Research Foundation Web Reports User Guide

Updated: March 3, 2014

Report Web Site: https://reports.foundation.fsu.edu

Log In:

Open report web site using Internet Explorer Browser.

Please use your FSUID login to log on to reports site.

Enter your FSUID (OMNI User Name) as the Username.

Enter your FSUID password.

Trouble with Accessing the Web Reports:

In order to gain access to the Web Reports, you must have a web access form completed, signed by your supervisor, and submitted to the Research Foundation. You can obtain an access form on the Research Foundation's website. http://www.research.fsu.edu/foundation/forms.html . The form is titled Access to Research Foundation Projects. Submit the form to the following:

Alexander Priest

FSU Research Foundation

MC 2744

apriest@fsu.edu

The password must contain the following characteristics:

1. Be at least 8 characters in length
2. Have at least one symbol (!@#$, etc)
3. Contain no part of your name
4. Contain one capital letter
5. Must not contain any easy to guess words
6. Cannot be in a date format

If your password does not contain the above characteristics, go to http://fsuid.fsu.edu, login, on the left side of the screen, under **Quick Links**, select "Reset Password." Reset your password with the above characteristics.

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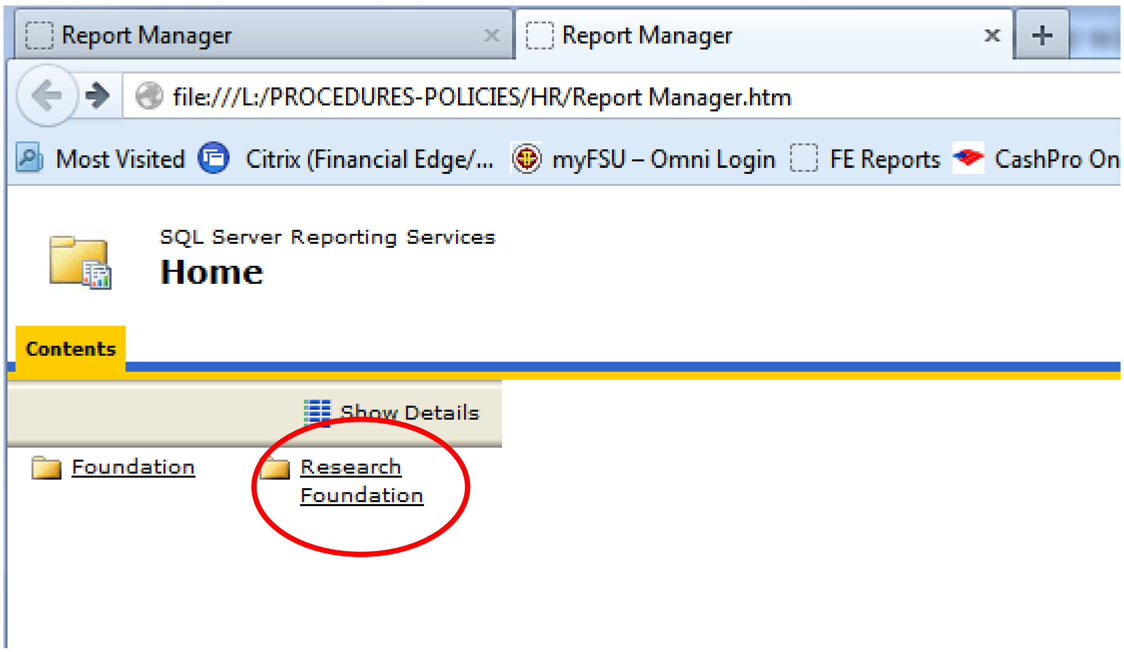
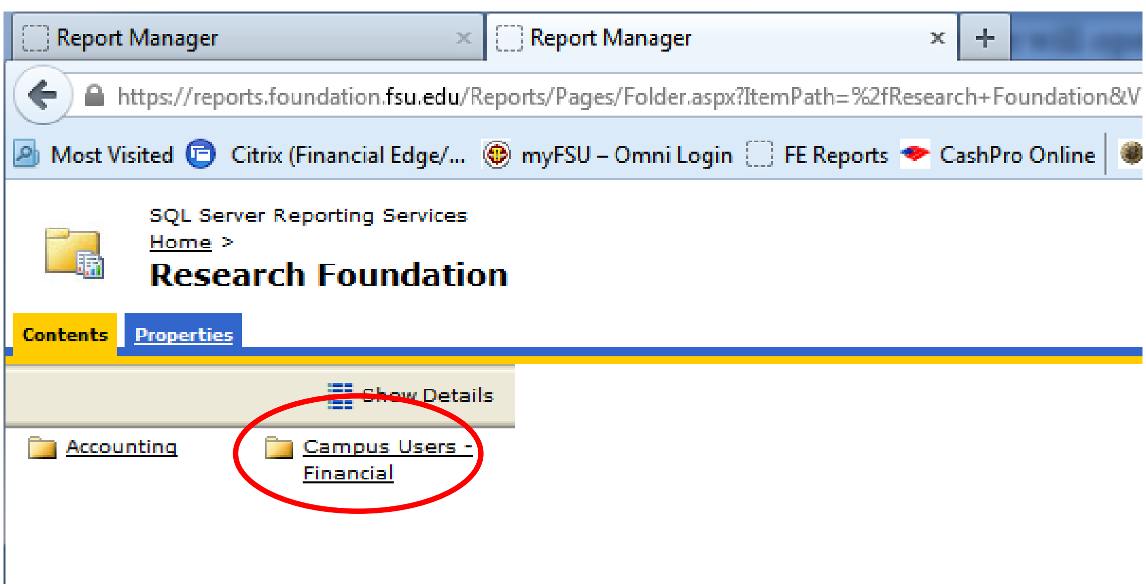
After you have successfully logged in; your browser will open to the SQL Server Reporting Services Home page. Select the "Research Foundation" folder then "Campus Users-Financial". The FSU Research Foundation Financial Reports folder contain 7 reports that you have been authorized to view.





