

Quick Reference for WRS Report 18

For Principal Investigators

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.
- Users will have the ability to select which projects to include in the search, based on the project status. The **options** 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 3: Select Period

As of today

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[Message History](#) [Payroll Encumbrance Information](#)
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Step 1:

Press the "My Preferences" hyperlink

Step 2:

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

16 - Fiscal Year-to-Date Auxiliary Status
 18 - Summary of Projects by Principal Investigator

Enter Default Report Number (1-16 or 18 from above)

16 - Fiscal Year-to-Date Auxiliary Status
 18 - Summary of Projects by Principal Investigator

Enter Default Report Number (1-16 or 18 from above)

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.

- The benefit of having Report 18 as the default report is it **will** automatically run the **FIRST TIME** WRS is open. When the report automatically runs, the following message will display on the screen while the information is retrieved.

18 - Summary of Projects by Principal Investigator

Step 2: Select / Enter Criteria

Please wait while Report 18 is prepared

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- 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.
- To run Report 18, select it from the list and press the View Report button to initiate the search request.
- As a default, the system will automatically retrieve Active/Pending projects only.

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 Expense	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)
552854	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

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

Step 1:

Select Report 18 from the WRS listing

North Carolina State University Wolfpack Reporting System (WRS)

Step 1: Select Report / Link

Reports	Links
<input type="radio"/> 1 - Fiscal Year-to-Date Financial Status	Chartfield Inquiry
<input type="radio"/> 2 - Project-to-Date Financial Status	Contracts and Grants Attribute Inquiry
<input type="radio"/> 3 - Cash Balance	MS Warehouse Storage Inventory Report
<input type="radio"/> 4 - Financial Status	Position Control
<input type="radio"/> 5 - Financial Summary Status	Report2Web
<input type="radio"/> 6 - Summary by Project Phase	WolfCopy Billing - Monthly Invoices
<input type="radio"/> 7 - Summary by Project Segment	
<input type="radio"/> 8 - Project-to-Date Budget/Expense Summary	
<input type="radio"/> 9 - Detailed Project Expenditures	
<input type="radio"/> 10 - Detailed Project Encumbrances	
<input type="radio"/> 11 - Detailed Payroll Expenditures	
<input type="radio"/> 12 - Detailed Payroll Encumbrances	
<input type="radio"/> 13 - Three Month Comparison	
<input type="radio"/> 14 - Chartfield Specific Balance by Account	
<input type="radio"/> 15 - Fiscal Year-to-Date Center/Institute Status	
<input type="radio"/> 16 - Fiscal Year-to-Date Auxiliary Status	
<input checked="" type="radio"/> 18 - Summary of Projects by Principal Investigator	

Step 2:

Select the Project Status to include:

Step 2: Select / Enter Criteria

Project Status: Active/Pending: Inactive: All:

- **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.

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Step 3:

Select the desired month end period.

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

Step 3: Select Period

As of today ▼

Step 4:

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

Step 4:

View Report

Step 5:

The results screen will display a list of projects

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 your 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 includes 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
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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

Step 7:

Report 8 will automatically open in a new window.

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