

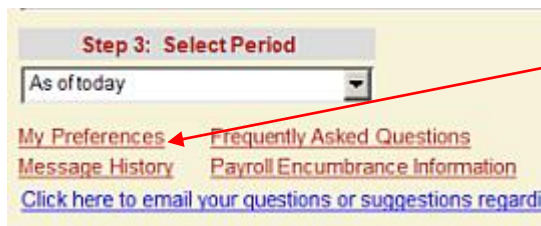
Quick Reference for WRS Report 18

For Administrative Users

General Notes:

- Report 18 was developed based on feedback from Principal Investigators. This report will display all projects where the Principal Investigator is listed as either a Lead or Co-PI.
 - If the User is also a Department Head and has requested access to projects within their respective departments, the list will include all projects where they are a Lead or CO-PI or Department Head.
- Report 18 will provide summary information about **Ledger 5 projects ONLY**.
- This report provides Post Award Financial Information only.
- Administrative Users will have the ability to select the Principal Investigator's name from a dropdown list or enter their Employee Id to locate the desired report.
 - The dropdown list has a "type ahead / quick type" function to allow the user to quickly locate the desired Principal Investigator's name.
- The Administrative User will have the ability to designate which projects to include in the search, based on the project status.
 - The **options** available are projects with a **Project Status** of **Active & Pending** (i.e., Frozen), **Inactive** only, or **All** projects regardless of the project status.
 - The project status displayed on the report is representative of the current status in Financials.
- The default sort order of this report is all projects with an Active status first, then Pending, followed by Inactive Projects (if included).
 - The projects are in numerical order within each project status.
- The first time users log into the Wolfpack Reporting System (WRS) after October 3, 2011, they must add Report 18 to their list of reports.

A. Steps to Add Report 18 to your list of reports:

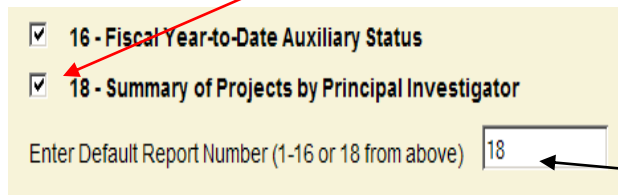
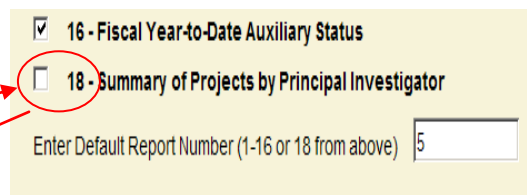


Step 1:

Press the "My Preferences" hyperlink

Step 2:

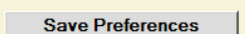
Select **Report 18** to add this report to the report list.



Step 3:

Do you want Report 18 to be your default report? Y or N
If yes, you must enter it here

Step 4:

Press the  button to save your changes.

Step 5:

Press the  button to return to the WRS Main Menu.

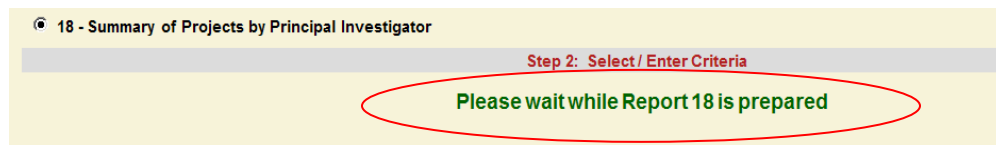
Quick Reference for WRS Report 18

For Administrative Users

Note: Principal Investigators have the ability to have the report automatically run the first time they log into the WolfPack Reporting System (WRS). To set the report to automatically run, the PI must have Report 18 set as their default report. When it is set as a default report and automatically runs, the following message will appear:

FYI

For potential questions from PI's

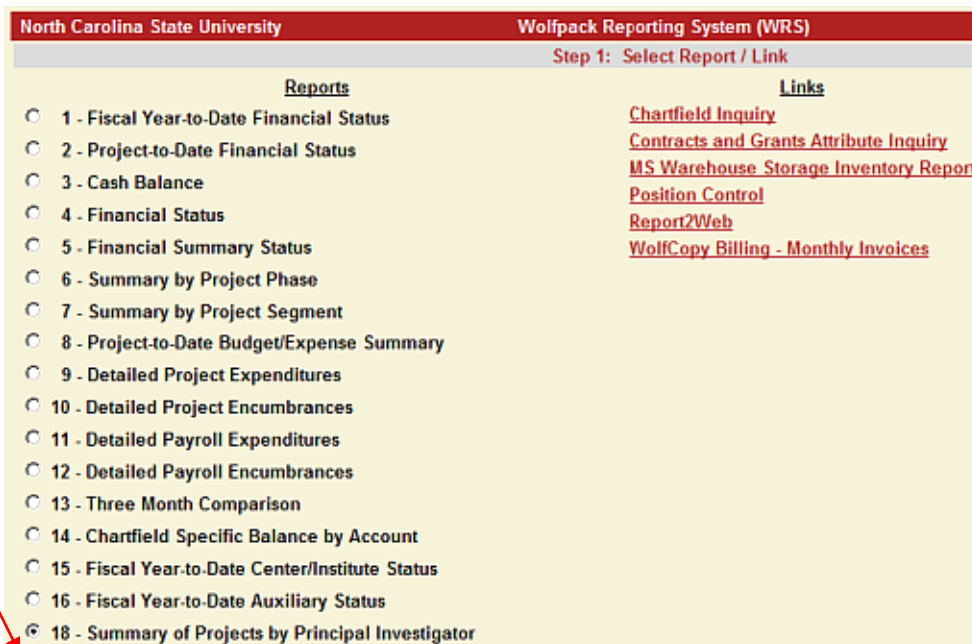


- ❖ Report 18 will **not** automatically run if the following conditions exist:
 - Report 18 is **not** the **default** report.
 - The user is already in WRS and returns to the Main Menu to select Report 18 from the list.

