MyResearch Reports for Grant Managers

The link for MyResearch Reports for Grant Managers includes versions of MyResearch Faculty reports which can be run by Grant Managers in support of their Faculty.

The MyResearch reports were developed specifically for Faculty designated as Person Responsible 1 or 2 (Primary Principal Investigator or Co-Principal Investigator) for WBS Elements and Responsible Person for Cost Centers (specifically for 4xx allocated funds). These reports provide a simplified format that requires no training for those serving as PIs and automatically includes all WBS Elements and Cost Centers tied to a PI or Co-PI in SAP master data for those cost objects.

Faculty have these reports available to use in their MyResearch Home tab on the Duke@WORK portal. These simplified reports are also included in the this link to help those involved in Grants Management view the same reports the Faculty may see under their MyResearch tab and provide support for these reports.

Under the Grants Management tab:

1. Click on the underlined link for MyResearch Reports for Grant Managers.
2. Review the reports and tools available via the underlined links which also include descriptions of the report below the link as outlined briefly below:

- **MyResearch Financial Summary Report** – provides a quick one line overview or summary of the status of all cost objects for a selected PI.
- **MyResearch Summary Awards Statement** – provides a detail view of budget versus actual for award-based research codes based on the report selections.
- **MyResearch Summary Fund Balance Statement** – provides a detail view of the fund balance of the discretionary and other 3xx codes per the report selections.
- **MyResearch Transaction Statement** – provides a list of transactions for Cost Objects (Fund Codes) and G/L Accounts belonging to a selected PI for a specified fiscal period.
- **MyResearch Project Summary Report** – lists all the projects for the selected Principal Investigator (PI) – this list includes proposals, active awards and other funds.
- **MyResearch Personnel Report** – provides a list of all personnel currently funded on fund codes for the selected Principal Investigator (PI), including the percent of effort on the Cost Object (Fund Code) each person.

*Continued on the next page*
MyResearch Reports (cont.)

- **MyResearch Sponsored Required Final Financial Report Status Report** – provides the status of submission of sponsor required financial reports.
- **MyResearch PI Current Effort Distribution Report** – provides the full set of current funding sources for the selected Principal Investigator (PI).

3. Use the **Grants Management Guide** link to access step-by-step instructions for the reports and tools as needed (link not shown in this example).

4. To select a report or a tool, simply **click once on the underlined report or tool title** on the right side of the screen.

5. As an alternative, use the **Detailed Navigation** pane on the left side of the screen to navigate to the report or tool (use the arrow buttons at the top of the Detailed Navigation pane to turn off the pane and display more on the screen as desired).

6. Notice that the path taken to reach the report is listed at the top of the screen below the tabs (also known as “breadcrumbs”) and the links may be used to navigate to previous screens.

**Note:**  
*Each report is outlined in the Guide, including the selections available, the data displayed, the drill-down options, and other advanced functions available in each report.*
Tips for Selecting Criteria for Reports Labeled as MyResearch

On the selection screen for each MyResearch Report, please review the tips below for selecting values for some common fields that are required to generate the reports. Please note that other reports not created for “MyResearch” and Faculty will have different selection steps and those are outlined in the respective reports of this guide.

Calendar Month and Year

1. For the Calendar Month/Year field, be sure to enter the calendar month and year (NOT fiscal month and year) to be selected for the report (format = mm/yyyy).

   Note: This application allows the entry of calendar months and years which will be converted to fiscal months and years to select data for reports. Remember these reports are to support your Faculty, so the fields are different than regular SAP reports.
Finding the Duke Unique ID for a Responsible Person

1. Click on the Drop-down icon in the right side of the field Responsible Person.

2. In the resulting Select Values for Responsible Person screen (shown above):
   - Click on the Drop-down button in the Show view: field
   - Click on Search to select that option.
3. Use the **Person Responsible** field (now displaying at the TOP of the screen) as follows:

- Ensure that **Text** is selected in the first field displayed (drop-down and select if not).
- Enter the last name of the **Principal Investigator (PI) or Co-PI** in all **UPPER case** and **enclosed in asterisks** (*) – (see example show above of "HAYNES").
- Click the **Search** button to display the results of the search.
4. In the *Search* section on the left side of the screen, review the resulting search list and select a Person Responsible / Principal Investigator (PI) as follows:

- Identify the PI desired by either the Key (Duke Unique ID) or Text (Name).
- Click on the box to the left of the desired row to select.

