

## Report Prompt Instructions

*Below are the prompt instructions for each of the auxiliary reports for department use, to help with the monthly PI Compliance Report PIs Receive. Click the report title below to navigate to the instructions for that report.*

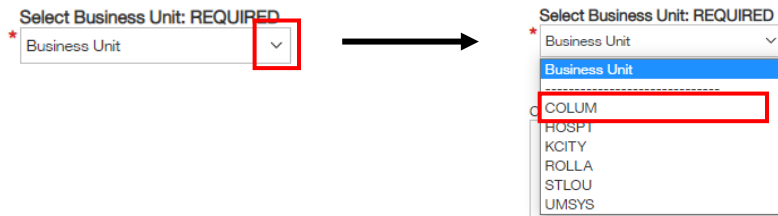
- [PI Compliance Report - Prior Month](#)
- [PI Compliance Report - Pick Dates](#)
- [PI Log Report – Dept Non-Reviewed](#)
- [PI Distribution Report for Depts – with Link](#)

# Report Prompt Instructions

## PI Compliance Report - Prior Month

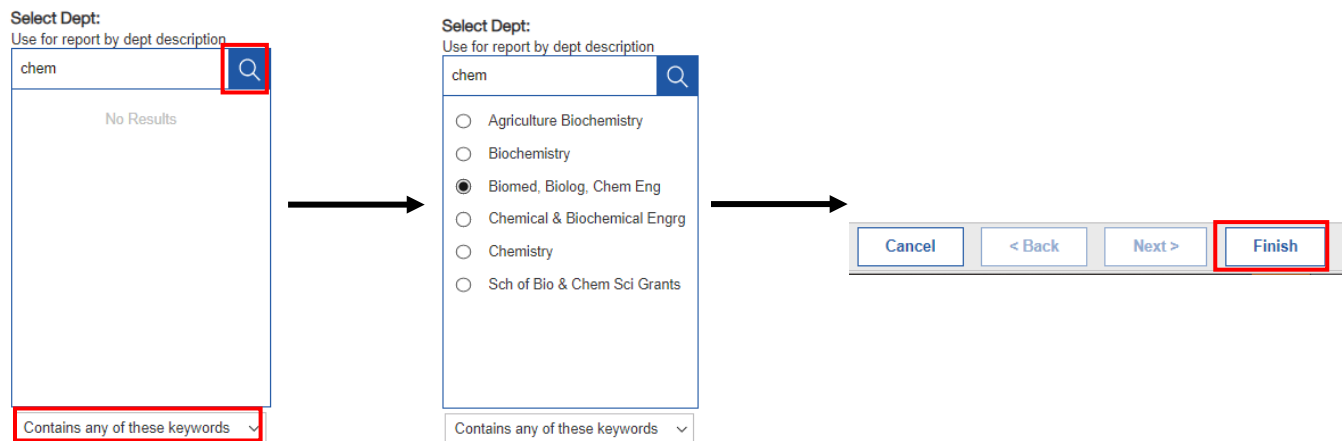
First, Select the Business Unit you are running the report for.

- **NOTE: You must select the Business Unit before any other filter**



There are 4 options for you to run/filter your report.

