### 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:**

![Variable Entry](image)

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 three sections of the report - Proposed Projects, Active Projects, and Fund Balance (see next steps).

#### 7. 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.

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• **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.