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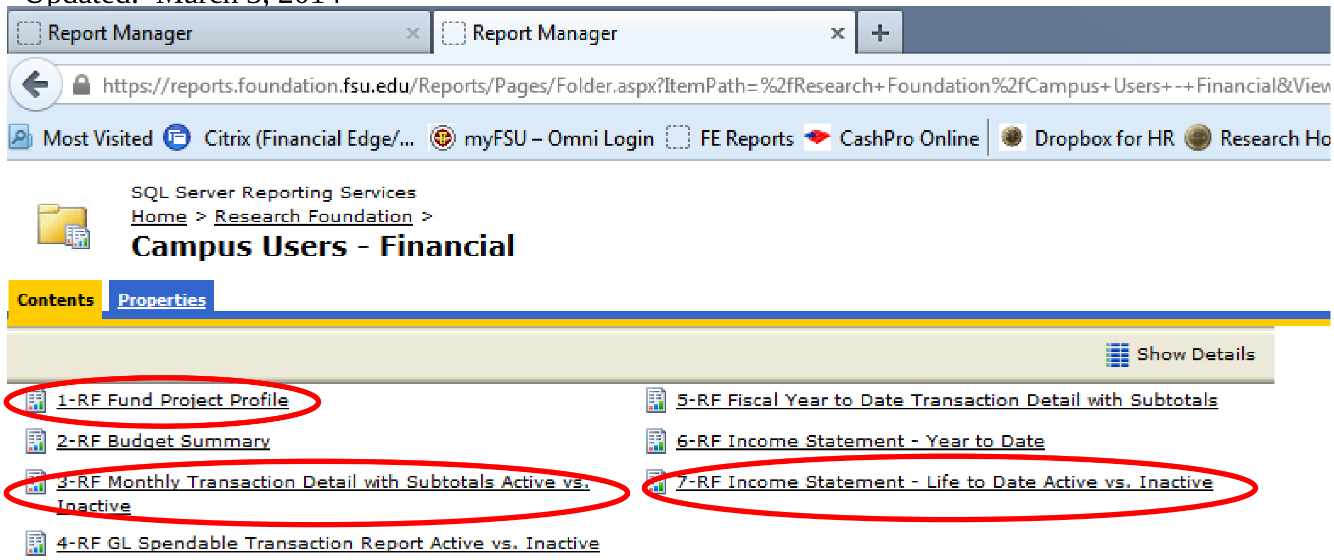

The reports most helpful for departmental use will be 1, 3 and 7:

1-RF Fund Project Profile- This report will provide current information including type, unit, department, authorized signers, indirect cost rates, and restrictions.

3-RF Fiscal Monthly Transaction Detail with Subtotals Active vs. Inactive- Will provide your monthly transaction detail. If you require data over several months you can use report 5 or contact your Grant Analyst.

