**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 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 **Save Preferences** button to save your changes.

**Step 5:**
Press the **Main Menu** 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.
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 button to initiate the search request.

As a default, the system will automatically retrieve Active/Pending projects only.

### 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:

- **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 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.

- 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.

Step 7:
Report 8 will automatically open in a new window.

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