**Note:** *IF TWO NAMES LISTED WITH NUMBERS, CHOOSE THE ONE WITH A NUMBER THAT LOOKS LIKE A DUKE UNIQUE ID OF 5 DIGITS OR MORE* – note that the lower numbers are populated from years ago when numbers were just assigned and are no longer valid entries.

- Click on the **Add** button to display the selected Responsible Person’s Duke Unique ID and Name in the *Selections* section on the right.
- Click the **OK** button to close this window and populate the Duke Unique ID and Name chosen in the Responsible Person field on the previous selection screen.
5. **Review the value populated** for the **Responsible Person** to ensure the correct selection was made.

6. Click **OK** to execute the report when ready.

### Selection Screen Variants

**To save a selection screen variant:**

*Note:* A selection screen variant allows you to populate the selection fields and save that data as a named variant for future use. A variant saves keystrokes by populating the data, and can be changed or deleted as needed.

1. Enter values in the selection fields as desired.

2. In the **Available Variants** field, click on the **Save As...** button.
3. In the **Save Variant** window:
   - Ensure a check mark is displayed in the **Save As User Variant** check box.
   - Enter a name for the variant in the **Description** field (free text, enter a relevant name to help you identify the variant).

4. Click on the **OK** button to complete the save process.

To use a selection screen variant on a selection screen:

1. Click in the **Available Variants** input field and click on the **Drop-down** button to view the available variants.

2. Click on the **variant name/description** to choose the variant and populate the data in the selection fields below.
3. Review the populated selection fields and adjust the data as needed.

To change or delete a selection screen variant:

Note: A selection screen variant allows you to populate the selection fields and save that data as a named variant for future use. A variant saves keystrokes by populating the data, and can be changed or deleted as needed.

1. Click in the Available Variants input field and click on the Drop-down button to view the available variants.

2. Click on the variant name/description to choose the variant to be changed or deleted.
3. To change the variant, make any adjustments to the fields that are populated.

4. Click on the **Save** button to update the variant (to create a new variant use the **Save As...** button and provide a new name).

5. To delete the variant, simply ensure the correct variant is displayed and click on the **Delete** button (this option will remove the variant from the Available Variants list).

   *Note: Use caution when deleting a variant. The Delete function removes the variant from the Available Variants list and cannot be undone.*
MyResearch Financial Summary Report

Note: The report provides a quick one line overview or summary of the status of all cost objects for a selected PI.

1. From the MyResearch Reports page, click on the MyResearch Financial Summary Report (underlined link) to display the report’s selection screen.

On the MyResearch Financial Summary Report Variable Entry page:

2. Enter the calendar month and year (NOT fiscal month and year) to be selected for the report in the Calendar Month/Year field.

   Note: This application allows the entry of calendar months and years which will be converted to fiscal months and years to select data for reports.

3. Enter the Duke Unique ID (DUID) for a particular Principal Investigator (PI) in the Responsible Person field or search by name for the DUID via the steps outlined in the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide.

4. If desired, click on the Check button to display and verify the name associated with the DUID entered in the Responsible Person field (name displays in the Description field).

5. After completing the desired selection fields, click on the OK button.
On the resulting MyResearch Financial Summary Report:

6. Use the right mouse click on columns or line items for advanced functions (see the Other Reporting Functions section of this Guide).

7. Highlighting specific cells or data points in the report.

8. Diagram showing the layout of the financial summary report.

9. Additional data or notes related to the report.
6. Use the Expand tray / Collapse tray buttons to open or close the trays containing each report section (some trays are already open by default).

7. Review the three sections of the report and note the following for each section:

   **First section:** GM Summary Award 1-Line Statement, Direct & Indirect Cost
   - The tray is closed on this section by default, so use the Expand tray to open this section.
   - Compares the Award budget to actual expenditures for both direct and indirect expenditures.

   **Second section:** Projects (Support Summary Award 1-Line Statement - Direct Cost Only)
   - Lists all the award-based 2xx and 3xx sponsored research codes for the PI selected.
   - Compares the Award budget to actual expenditures for direct costs only for the current month, current fiscal year to date, and since the inception of the project.
   - Displays the commitments (encumbrances) along with the remaining balance.
   - Highlights the Ending Balance in red for any code in which the expenses exceed the budget (overexpended).