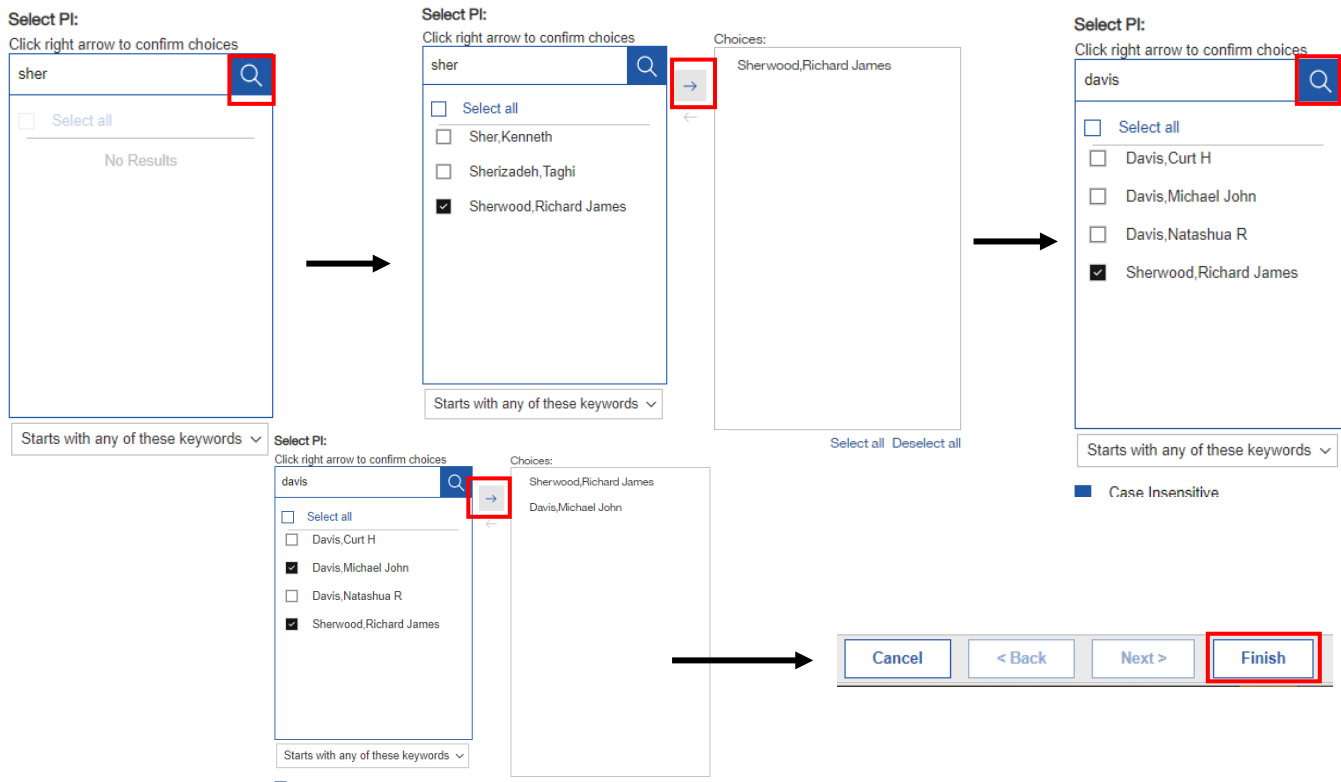
1. You can filter by department to run a single report that contains all PIs in that department and their projects.
  - a. Type department name and click the magnifying glass.
  - b. Select department you need and click the right arrow to move selection to Choices.
  - c. Then click Finish
  - d. TIP: Use the dropdown box at the bottom of each prompt to change search terms from 'Start with' to 'Contains'. This will allow you to expand your search beyond the exact names.
  - e. Note: If a PI has a project in a different department that project will not appear in the report



2. You can filter by a single or multiple PIs
  - a. If you want all the projects for each PI, enter their last name. Search using the magnifying glass.
  - b. Select the PI you need. Click the right arrow to move to choices
  - c. Click Finish at the bottom