7-RF Income Statement-Life to Date Active vs. Inactive- Will provide the revenue and expenses for the entire life of the project.

Note The data can be as current as yesterday's transactions by putting the current month. To get end of month transactions use the last month that has been finalized by FSURF. Reports are usually finalized within 6 business days of the previous month end.

For a more detailed explanation of your report contact your grant analyst or sign up for our training sessions.

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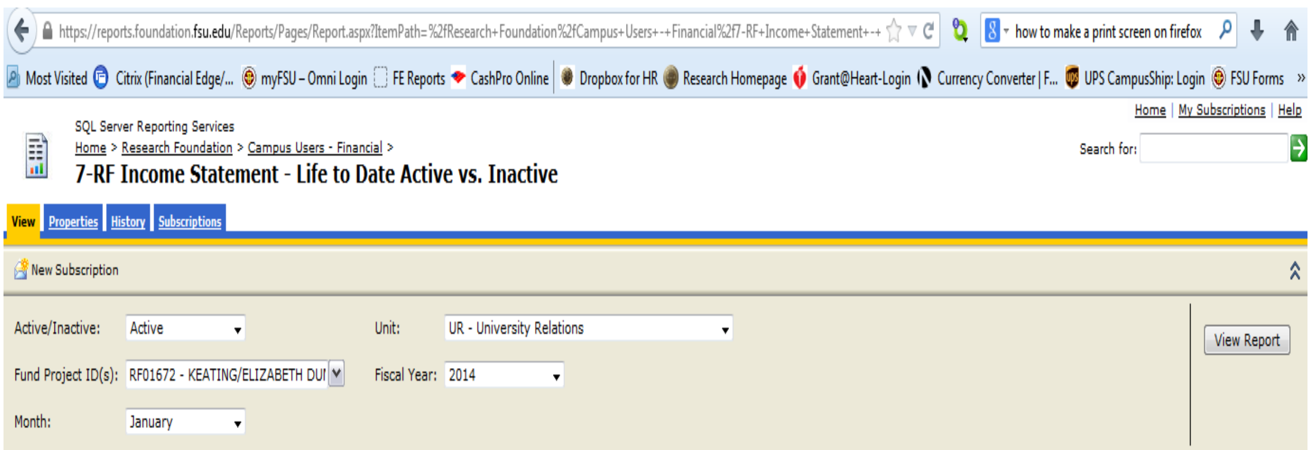
Research Foundation Reports:

The reports will be updated each business day with the previous days' transactions. Subsequent to the end of each month, the Research Foundation will notify via email all FE Web Report users that salaries have been uploaded and all journal entries have been posted to the Research Foundation accounting system. The previous month will be closed at that time and no further transactions will be posted to that month. The departments can then begin their reconciliations.

Sample Income Statement – Life to Date Report



1. First select active/inactive, the screen will refresh and unit can be entered.
2. Select the unit, the screen will refresh and the project can be entered.
3. Use the drop down box to find your project. If project not available then either the wrong unit was selected or the project is inactive. Contact your Grant Analyst to verify.
4. Select the Fiscal Year, the screen will refresh and then select the Month
5. Click view report. This could take a few seconds or longer depending on the number of transactions.

The Month to Date column expense amounts in the Income Statement – Life to Date report should agree with the expense amounts in the Monthly Transaction Detail.

https://reports.foundation.fsu.edu/Reports/Pages/Report.aspx?ItemPath=%2fResearch+Foundation%2fCampus+Users+-+Financial%2f7-RF+Income+Statement+-+

Most Visited | Citrix (Financial Edge/... | myFSU – Omni Login | FE Reports | CashPro Online | Dropbox for HR | Research Homepage | Grant@Heart-Login | Currency

SQL Server Reporting Services
Home > Research Foundation > Campus Users - Financial >

7-RF Income Statement - Life to Date Active vs. Inactive

View | Properties | History | Subscriptions

New Subscription

Active/Inactive: Active
Unit: UR - University Relations
Fund Project ID(s): RF01672 - KEATING/ELIZABETH DUI
Fiscal Year: 2014
Month: January