   **Third section:** GM Support One Line Fund Balance Statement
   - Lists all of your non-sponsored 2xx and 3xx codes such as discretionary codes, gift codes, etc. as well as your 4xx allocated codes.
   - Identifies the Fund Balance at the beginning of the fiscal year, revenues and expenses since the beginning of the fiscal year, and the current ending fund balance.
   - Highlights any fund with an unfavorable ending fund balance by showing that balance in red.
   - Indicates a favorable balance as a credit (negative) amount, and indicates an unfavorable (overexpended) balance as a debit (positive) amount.

8. Use the Legend section at the bottom of the report for tips and instructions on options available, as needed.
9. Review the bottom of each section to see the number of rows currently displayed and the total number rows, and use buttons to scroll up or down as follows:

- Next Line
- Next Page
- Last Entry (Page)
- Previous Line
- Previous Page
- First Entry (Page)

**Note:** To go to a specific line, enter the line item number in the white display field and press Enter on the keyboard.

10. To change the order of the columns and thus the sorting of the report (example from Cost Object view to a PI sorted view, use the click and drag and drop feature with column headings – refer to Other MyResearch Report Functions in the Guide.

11. To perform other report functions (such as Swap… with, Print, or Export as):
   - Use the right mouse click (Windows) OR click (Mac) on column headings or individual line items and click on the desired advanced option.
   - One recommendation for this report is to click on the PI (or Resp. Person) column heading (must click directly on the heading) and use the Change Drilldown > Swap PI with OR Swap Resp. Person with > Cost Object (Fund Code) for useful results.
   - Refer to Other MyResearch Report Functions in the Guide for detailed steps.
MyResearch Summary Awards Statement

Note: The report provides a summary for all of your award-based Cost Objects (Fund Codes).

1. From the MyResearch Reports page, click on the MyResearch Summary Awards Statement (underlined link) to display the report’s selection screen.

On the MyResearch Summary Awards Statement Variable Entry page:

2. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Responsible Person field or search by name to find the DUID per the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide.

3. If desired, click on the Check button to display and verify the name associated with the DUID entered in the Responsible Person field (name displays in the Description field).

4. Enter the calendar month and year (NOT fiscal month and year) to be selected for the report in the Calendar Month/Year field.

   Note: This application allows the entry of calendar months and years which will be converted to fiscal months and years to select data for reports.

5. After completing the desired selection fields, click on the OK button.
Summary Awards Statement (cont.)

On the resulting Support Summary Award Statement:

Note: The default view is for all award based projects to be displayed for the PI selected. Use the Other Reporting Functions section of the Guide to filter to specific cost objects/projects as desired.

6. Review the columns that provide details for each award by the General Ledger account (formerly known as the object code), as outlined below:

- **Cost Object** – Number and description of the seven digit fund code.
- **PI** - Duke Unique ID and name of the Principal Investigator (Person Responsible).
- **Account Description and Account number** – The description and six digit number for each General Ledger (GL) Account (formerly known as object code).
- **ITD Budget** – Inception-to-date Award Budget.
- **Current Month Actual** – Actual expenditures for the fiscal month selected.
- **FYTD Actual** - Fiscal year-to-date actual expenses.
- **ITD Actual** – Inception-to-date actual expenses since the beginning of the project.
- **Commitments** - Any Commitments of purchases to vendors from outstanding Purchase Orders where invoices have not yet been paid to the vendor.
- **Balance** – The balance is calculated as the ITD Budget less ITD Actual less Commitments, and any negative balance will be shown in red.

7. Review the subtotals for major expense categories such as Salaries and Wages, Fringe Benefits, Supplies, Indirect Costs, etc. (note that the default setting is to display the detail for each GL Account, such as 600000, etc., and the subtotals).
8. Use the **Legend** provided at the bottom of each screen to identify the meaning of icons or special characters in the report as outlined in the next steps.

9. If desired, click on the **Collapse (triangle shaped)** button beside each subtotal to **collapse** the report to a more summarized view (see collapsed view above).