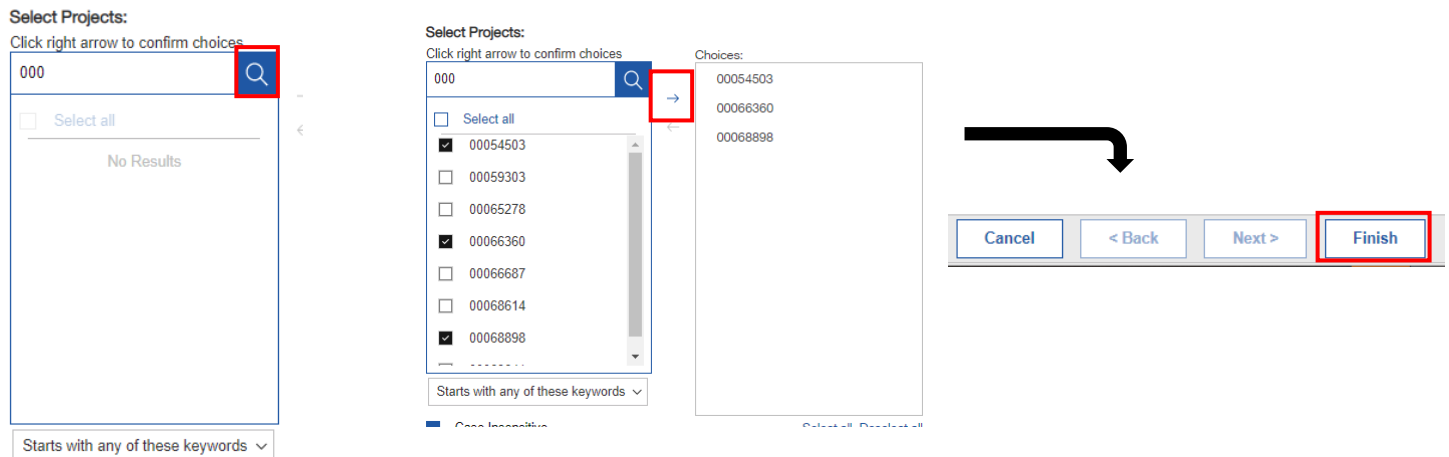
# Report Prompt Instructions

- d. Note: You will need to search for, select, and move each PI individually to Choices before searching for a new PI



### 3. If you want to run a report for specific projects for selected PIs

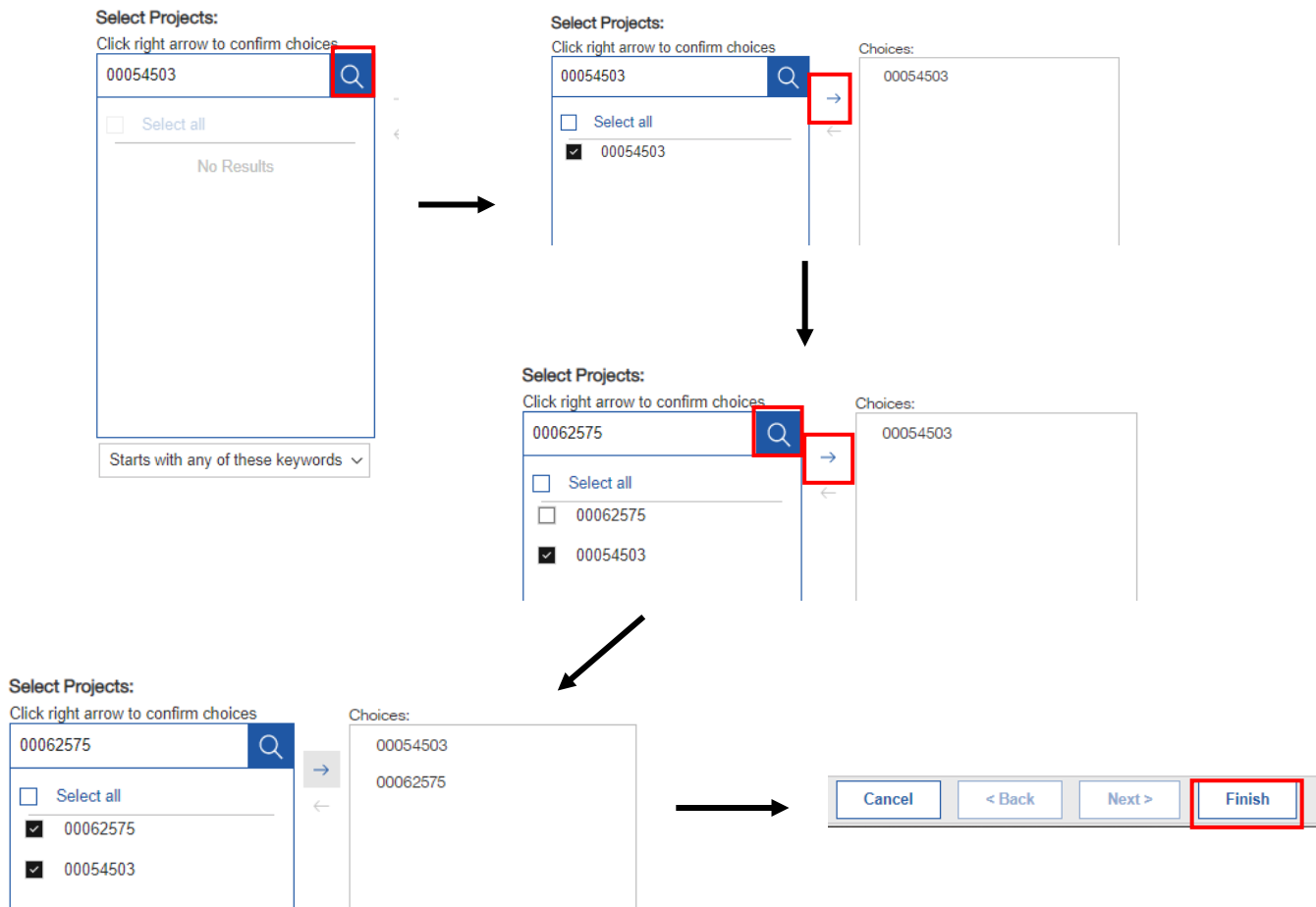
- First, complete the PI selection process described above for the PIs of the projects you need
- Before Clicking Finish, move to Select Projects box, Type '000', and click the magnifying glass
- All open projects for selected PIs will appear. Select needed projects and click right arrow to move to Choices
- Click Finish



