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**: 

![Image of 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).