   *Note:* If a subtotal is collapsed, use the **Expand (triangle shaped)** button beside each subtotal to **expand** the report back to a more detailed view.

10. Review the bottom of each section to see the number of rows currently displayed and the total number rows, and use buttons to scroll up or down as follows:

    - **Next Line** / **Next Page** / **Last Entry (Page)**
    - **Previous Line** / **Previous Page** / **First Entry (Page)**

   *Note:* To go to a specific line, enter the line item number in the white display field and press Enter on the keyboard.

11. Note that amounts in the **Balance** column for any code in which the expenses exceed the budget (overexpended) are **highlighted in red**.
12. To change the order of the columns and thus the sorting of the report use the **click and drag and drop** feature with column headings –refer to **Other MyResearch Report Functions** in the Guide for the details (NOTE: This is the same as the “Swap with” functionality - example from Cost Object view to a PI sorted view).
MyResearch Summary Fund Balance Statement

Note: The report provides a summary of the fund balance for all of your non-award-based Cost Objects (Fund Codes), including discretionary funds, gift funds, and other non-award funds.

1. From the MyResearch Reports page, click on the MyResearch Summary Fund Balance Statement (underlined link) to display the report’s selection screen.

On the MyResearch Summary Fund Balance Statement Variable Entry page:

2. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Responsible Person field or search by name to find the DUID per the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide.

3. If desired, click on the Check button to display and verify the name associated with the DUID entered in the Responsible Person field (name displays in the Description field).

4. Enter the calendar month and year (NOT fiscal month and year) to be selected for the report in the Calendar Month/Year field.

   Note: This application allows the entry of calendar months and years which will be converted to fiscal months and years to select data for reports.

5. After completing the desired selection fields, click on the OK button.
On the resulting **Summary Fund Balance Statement**: 

6. On the report, review the columns that provide details for each non-award fund by the General Ledger account (object code), as outlined below:

- **Cost Object** – Number and description of the seven digit fund code.
- **Resp. Person** - Duke Unique ID and name of the Principal Investigator (Person Responsible).

**Note:** The default view is for all non-award based projects to be displayed for the PI selected. Use the Other MyResearch Report Functions in the Guide to filter to specific cost objects/projects as desired.
Summary Fund Balance Statement (cont.)

- **Account Description and Account number** – The description and six digit number for each General Ledger (GL) Account (formerly known as object code).
- **Current Month** – Actual expenditures for the fiscal month selected.
- **FYTD Actual** - Fiscal year-to-date actual expenses.

7. Review the **Beginning Balance** rows that display the fund balance at the beginning of the fiscal year for certain Cost Objects (Fund Codes).

8. Review the **Ending Balance** rows that display the ending fund balance as of the fiscal month selected per the guidance below:
   - On this type of report, **favorable balances** are indicated by a credit (negative) amount.
   - Any unfavorable or “overexpended” balances are indicated by a debit (positive) amount and will be shown in red.

9. Review the **subtotals** for Revenues and Expenses (note that the default setting is to display the detail for each GL Account, such as 600000, etc., and the subtotals).

10. Use the **Legend** provided at the bottom of each screen to identify the meaning of icons or special characters in the report as outlined in the next steps.

11. If desired, click on the **Collapse (triangle shaped)** button beside each subtotal to collapse the report to a more summarized view (see collapsed view above).

   **Note:** If a subtotal is collapsed, use the **Expand (triangle shaped)** button beside each subtotal to expand the report back to a more detailed view.

12. Review the bottom of each section to see the number of rows currently displayed and the total number rows, and use buttons to scroll up or down as follows:

   - **Next Line / Next Page / Last Entry (Page)**
   - **Previous Line / Previous Page / First Entry (Page)**

   **Note:** To go to a specific line, enter the line item number in the white display field and press Enter on the keyboard.

13. Note that amounts in the **Balance** column for any code in which the expenses exceed the budget (overexpended) are **highlighted in red**.
14. To change the order of the columns and thus the sorting of the report use the **click and drag and drop** feature with column headings – refer to **Other MyResearch Report Functions** in the Guide for the details (NOTE: This is the same as the “Swap with” functionality - example from Cost Object view to a Responsible Person sorted view).
MyResearch Transaction Statement

Note: The report provides detailed transaction (line item) data for all Cost Objects (Fund Codes) for which you have responsibility.