4. If you only want to see output for a specific project numbers, you can type in the project number in the Select Project box. Search by clicking the magnifying glass, select, and move to Choices

# Report Prompt Instructions

- a. Note: You will need to search for, select, and move each project individually to Choices before searching for a new project
- b. Then click Finish



## PI Compliance Report - Pick Dates

1. Filter report using one of the options described above.
2. Click on the 'FROM:' Date Text Box and Enter start date for transactions in MM/DD/YYYY format
3. Click on the 'TO:' Date Text Box and Enter final date for transactions in MM/DD/YYYY format
4. Click Finish at the bottom

The image shows a two-step process for entering transaction dates. The first step shows the 'From:' field with '1/1/2021' and the 'To:' field with 'Mar 12, 2021'. The second step shows the 'From:' field with 'Jan 1, 2021' and the 'To:' field with '2/28/2021'. Below the date fields is a navigation bar with four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. The 'Finish' button is highlighted with a red border.

Enter Transaction Dates: REQUIRED

From: \* 1/1/2021

To: \* Mar 12, 2021

Enter Transaction Dates: REQUIRED

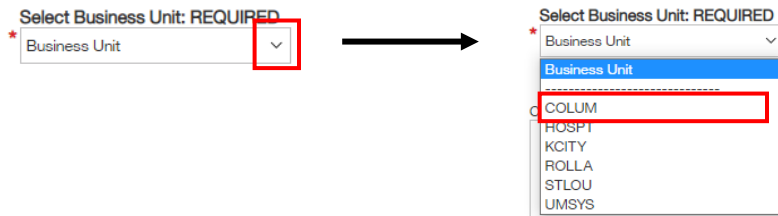
From: \* Jan 1, 2021

To: \* 2/28/2021

Cancel < Back Next > Finish

## PI Log Report – Dept Non-Reviewed

1. First, Select the Business Unit you are running the report for.
  - **NOTE: You must select the Business Unit before any other filter**



2. Next, either type in the Dept Node in the Select Department Search field, or start typing the department name in the Select Department Description field.
  - a. Click the magnifying glass to search
  - b. Select the department you want
  - c. Click the Right Arrow to move to choices
  - d. You do have the ability to select multiple departments

### Dept Node

#### Select Department

- Before Clicking Finish at the bottom, click the Right Arrow to move Selections to Choices

Selections:

Input keywords here

Select all

No Results

Starts with any of these keywords ▾

Case Insensitive

### Dept Name

#### Select Department Description

- Before Clicking Finish at the bottom, click the Right Arrow to move Selections to Choices

Selections:

Input keywords here

Select all

No Results

Starts with any of these keywords ▾

Select all Deselect all  Case Insensitive

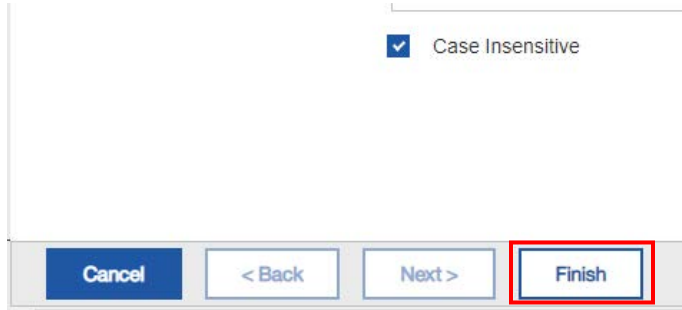
Choices:

Select all Deselect all

- **Tip: Update the search terms in the drop down before the search box, to search by 'Contains' rather than 'Starts with'**

# Report Prompt Instructions

3. Click Finish at the bottom to run the report



A screenshot of a software dialog box. At the top, there is a horizontal line. Below it, on the right side, is a checked checkbox labeled "Case Insensitive". At the bottom of the dialog, there is a row of four buttons: "Cancel" (dark blue), "< Back" (light blue), "Next >" (light blue), and "Finish" (light blue). The "Finish" button is highlighted with a red rectangular border.

