

Printing Monthly Research Statements in PS 8.8

To Print the Monthly Grant Statements for Grant Accounts you have access to:

Navigate: *UWO Menu*

UWO Research

Research/Contract Grants

i) *Add a new Value (first time only, set up run control by naming your print job)*

Click on 'Add'

OR

ii) *Find an existing Value (not first time), select the name of our print job*
Click on 'Search'

Enter the Fiscal Year and Period for the reports that you want.

- Enter the department number to print one org at a time
- Enter one project (research grant) number.
- Enter the first 5 characters of a researcher's grant number followed by a '%' to print all the research statements for one researcher
- Leave department and project fields blank to print the monthly statements for all your research accounts

Check the box marked 'Consolidate Info to one Department'

Depending on whether or not you want the Summary Page only, or the Summary and Detail Spent/Encumbered Pages, Check or Uncheck the box marked 'Print Detail on Report'.


Research/Contract Grants

Run Control ID: PrintReport [Report Manager](#) [Process Monitor](#)

Research Grant/Contract Report (UFGSL030)

'Fiscal Year: 'Accounting Period:

Chartfield-----		Group
Department	<input type="text"/>	OR <input type="text"/>
Project	<input type="text"/>	

View Group 

Leave a field blank to select all its values.

Consolidate Information to one Department

Print Detail on Report (Unchecked will print only Summary pages)

Sort by ORG then Grant (Unchecked will sort by Grant then ORG)

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Click on 'Save'.

Click on 'Run'.

If printing all research statements for one or more department codes (orgs) it is suggested that these be run to the Web. **Processing time is dependent on the volume of users on the system at a particular time.** You will be able to continue using/processing in PeopleSoft and you can retrieve your report by navigating through 'Reporting Tools' (see below for instructions) at a later time.

Once triggered to run, you can even shut down your computer. Your report will be waiting for you when you re-boot your system, by navigating through 'Reporting Tools' (see below for instructions).

Ensure the *Type Window says 'Web' and *Format Window says 'PDF'.

Click on 'OK'.

Process Scheduler Request

User ID: DBABCOCK Run Control ID: PrintReport

Server Name: PSUNX Run Date: 03/08/2005
Recurrence: Run Time: 8:51:55AM [Reset to Current Date/Time](#)
Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	
<input checked="" type="checkbox"/>	Research Grant/Contract Report	UFSGL030	SQR Process	Web	PDF	

[OK](#) [Cancel](#)

Retrieving your report using the Process Monitor:

When running a report to the Web, PS will flip back to the previous screen, but the report is processing. Click on 'Process Monitor' (top right) to determine the status of your report (i.e. queued, processing, success). Click on 'Refresh' (top right) periodically, until the 'Run Status' indicates 'Success'.

Click on 'Details', which takes you to the 'Process Detail' screen.

Click on 'View Log/Trace' (bottom right) and then select the ufsgl030 report.

Retrieving your report using Reporting Tools:

Reporting Tools

Report Manager

Open

General

Select the UFSGL030 report

Select the ufsgl030 report again

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The Monthly Statements will appear in Adobe Acrobat on your screen. You can save (Save Icon) and print (Print Icon) this document.

Acrobat Reader - [test.pdf]

File Edit Document Tools View Window Help

88%

Report ID: UFGGL010
Run Date: 02/02/2005
Run Time: 15:58:47
Grant/Contract No.: R3152A01

The University of Western Ontario
Research Grant/Contract Financial Report
As at - November 30, 2003
Month End Status: FINAL

DINOSYSTEM use only
Fiscal Year/Acct Period: 2004/ 7
Consolidate: Y
Detail Print/Sorted By: Y / P&J

SUMMARY

7
Physiology and Pharmacology
OEG: 370450

Agency Name: CANADIAN INSTITUTES OF HEALTH RESEARCH
OPERATING GRANT
Agency Reference: HCG 43899

Project Name : Role of RHO Gtpases in Chrono
Budget Period : 2004-04-01 TO 2005-02-31
Project Period: 2004-04-01 TO 2005-02-31

Revenues				
Balance Forward		\$	-10,304.48	
Revenue		\$	85,844.00	
Transfers		\$	0.00	
Total Revenues		\$	75,539.52	

Expenses		Budget	Spent	Encumbered
601360	Salary - Res. Grad Student	\$ 0.00	\$ 10,511.25	\$ 2,941.66
601460	Salary - Res. Post Doc Fell.	\$ 0.00	\$ 19,500.00	\$ 5,600.00
605420	Computer - PC's	\$ 0.00	\$ 2,977.14	\$ 0.00
611100	DOGS - Animals	\$ 0.00	\$ 1,325.46	\$ 0.00
622000	Supplies	\$ 0.00	\$ 16,417.31	\$ 326.50
645000	Travel - General	\$ 0.00	\$ 2,454.32	\$ 0.00
Total Restricted		\$ 0.00	\$ 2,454.32	\$ 0.00
Total Unrestricted		\$ 75,539.52	\$ 73,205.48	\$ 8,948.16
Total		\$ 75,539.52	\$ 73,205.48	\$ 8,948.16

*** Budget has been exceeded by ***
\$ -1,694.12

1 of 5 11 x 8.5 in

Use the Binocular Icon to search for the specific grant number that you want:



Click on the Printer Icon  and select only the pages that you want to print.

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A monthly statement can be run directly to your computer when printing only one research account.

Ensure the *Type Window says 'Window' and *Format Window says 'PDF'.

Click on 'OK'.

Process Scheduler Request

User ID: MLEGAUL2 **Run Control ID:** Monthly_Grant_Statement

Server Name: PSUNX **Run Date:** 02/02/2005

Recurrence: **Run Time:** 3:58:08PM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	
<input checked="" type="checkbox"/>	Research Grant/Contract Report	UFSGLO30	SQR Process	Window <input type="button" value="v"/>	PDF <input type="button" value="v"/>	