

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.

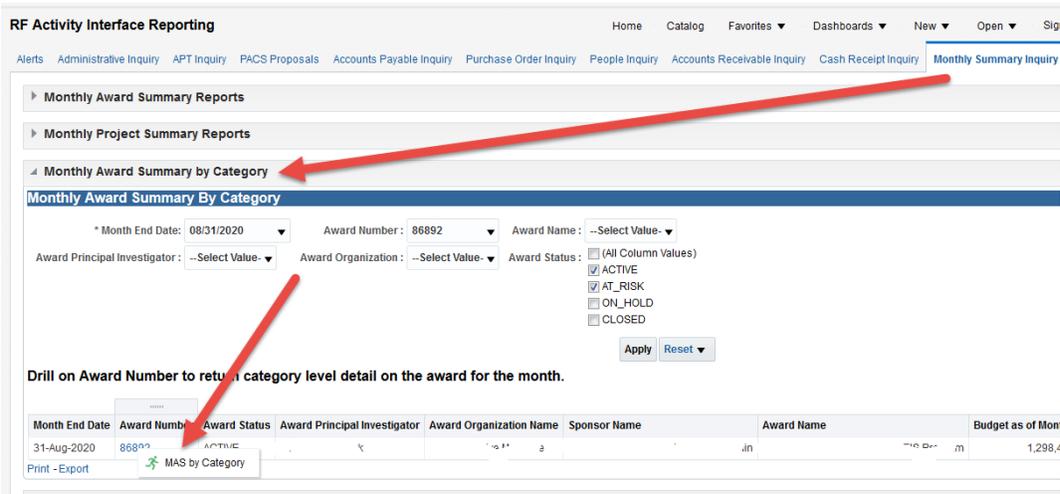
Steps to view the Monthly Award or Project Summary and Create a PDF Report

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.'

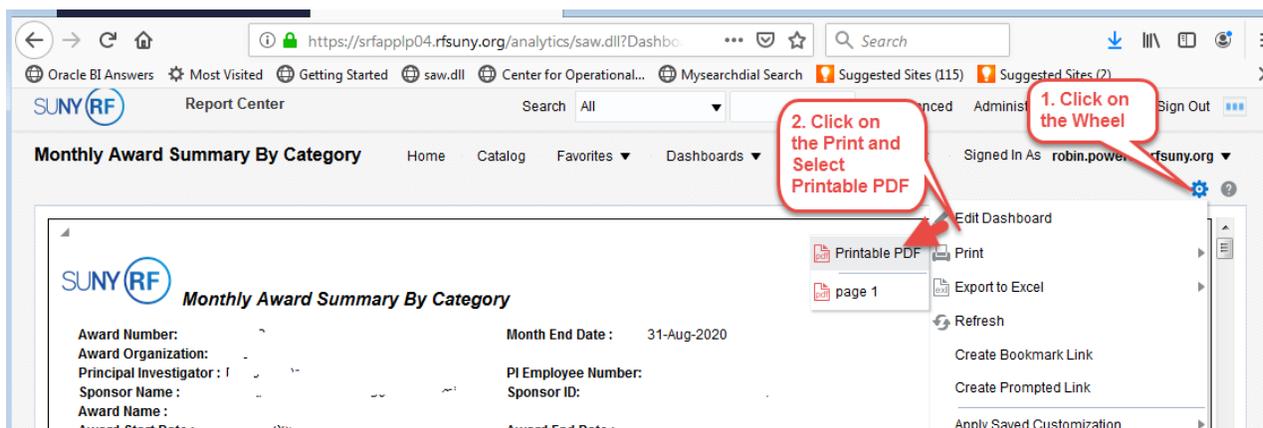


3. To view the Award level, open the portlet called 'Monthly Award Summary by Category' or to view the Project level, open the portlet called 'Monthly Project Summary by Category.'
4. Using the prompts, enter an Award or Project Number and Month End you would like to view.

- 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.



- 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)
- 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.



- 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