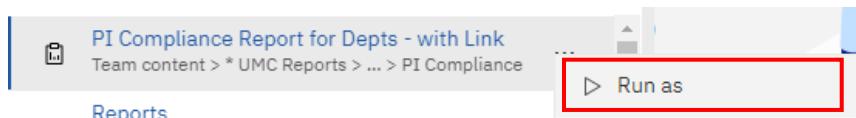
## PI Distribution Report for Depts – with Link

- We recommend running this report to email, so the report can be easily sent directly to the PI, or to you and forwarded to the PI with additional information as need. Find the report to run as normal then:

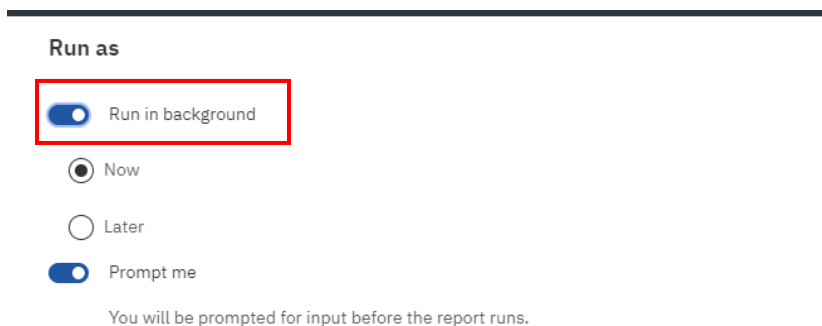
1. Click the Ellipsis on the far right



2. Click Run As:



3. Click Run in background



4. Choose HTML - The report MUST be in HTML for the Confirmation Link to work



5. Choose send report by email and click edit details



# Report Prompt Instructions

**Delivery**

Save

Save report

Save as a report view

Save report as an external file

Send report by email

[Edit details](#)

No recipients

6. Enter the email addresses the report link needs to be sent in the 'To' field, Update the Subject Line if necessary, and add whatever you would like the email to say in the Message field

← Send report by email

To

lockhartc@umsystem.edu

Cc | Bcc [Directory](#)

Subject

A new version of PI Compliance Report for Depts - with Link is available

Message

Dr.

Below is a link to your outstanding PI Compliance Report for March 2021 Expenses

body p

7. Click RUN at the very bottom

Cancel Run

# Report Prompt Instructions

8. First, Enter the PI's Last Name, in the Select PI field. Click the magnifying glass

Select PI:

Click magnifying glass to search

Enter PI Last Name

No Results

Starts with any of these keywords

Case Insensitive

9. Select the PI Name for which you need the report
10. Click the Month of Expenses the PI needs to Review
  - a. You can only run 1 month at a time

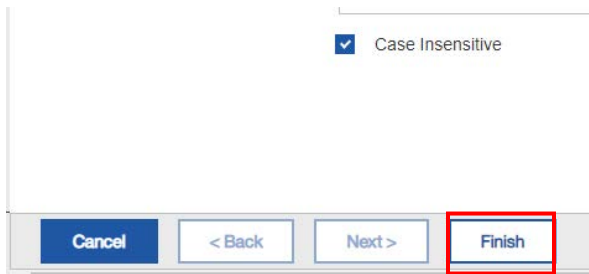
Select Month of Expenses:

January 2021

February 2021

# Report Prompt Instructions

11. Click Finish at the bottom to run the report



A screenshot of a software dialog box. At the top, there is a checked checkbox labeled "Case Insensitive". Below this, there is a horizontal bar containing four buttons: "Cancel" (dark blue), "< Back" (light blue), "Next >" (light blue), and "Finish" (light blue). The "Finish" button is highlighted with a red rectangular border.

12. The report will appear in the receivers' inbox in a couple of minutes, generally takes 5 but could take up to 15