1. From the MyResearch Reports page, click on the MyResearch Transaction Statement (underlined link) to display the report’s selection screen.

On the My Research Transaction Statement Variable Entry page:

2. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Responsible Person field or search by name to find the DUID per the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide.

3. If desired, click on the Check button to display and verify the name associated with the DUID entered in the Responsible Person field (name displays in the Description field).

4. Enter the calendar month and year (NOT fiscal month and year) to be selected for the report in the Calendar Month/Year field – to display transactions for only one calendar month, enter the same values in from and to fields.

   Note: This application allows the entry of calendar months and years which will be converted to fiscal months and years to select data for reports.

5. After completing the desired selection fields, click OK button.
On the resulting Transaction Statement:

6. On the report, review the columns, subtotals, and totals that provide details for the transactions as outlined below:

- **Cost Object** – Number and description of the seven digit fund code.
- **Account** – The six digit number and description for each General Ledger (GL) Account (formerly known as object code).
- **Document date** – The date of the transaction.
- **Fiscal Month** – The fiscal month in which the transaction was posted.
- **FY** – The Fiscal Year in which the transaction was posted.
- **Line Item Text** – The description of the transaction.
- **Offset Acct Desc** – An additional description; the vendor name will appear in this column if the transaction is for the payment of an Accounts Payable invoice.

7. If there is more than one page, the Page navigation buttons would show under the Grand Total for the report.
Transaction Statement (cont.)

- **Amount** – The amount of the transaction
- **Results rows** – The results rows provide subtotals for each G/L Account as well as Grand Totals by each Cost Object (Fund Code).

7. Use the **Legend** provided at the bottom of each screen to identify the meaning of icons or special characters in the report as outlined in the next steps.

8. Review the bottom of each section to see the number of rows currently displayed and the total number rows, and use buttons to scroll up or down as follows:

   - **Next Line** / **Next Page** / **Last Entry** (Page)
   - **Previous Line** / **Previous Page** / **First Entry** (Page)

   *Note: To go to a specific line, enter the line item number in the white display field and press Enter on the keyboard.*
MyResearch Project Summary Report

Note: The report provides the balance for all projects for a selected PI, including proposals, active awards, and other funds.

1. From the MyResearch Reports page, click on the MyResearch Project Summary Report (underlined link) to display the report’s selection screen.

On the MyResearch Project Summary Report Variable Entry page:

2. Enter the calendar month and year (NOT fiscal month and year) to be selected for the report in the Calendar Month/Year field.
   
   Note: This application allows the entry of calendar months and years which will be converted to fiscal months and years to select data for reports.

3. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Responsible Person field or search by name to find the DUID per the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide:

4. If desired, click on the Check button to display and verify the name associated with the DUID entered in the Responsible Person field (name displays in the Description field).

5. After completing the desired selection fields, click OK button.
On the resulting *MyResearch Project Summary* report:

6. Review the **three sections** of the report as outlined in the next steps – **Proposed Projects**, **Active Projects**, and **Fund Balance**.
Project Summary Report (cont.)

7. **First section: Proposed Projects** – lists each proposed project for the selected PI (recommended that report be selected by PI) and includes the following data elements for each proposal (based on data from the SPS system):

   - **SPS #** - The SPS number associated with the proposal
   - **Proposal Title** – The title of the proposal associated with the SPS number.
   - **Status** – The status of the proposal in the SPS system.
   - **Agency ID** – The ID number of the proposal as provided by the agency. If not yet submitted, then the Agency ID is shown as "not assigned".
   - **Current Budget Start Date** – The proposed start date of the project.
   - **Current Budget End** – The proposed end date of the project.
   - **Sponsor** – the ID of the sponsoring agency or entity.
   - **PI** – the Duke Unique ID and name of the PI on the proposal.
   - **Human Subj** – A Yes indicates Human Subjects are included in the proposal.
   - **Animals** – A Yes indicates that Animals are included as part of the proposal.
   - **Current Annual Directs** – The total Direct Cost budget for the proposal.

