

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.

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.

RF Activity Interface Reporting

Home Catalog Favorites Dashboards New Open Sign

Alerts Administrative Inquiry APT Inquiry PACS Proposals Accounts Payable Inquiry Purchase Order Inquiry People Inquiry Accounts Receivable Inquiry Cash Receipt Inquiry **Monthly Summary Inquiry**

Monthly Award Summary Reports

Monthly Project Summary Reports

Monthly Award Summary by Category

Monthly Award Summary By Category

* Month End Date: 08/31/2020 Award Number: 86892 Award Name: --Select Value--

Award Principal Investigator: --Select Value-- Award Organization: --Select Value-- Award Status: ☐ (All Column Values) ☒ ACTIVE ☒ AT_RISK ☐ ON_HOLD ☐ CLOSED

Apply Reset

Drill on Award Number to return category level detail on the award for the month.

Month End Date	Award Number	Award Status	Award Principal Investigator	Award Organization Name	Sponsor Name	Award Name	Budget as of Month
31-Aug-2020	86892	ACTIVE					1,298,4

Print - Export MAS by Category

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 regularly. 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 regularly. 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.

SUNY RF Report Center Search All

Home Catalog Favorites Dashboards

Monthly Award Summary By Category

Month End Date: 31-Aug-2020

Award Number: 86892 Award Organization: PI Employee Number: Sponsor Name: Sponsor ID: Award Name: Award Start Date: Award End Date:

1. Click on the Wheel

2. Click on the Print and Select Printable PDF

Printable PDF Print Export to Excel Refresh Create Bookmark Link Create Prompted Link 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