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*:

10 & 11 Use the right mouse click on columns or line items for advanced functions (see the *Other Reporting Functions* section of this Guide).
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.