8. **Second section: Active Projects** – lists each active awarded grant for the selected PI (recommended that report be selected by PI) and includes the following data elements for each award (based on data from SAP):

   - **Cost Object** – the SAP cost object (fund code) number for the award.
   - **Cost Object Description** – the name of the Cost Object in SAP.
   - **Parent** – If the Cost Object is a subcode, this column contains the parent Fund Code. If the Cost Object is a parent code, then the subcode will be the same value.
   - **SPS #** - The SPS number of the proposal associated with this award.
   - **PI** – the Duke Unique ID and name of the PI in SAP.
   - **BFR** – the 10 digit BFR code and description associated with the project.
   - **Sponsor** – Description of the sponsor as recorded in SAP included the particular agency or institute.
   - **Start Date** – the start date of the project in SAP
   - **Finish Date** – the end date of the project in SAP
   - **Fed** – a Yes means the project is federally funded

   *Continued Next Page*
Project Summary Report (cont.)

- **Balance Direct Costs** – reflects the Balance Available of the Direct Cost budget for the award. This is calculated as Inception-to-Date budget less Inception-to-Date actuals less Commitments. If the actuals plus commitments exceed the budget, the balance will show in red.

- **Balance Total Costs** – reflects the Balance Available of the Total Costs budget for the award, including Direct and F&A (indirect). This is calculated as Inception-to-Date budget less Inception-to-Date actuals less Commitments. If the actuals plus commitments exceed the budget, the balance will show in red.

9. **Third section: Fund Balance** – lists the fund balances for all other non-award based Cost Objects (Fund Codes) including discretionary funds, gift funds, and other non-award funds.

- Refer to the *Summary Fund Balance Statement* section of this Guide for more details on the data in this section.

10. To change the order of the columns and thus the sorting of the report (example from Cost Object view to a PI sorted view, use the click and drag and drop feature with column headings – refer to the *Other MyResearch Report Functions* in the Guide.
MyResearch Personnel Report

Note: The report provides all personnel currently funded on Cost Objects (Fund Codes) for the selected PI, including the percent of effort for each employee on the selected Cost Objects.

1. From the MyResearch Reports page, click on the MyResearch Personnel Report (underlined link) to display the report’s selection screen.

On the MyResearch Personnel Report Variable Entry page:

2. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Responsible Person field or search by name to find the DUID per the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide:

3. After completing the desired selection fields, click Check and OK buttons.

On the resulting MyResearch Personnel Report:

4. Review the columns of data as follows:
   - **Cost Object** - The 7 digit Cost Object (Fund Code) and description.
   - **Person** – the Duke Unique ID (DUID) and name of the employee funded from the Cost Object (Fund Code).
   - **Organizational Unit** – The 8 digit HR/Payroll organizational unit, as well as the associated 10 digit financial Org. Unit (BFR Code) and description to help identify the school or division.
   - **Valid From** – The date that the percentage is valid from based on the most recent cost distribution processed in SAP (could be from a future dated cost distribution if already processed).
   - **Cost Object Percent** – The percentage funded from this Cost Object (Fund Code) for that employee.
MyResearch Sponsor Required Final Financial Report Status

Note: The report provides the status of submission of sponsor required financial reports.

1. From the MyResearch Reports page, click on the MyResearch Sponsor Required Final Financial Report Status Report (underlined link) to display the report’s selection screen.

On the MyResearch Sponsor Required Final Financial Report Status Report Variable Entry page:

2. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Responsible Person field or search by name to find the DUID per the Tips for Selecting Criteria for Reports Labeled as MyResearch section of this Guide:

3. After completing the desired selection fields, click Check and OK buttons.

4. Review the columns of data as follows:
   - **Fund Code** - The 7 digit Cost Object (Fund Code) and description.
   - **Sponsor** – the name of the Sponsor that requires the financial reports for the Cost Object (Fund Code).
   - **Project End Date** – The end date for the Project.
   - **Financial Report** – the type of financial report that is required.
   - **Financial Report Due Date** – the date that the Financial Report is due to the Sponsor.