1 of 1 | Select a format | Export

Florida State University Foundation

Run Date: 3/6/2014 10:11:32 AM

Research Foundation Life to Date Income Statement

RF01672 - KEATING/ELIZABETH DUNN

Life to Date Thru Period Ending 1/31/2014

Account Category	Account Code	Account	Month to Date	LTD Budget	Life to Date	LTD Encumbrance	LTD Balance
Revenue	4000	Contract & Grant Revenue	$0.00	$0.00	$42,000.00	$0.00	$42,000.00
Total Revenue			**$0.00**	**$0.00**	**$42,000.00**	**$0.00**	**$42,000.00**
Expense	5100	Contractual Services	$0.00	$0.00	($1,260.00)	$0.00	($1,260.00)
	5204	Domestic Travel	($244.41)	$0.00	($35,373.85)	$0.00	($35,373.85)
	5216	Other Expenses	$0.00	$0.00	($222.00)	$0.00	($222.00)
	5900	Unrestricted Budget	$0.00	$42,000.00	$0.00	$0.00	$42,000.00
Total Expense			**($244.41)**	**$42,000.00**	**($36,855.85)**	**$0.00**	**$5,144.15**
Transfer	7100	Intra Transfer In	$0.00	$0.00	$0.00	$0.00	$0.00
	7199	Intra Transfer Out	$0.00	$0.00	$0.00	$0.00	$0.00
Total Transfer			**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Sum of Expenses and Transfers			**($244.41)**	**$42,000.00**	**($36,855.85)**	**$0.00**	**$5,144.15**

7-RF Income Statement - Life to Date Active vs. Inactive - Confidential   Page 1 of 1   Date: 3/6/2014 10:11:32 AM

Research Foundation Web Reports User Guide

Updated: March 3, 2014

SQL Server Reporting Services

Home > Research Foundation > Campus Users - Financial >

3-RF Monthly Transaction Detail with Subtotals Active vs. Inactive

View | Properties | History | Subscriptions

New Subscription

Active/Inactive: Active

Unit: UR - University Relations

Project ID: RF01672 - KEATING/ELIZABETH DUI

Fiscal Year: 2014

Month: January

1 of 1 Select a format Export

Florida State University

Run Date: 3/6/2014 10:54:45 AM

Research Foundation Monthly Transaction Detail

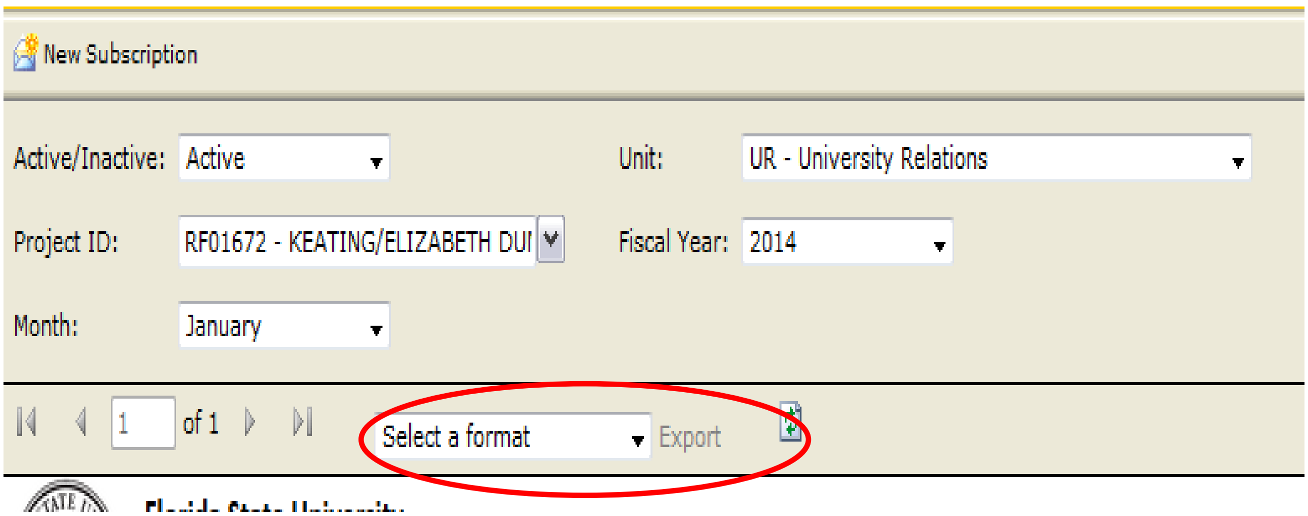
RF01672 - KEATING/ELIZABETH DUNN - 1/1/2014 thru 1/31/2014

