

RF Report Center - Monthly Award or Monthly Project Summary

Goal

You will view the monthly award or monthly project summary and create a PDF report.

Prerequisites

Access to RF Report Center Dashboard 'RF Activity Interface Reporting' or 'Principal Investigator'

Difference Between Award vs. Project Level

Award Level is the summarization of all project(s) that are funded by an award. Project Level is the summarization of all the award(s) that are funding a project.

Steps to view the Monthly Award or Project Summary and Create a PDF Report

- 1. Sign in to the RF Report Center and select the dashboard 'RF Activity Interface Reporting' or 'Principal Investigator' based upon your user access.
- 2. On the RF Activity Interface or Principal Investigator Dashboard, select the tab called 'Monthly Summary."

SUNY RF Report Center	Search All			
Principal Investigator	Home	Catalog Favorites 🔻		
Alerts My PACS Proposals My COEUS Proposals My Grants Budget Overview Tracking People Hawking Advances	Monthly Summary	Credit Distribution Tracking (
Monthly Award Summary By Category				
▶ Monthly Award Summary Reports				
Monthly Project Summary By Category				
Monthly Project Summary Reports				
Monthly Project/Task/Award Summary by Category				

- 3. To view the Award level, open the portlet called 'Monthly Award Summary by Category' or to view the Project level, open the portlet called 'Monthly Project Summary by Category.'
- 4. Using the prompts, enter an Award or Project Number and Month End you would like to view.

5. On the Award or Project, Number click on it to drill to the new MAS/MPS dashboard, as shown in the example below for award level.

Activity Inter	face Repoi	ting						Home	Catalog	Favorites v	Dashboards 🔻	New v	Open 🔻	Si
rts Administrativ	ve Inquiry AP	T Inquiry PACS P	roposal	Accounts Paya	ole Inquiry	Purcha	se Order Inqu	iry People Inqui	y Account	ts Receivable Inqu	iry Cash Receipt Inc	uiry Month	nly Summary	Inqui
Monthly Awa	ard Summar	y Reports												
Monthly Pro	ject Summa	ry Reports												
Monthly Awa	ard Summar	y by Category	4											
Ionthly Awar	rd Summar	y By Category	/											
* Mo	nth End Date:	08/31/2020	•	Award Number :	86892	•	Award Nar	ne :Select Valu	e- 🔻					
Award Principal	Investigator :	Select Value- V	Aw	ard Organization :	Select Va	alue- ▼	Award Stat	US: (All Colum ACTIVE AT_RISK ON_HOLE CLOSED Apply	n Values) Reset v					
rill on Award	d Number t	o retu n categ	jory le	vel detail on t	he award	d for th	he month.							
Month End Date	Award Numb	Award Status	Award	Principal Investiga	tor Award	Organiz	ation Name	Sponsor Name		Award	Name		Budget as	of Me
31-Aug-2020	86802 MAS	by Category		4			i. 9			in		-19 B/2 J/	ו	1,298

- 6. The view returned will display the following sections (each section has an export option when you may only want one section)
 - Monthly Award or Project Summary by Category (as of month-end)
 - Cash Position as of Month-End (as of month-end, only on award view)
 - Outstanding Payroll Encumbrances (note this is an award to date view, not a month-end view as the data changes regularly. The objective is to provide current when viewed)
 - Outstanding Supplier Encumbrances (note this is an award to date view, not a month-end view as the data changes regular. The objective is to provide current when viewed)
 - Outstanding Requisition Encumbrances (note this is an award to date view, not a month-end view as the data changes regular. The objective is to provide current when viewed)
 - Total Payroll from Award Start Date to Month End Selected (provide total payroll including encumbrances by person summary)
 - Award Expenditure Detail for a Month (provide the detail expenditures that occurred in the month)
- 7. To create a PDF Report which will combine all the sections on the view, follow these steps. On the far right, click on the Wheel Icon and select Print > Printable PDF, as shown below.

← → C û û ≜ https://srfappl	p04. rfsuny.org /analytics/saw.dll?Dashb	জন 🕶 🖾 🔍 Se	earch 👱	III\ 🗉 🔮 🗄
🜐 Oracle BI Answers 🔅 Most Visited 🕀 Getting Started (🕀 saw.dll 🛛 🕀 Center for Operational 🧲	🕽 Mysearchdial Search 🛛 🚺 Sugge	sted Sites (115) 🛛 🔽 Suggested Sites (2)	>
SUNY RF Report Center	Search All	2. Click or	nced Administ 1. Click on the Wheel	Sign Out 💷
Monthly Award Summary By Category	Home Catalog Favorites V [Dashboards V Select	Signed In As robin.power	suny.org ▼
		Printable		0
			Edit Dashboard	1 ^
		Printat	ole PDF 📙 Print	• •
SUNY (RF) Monthly Award Summary	By Category	page 1	Export to Excel	•
Award Number:	Month End Date: 31-	Aug-2020	Refresh	
Award Organization:		10g 2020	Create Bookmark Link	
Principal Investigator : 1 January Sponsor Name : January Sponsor : January Sponsor : January Sponsor : January Sp	PI Employee Number: Sponsor ID:		Create Prompted Link	
Award Name : Award Start Date :	Award End Date		Apply Saved Customization	•

8. A PDF Report will generate on your screen, and you can download and save the report.

YOU HAVE SUCCESSFULLY VIEWED AND CREATED A MONTHLY SUMMARY PDF REPORT