B. Steps to manually run or customize the Report 18 information:

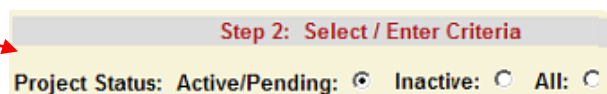
Step 1:

Select Report 18 from the WRS listing



Step 2:

Select the Project Status to include:



- **Note:** As a **default**, the system will retrieve Active/Pending projects only for the selected PI.
- **Active/Pending** = All projects where the project period has not expired, or has not completed the final closeout process.

Note: The final closeout process includes, but is not limited to, awaiting final payment from the agency and/or posting of final charges listed as a reconciling item on the closeout.

- **Inactive** = All projects where the project period has expired, all expenditures related to the technical nature of the project have posted and all sponsor payments received.
- **All** = All projects regardless of the project status.

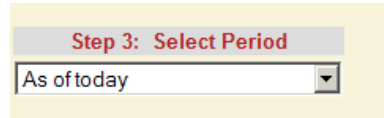
Quick Reference for WRS Report 18

For Administrative Users

Step 3:

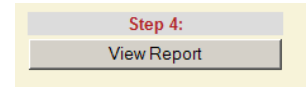
Select the desired month end period.

- The default is **“As of Today.”**
- Press the dropdown to select a prior period.



Step 4:

When the search criterion matches the desired outcome, press the “View Report” button to initiate the search request.



Step 5:

The results screen will display a list of projects

Snapshot of Report 18 results screen.

Report 18 - Summary of Projects by Principal Investigator
As of September 22, 2011
Principal Investigator: Burrell,Thelia Blackmon

Project	Role	Status	Sponsor	Description	Current Budget	Project to Date Expenses	Encumbrances	Budget Balance Available
520919	Co-PI	Active	WACHOVIA TRANSFER	C&G Suspense Account	0.00	0.00	0.00	0.00
538003	Lead PI	Active	U S DEPT OF EDUCAT.	ED Clearing Account	0.00	0.00	0.00	0.00
551551	Co-PI	Active	UNIV OF ARKANSAS	UNIV OF ARKANSAS	94,587.00	25,749.85	70,150.94	(1,313.59)
552654	Co-PI	Active	NC DOT	High Speed Rail	397,018.00	167,953.17	0.00	229,064.83
525033	Co-PI	Pending	N C SEA GRANT PGM	Blue Crab Stock Enhancement	32,448.00	32,448.00	0.00	0.00
Total					\$524,053.00	\$226,150.82	\$70,150.94	\$227,751.24

This should be the PI's name

- The list provides a financial snapshot of the projects.
- The list includes all projects where the Principal Investigator is either the Lead or Co-PI or Dept Head.
- The list provides summary information about the Principal Investigator's role on the project, the current budget, PTD expenditures, encumbrances, and the budget balance available for each project.
- All columns are sortable.

Note:

- To sort by a specific column, press the column heading.
- Columns can be sorted in ascending or descending order.

Step 6:

To view the project details press the **Project ID hyperlink**.

Report 18 - Summary of Projects by Principal Investigator
As of September 22, 2011
Principal Investigator: Burrell,Thelia Blackmon

Project	Role	Status	Sponsor	Description	Current Budget	Project to Date Expenses	Encumbrances	Budget Balance Available
520919	Co-PI	Active	WACHOVIA TRANSFER	C&G Suspense Account	0.00	0.00	0.00	0.00
538003	Lead PI	Active	U S DEPT OF EDUCAT.	ED Clearing Account	0.00	0.00	0.00	0.00
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Total					\$524,053.00	\$226,150.82	\$70,150.94	\$227,751.24

Please note: The Principal Investigator's Employee ID number will be displayed on the search screen. However, it will NOT print on any report. It is solely to assist with the location/identification of the desired PI's report.

Step 7:

Report 8 will automatically open in a new window.

The detailed information about the project will be displayed via Report 8.

Main Menu Download to Excel Add/Remove Personnel Encumbrances

552654: High Speed Rail -- (NC DOT) - OR - 552654 Exact? [] As of today

Report 8 - Project to Date Budget/Expense Summary
As of September 22, 2011
Project/Project Reference: 552654 / 052654

Description:	High Speed Rail Technical Assistance	Budget Period:	08/16/2010 - 07/31/2012
Short Description:	High Speed Rail	Project Period:	08/16/2010 - 07/31/2013
PI Name:	MARTIN, J.	Status:	Active (A)
Sponsor:	NC DOT	F&A Rate:	20% (1st\$25K)
Department:	Inst for Trans Res. & Educ. (062001)		

Description	Budget	Current Month Activity	FYTD/PTD Activity	Encumbrances	Budget Balance
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