilling and pulls information from the Banner Data Marts. The reports are refreshed once per day at noon. The data in the report will be current as of the most recent refresh.

Initial Software Installation

The first time the reports are accessed, the following steps are necessary (not applicable for Mac users).

1. Open Internet Explorer or Mozilla Firefox to download software.
2. Enter the following url:
<https://thetis.gmu.edu:8250/jpi/j2re.exe> to install Java (1.4.2_06)
3. Select run twice for Explorer; select save, OK for Firefox
4. Select "I accept the terms in the license agreement" then next twice
5. Press finish

Accessing the Report

1. Enter the following url:
<http://discoverer.gmu.edu/pireports/>
2. Bookmark this url for future use
3. Disable any pop-up blocker features in your browser or toolbars
4. Under the appropriate operating system, select PI Reports
5. Enter user name = e-print user ID (e.g., mstrauch)
6. Enter Password = 6 digit e-print pin (all other fields will default to appropriate values)
7. Select Go
8. Select Yes when asked to run the query in "Initial View"*

*users may choose to avoid this prompt by selecting Tools, Options, General, and check the box for "Run Query Automatically"

Reviewing the Report

All projects for which you have access will be sorted by end date and listed with the following columns:

PI
Sponsor
Fund title
Grant number
Fund number
Org Description
Start Date
End Date (reflects any extensions)
Funded Amount (budget)
Expenses to Date
Commitments (requisitions and P.O.s entered in Banner, plus labor expected through June 30)
Available Amount

Detailed information available for items listed in blue

1. Select the arrow to the left of the blue fund #
2. Select Pooled Budget Summary
3. Select the arrow to the left of account code (e.g., 73800 Travel)
4. Select from: Direct Expenses by Pooled Budget, Direct Expenses (ALL) or Labor Summary (Direct Expense accounts begin with 7; Labor accounts begin with 6)
5. Data is sorted in reverse chronological order
6. Category subtotal presented on yellow line
7. When viewing Labor Summary, select the arrow to the left of the G# for labor detail. Data reflects charges to the selected fund only.

Navigation and Options

1. Move within the report using the tabs at the bottom
2. Use the arrows at bottom right to return to previously viewed screens
3. Add notes by double clicking edit text area; save report to desktop if notes added
4. Export to Excel by clicking File, Export, then follow screen prompts
5. Status may be changed from Active by selecting the drop down menu located in the upper left of the screen

Whom to Call for Help

ITU Support Center	703-993-8870
Accounts Payable/Purchasing	703-993-2580
Travel Office	703-993 2623
Fiscal Services	
Michael Wharton	703-993-2089
Maureen Strauch	703-993-2620
Sponsored Programs	
Pat Sperry	703-993-8929