Account/Post Date	Batch	Source	Reference	Transaction Amount
1000 - Cash (1)				**($244.41)**
1/24/2014	30237-096	Accounts Payable	SASCHA CORDNER-Computer Check-85709	($244.41)
5204 - Domestic Travel (1)				**($244.41)**
1/24/2014	30232-105	Accounts Payable	SASCHA CORDNER-INDIAN RIVER STUDY-STUDY OF MASSIVE INDIAN RIVER ANIMAL DEATHS IN SOU	($244.41)

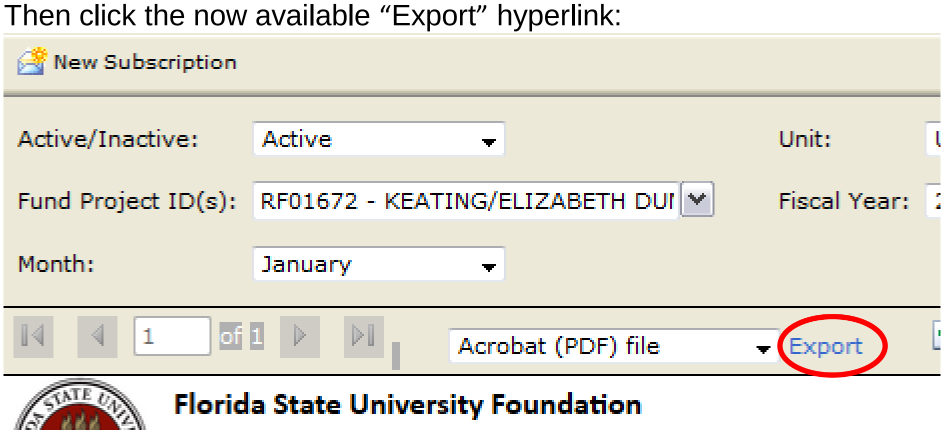
3-RF Monthly Transaction Detail with Subtotals Active vs. Inactive - Confidential   Page 1 of 1   Date: 3/6/2014 10:54:45 AM

Print reports and export:

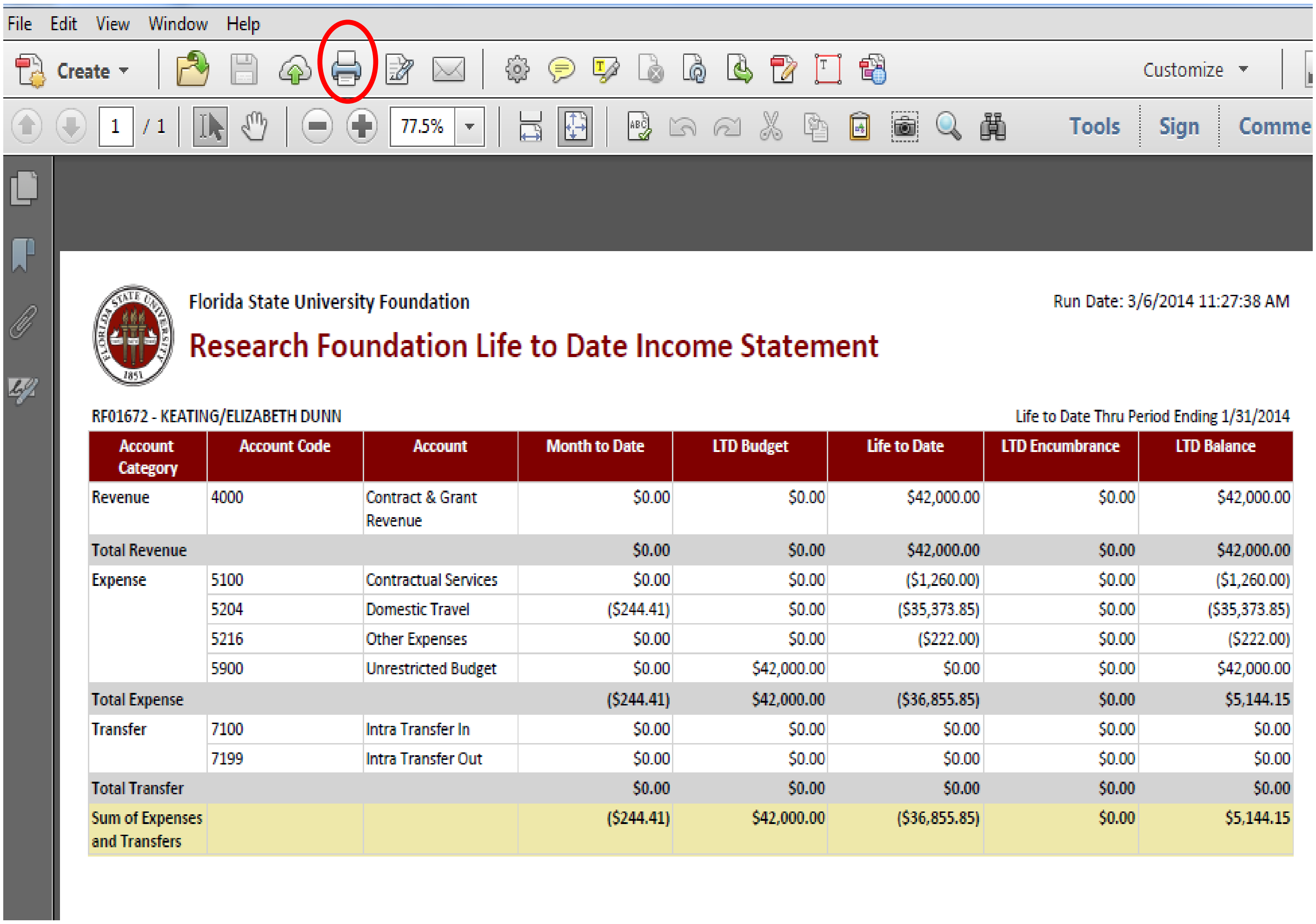
To print reports select a format such as PDF or Word.



