

Printing Monthly Statements for a PI

Navigate: *UWO Menu*
UWO Research
Grant Detail by Researcher

Then, choose one:

If this is your first time running Grant Detail by Researcher, set up a new Run Control as follows:

Click on 'Add a New Value'

In the 'Run Control ID' field, enter Statements_by_Researcher

Click on 'Add'

If this is not your first time running Grant Detail by Researcher, enter the name of your Run Control, or click on 'Search' to find and select it.

Next:

Enter the desired Fiscal Year (*we are currently in Fiscal Year 2015*).

Enter the desired Accounting Period. (*Period 1 = May, Period 2 = June, Period 3 = July, etc.*)

Enter the Researcher Profile number associated with your research projects in the Researcher Profile 'From' and 'To' boxes.

Click on 'Exclude Closed Grants'.

Click on 'Print Journal Detail' box.

Favorites | Main Menu > UWO Menu > UWO Research > Grant Detail by Researcher

Grant Detail by Researcher

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

Research Grant Report (UFSRA101)

*Fiscal Year: 2014 *Accounting Period: 1

Researcher Profile

*Researcher Profile From: R0464

*Researcher Profile To: R0464

Exclude Closed Grants (Unchecked will print both Active and Inactive Grants)

Print Detail (Unchecked will print summary data only)


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Click on the 'Save' button, in the bottom left.

Click on the 'Run' button, in the top right.

Process Scheduler Request

User ID: MLEGAUL2 Run Control ID: New_Monthly_Statement

Server Name: Run Date: 

Recurrence: Run Time:

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Grant Detail by Researcher	UFSRA101	Crystal	Window	PDF	Distribution

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

Click on the 'OK' button in the bottom left.

The statements will appear in .pdf format in a new window. You can save or print the statements from that window.