5. Use this chart for meaning associated with the status of the financial report as needed:

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>INITIAL</td>
<td>Preparation of report not yet complete</td>
</tr>
<tr>
<td>PREPARED</td>
<td>Preparation of report complete, but not yet reviewed and approved</td>
</tr>
<tr>
<td>APPROVED</td>
<td>Report has been approved for submission</td>
</tr>
<tr>
<td>COMP_BNS</td>
<td>Report has been completed but will not be submitted at this time – reasons can vary</td>
</tr>
<tr>
<td>ENTER_OL</td>
<td>Report is ready to be submitted to sponsor on-line</td>
</tr>
<tr>
<td>SUB_OL</td>
<td>Final report was submitted on-line to the sponsor</td>
</tr>
<tr>
<td>SUB_PAPER</td>
<td>Final report was submitted via mail to sponsor (paper)</td>
</tr>
<tr>
<td>CERT_PAPER</td>
<td>Final report was certified by appropriate OSP personnel, awaiting submission</td>
</tr>
<tr>
<td>NOTIFIED</td>
<td>Final report complete</td>
</tr>
</tbody>
</table>

*Note: For assistance with this report, please contact your Office of Sponsored Programs liaison.*
MyResearch PI Current Effort Distribution Report

Note: The report provides a full set of current funding sources for the selected Principal Investigator (PI).

1. From the MyResearch Reports page, click on the MyResearch PI Current Effort Distribution Report (underlined link) to display the report’s selection screen.

On the MyResearch PI Current Effort Distribution Report Variable Entry page:

2. To run the report for a particular Principal Investigator (PI), enter the Duke Unique ID (DUID) for the PI in the Duke Unique ID – Single Value field or search by name to find the DUID per the Tips for Selecting Criteria section of this Guide:

3. After completing the desired selection fields, click Check and OK buttons.

On the resulting MyResearch PI Current Effort Distribution Report:

4. Review the columns of data as follows:
   - **Employee** – the Duke Unique ID (DUID) and name of the selected PI.
   - **Job** – the title associated with the job code.
   - **Organizational Unit of Employee** – the 10 digit BFR Code (Org. Unit) for the funding source (i.e., to which the Cost Object belongs).
   - **Cost Object** – the 7 digit Cost Object (Fund Code) and description.
   - **Valid From** – the beginning date from which the current funding was valid.
   - **Valid To** – the ending date to which the current funding will be valid (if changes are made in the funding source, then the Valid To date will have a fixed end date vs. the open ended date of 12/31/9999).
   - **Cost Object Percent** – The percentage funded from this Cost Object (Fund Code) for the selected PI.
Other MyResearch Report Functions

Note: Most MyResearch reports allow the manipulating of the report data to different views of the report. This includes the click, drag, and drop functionality, as well as the right mouse click functionality. The right mouse click functionality is similar to the functionality in SAP BW for those users that have experience with that tool.

Overview of Report Functions Available

1. Use the click, drag, and drop function to change the view of the report by moving columns of data to provide a different sort/view, for instance, from a cost object view (WBS Element) to a PI (Responsible Person) view (see Swap with steps in next pages).
2. Use the right mouse click (Windows) OR click (Mac) function on either a column heading or individual line item row within the columns of data (such as the 7 digit Cost Object or an amount for current month, FYTD, ITD, etc) to perform the following options:

- **Change Drilldown** – Contains the Swap... with function (name varies by column chosen) to change the analysis presented by “swapping” columns, such as changing from a Cost Object view to a view of the data by PI. This can also easily be done using the click, drag, and drop functionality.

- **Filter** – to filter a report by the selections available.

- **Sort (name varies by column chosen)** – to sort the column of data by text or key (number) in ascending or descending order.

- **Back One Navigation Step OR Back to Start** – to remove/undo a previous function or step performed or to return to the standard view of the report and remove all previous functions.

- **Broadcast and Export** – to export the report to an Excel file or a CSV (Comma Separated Value) file.

- **Print Version** – to print the report (steps vary depending on MyResearch report).

3. Use specific steps in this section of the guide to perform the functions outlined.
Using the “Swap with…” Function to Change View of Data

Note: Use the click, drag, and drop function to easily swap the view of the report data by exchanging the primary column of data with another. The Swap with… function allows you to change the data presented by “swapping” columns, which changes how the report data is sorted, subtotaled and displayed (example, from a display of all amounts by Cost Object (Fund Code) to a display of all amounts by PI). This Swap with… function is also available as a right mouse click option.

1. Note how the original MyResearch report is displayed / sorted (such as listed by Cost Object, then PI or Resp. Person, as many of the reports are sorted).

