Quick Reference for PI Reports by Month Range

11/2/2012

General Information

What are PI Reports by Month Range?
PI Reports are a collection of reports designed to assist Principal Investigators and Grant Administrators in monitoring a project budget. The reports include a summarized snapshot of the financial position for each sponsored project for a specified time period 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 (optimal browser for viewing the report)
2. Enter the following url to install Java
https://gomeisa.gmu.edu:8250/jpi/jre-6u31.exe
3. Select run twice in the pop-up windows
4. Select install
5. Press close
6. Open the Start Menu
7. Select Settings
8. Select Control Panel
9. Double click on the Java Plug-in icon
10. Select Update tab
11. Uncheck box next to “check for Updates Automatically”
12. Select never check
13. Click Apply

Accessing the Report

1. Disable any pop-up blocker features in your browser or toolbars. To disable pop-up blocker in Explorer, go to Tools, select Pop-Up Blocker, uncheck box next to “Pop-Up Blocker” and press save.
2. Enter the following url:
http://discoverer.gmu.edu/pireports/
3. Bookmark this url for future use
4. Under the appropriate operating system, select PI Reports by Month Range
5. Enter User Name = Mason Username (aka NetID)
6. Enter Password = Oracle Password (please call ITU Support Center 3-8870 for assistance) (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 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
   - Fund number
   - Grant 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

Detail information available for items in blue
1. Select the arrow to the left of the blue fund #
2. Select Pooled Budget Summary
3. Enter report beginning month and year (Jan-2006) in Select Begin Month
4. Enter report ending month and year (Mar-2006) in Select End Month, select OK
5. Select the arrow to the left of account code (e.g., 73800 Travel)
6. Select from: Labor by Pooled Budget, Labor Summary (ALL), Direct Expenses by Pooled Budget, Direct Expenses (ALL) (Labor accounts begin with 6; Direct expense accounts begin with 7)
7. Data is sorted in reverse chronological order
8. 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 report using the tabs at the bottom
2. Export to Excel by clicking File, Export, then follow screen prompts
3. Status may be changed from Active by selecting the drop down menu located in the upper left of the screen
4. Select Exit to end session

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