Then click the now available "Export" hyperlink:



The report will open into another window and the print option will be available.



Florida State University Foundation

Run Date: 3/6/2014 11:27:38 AM

Research Foundation Life to Date Income Statement

RF01672 - KEATING/ELIZABETH DUNN

Life to Date Thru Period Ending 1/31/2014

Account Category	Account Code	Account	Month to Date	LTD Budget	Life to Date	LTD Encumbrance	LTD Balance
Revenue	4000	Contract & Grant Revenue	$0.00	$0.00	$42,000.00	$0.00	$42,000.00
Total Revenue			$0.00	$0.00	$42,000.00	$0.00	$42,000.00
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	7199	Intra Transfer Out	$0.00	$0.00	$0.00	$0.00	$0.00
Total Transfer			$0.00	$0.00	$0.00	$0.00	$0.00
Sum of Expenses and Transfers			($244.41)	$42,000.00	($36,855.85)	$0.00	$5,144.15

Troubleshooting Printing Errors:

Error message: "Unable to load client print control".

> **Reason**: The Reporting Services Print Control is an Active X object. This control needs to be downloaded and installed.
>
> **Resolution**: From Internet Explorer menu, click on Tools, select Tools\Internet Options\Security\Custom Level. You can select the settings to allow downloading of Active X controls to enable report printing.

Helpful Hints:

When a "+" or "-" sign appears in front of an account or total, you may click on the box to expand or collapse the detail.

Log Off

The SQL Server Reporting Services does not have a sign-off or log-off button. When you have finished viewing your reports, close your web browser. This will disconnect you from the report server.

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Quick List Navigation:

- **Active/Inactive-** Certain reports require you select this option.
- **Unit–** Click on the down arrow. You will see a list of all of the colleges/units. The correct unit must be selected that corresponds to the project that will be entered, otherwise the report will not generate.
- **Project –** Type in the desired project. The project must be in the following format: it must contain RF and five digits. Example: RF12345.
- **Fiscal Year –** Select the fiscal year to view. Reports are available from 1994 through current year.
- **Fiscal Month –** Select the month to view. For the monthly transactions reports only the month selected will be viewed.
- **View Report –** Click on the "View Report" button to see the report generated based on your selections.
- **Page Navigation –** Use to view individual pages in a report.
- **Size –** Defaults to 100%. Report can be sized for easier viewing.
- **Find –** Enter key word in the Find box and the report will be searched. Very useful if looking for a specific cash transaction in a month with many transactions.
- **Export –** Select a format using the down arrow. The listed formats include Excel, PDF, and other file formats. After selecting format, click on Export. Select Open and the report will open in the format you selected. (A separate blank browser window may open during the export process depending on your selection.)
- **Refresh –** Click on the Refresh Icon to refresh your report.