2. Decide how you would like the report to be displayed / sorted (example: by PI versus by Cost Object).

3. **Click once (left click) and hold the click** on the column heading to be used as the primary view/sort (click right on the text of the column heading – in this example PI) and hold the mouse click while moving the column.

4. Move the cursor/mouse until a **black line indicator** is displayed between columns – position the mouse/cursor so that the black line indicator is to the right of the column to be “swapped”.

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**Image**: Research Financial Summary Report

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**Other MyResearch Report Functions (cont.)**
5. Release the right mouse click to "swap" the column selected with the column to the left of the black line indicator – notice the same report data is now sorted/displayed differently (in this example, by PI instead of by Cost Object).

Filter Data or Refresh the Selection Criteria in a Report

1. From any MyResearch report, right mouse click (Windows) OR click (Mac) on any column or item cell within the report.

2. In the resulting window, click on Filter option and click on the desired option as follows:).
   - Select Filter Value – to filter on selections provided.
   - Variable Screen – to refresh the query using the Variable Entry selection screen to select different values and run a new report.
3. In the resulting window of filter values (varies by column selected and report), click on the gray box beside the values that are to be filtered for the report to select those values (will be highlighted in gold).

4. Click on the Add button to display the selected values on the right side of the screen.

5. Once all selections for the filter are made, click on the OK button to complete the process.

Note: Click on the box beside a selection on the right side under Selections and use the Remove button to “deselect” any items if needed.
6. To remove the filter value if needed, **right mouse click** (Windows) **OR** click (Mac) on any column or item cell within the report.

7. In the resulting window, click on **Filter** option and click on the **Remove Filter Value** option.

### Change the Sort of a Column

1. Simply click on the **triangle icon** beside the **column heading text** to change the sort from the current (example ascending by cost object) to a different option (like descending order).

   **Note:** The **right mouse click** option on the column heading may also be used. In the resulting box, select **Sort** (name varies by column selected) by option and then select from the choices.
Other MyResearch Report Functions (cont.)

Undo Steps or Functions Using the Back Function

1. From any MyResearch report, **right mouse click (Windows) OR click (Mac)** on any column or item cell within the report.

2. In the resulting window, click on **Back** option and choose either option:
   - **Back One Navigation Step** - to undo the latest action taken
   - **Back to Start** – to return to the original standard view of the report and undo all changes or actions taken.
Other MyResearch Report Functions (cont.)

Export a Report

1. From any MyResearch report, right mouse click (Windows) OR click (Mac) on any cell or item within the report.

2. In the resulting window, click on Broadcast and Export option and click on your desired choice as outlined below:
   - CSV File – to create a comma delimited flat file.
   - Export to Excel 2000 – to create an Excel file.

3. In the resulting File Download window (displays for both Excel and CVS choices), click on either Open or Save as outlined below.
   - Open – to open the spreadsheet (or CVS file) directly in Excel and display on your desktop.
   - Save – To save the file at a certain location on your personal computer (this option also allows you to Open the file as well - see next step for more).
Other MyResearch Report Functions (cont.)

4. **If the Save option was selected**, identify a location to save the file on your PC in the resulting Save As window per these steps:

   - Choose the **directory path** in the **Save in** field at the top of the window.
   - Enter a **File name** with the **extension of .xls** at the end of the name.
   - Choose **Microsoft Excel Worksheet** (if not defaulted) in the Save as type field.
   - Click on the **Save** button.

   ![Save As window](image)

   - In the resulting **Download Complete** window, choose **Open** to both save the file and automatically open the Excel file **OR** choose **Close** to return to the report.
Print a Report

1. In the MyResearch report, right mouse click (Windows) OR click (Mac) anywhere in the report (column heading or line item).

2. In the resulting box, click on the Print Version option.

3. In the resulting Export Dialog box, change the Orientation field as desired (choose either Portrait Format or Landscape Format from the Drop-down options).

4. Once choices are made, click on the OK button.
5. In the resulting **File Download** window, click on the **Open** button to view the PDF file via your web browser and to complete the print process (click Save to save a copy of the PDF file on your computer if desired).

6. Depending on your web browser and how the PDF file was displayed, click on the appropriate print icon or use the File menu path to print preview, print, etc.