

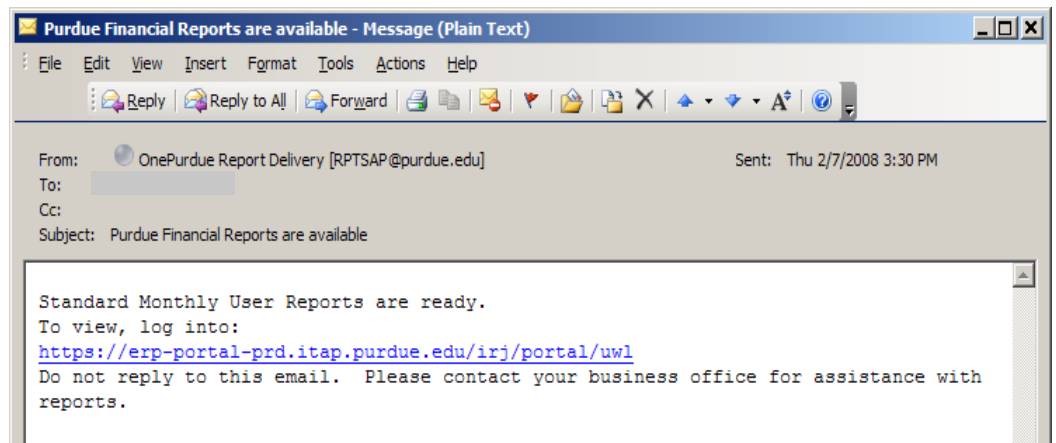


Accessing Monthly Financial Reports

To View Your Monthly Financial Report

When the report is ready and accessible you will receive an e-mail notification with a link to your reports.

Click on the link. It will take you to the OnePurdue Portal Login page.

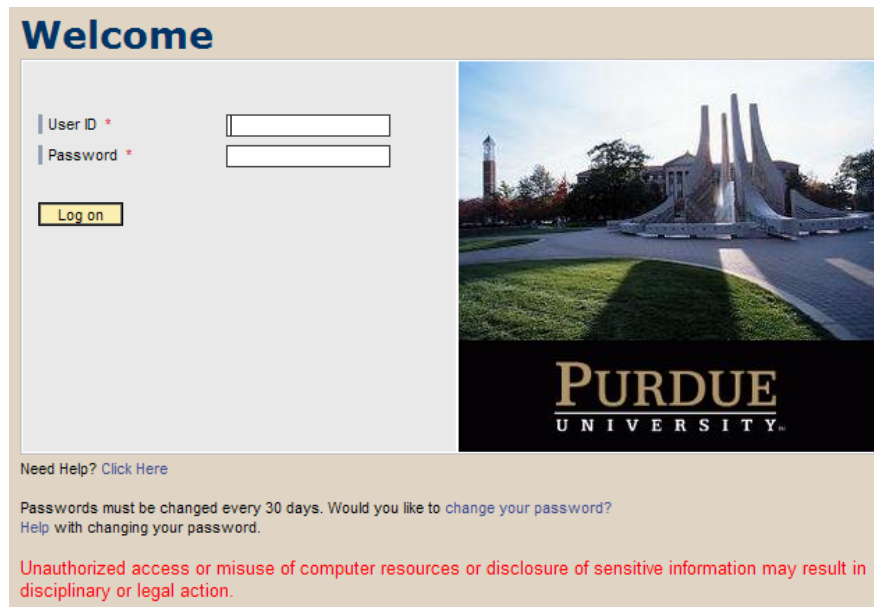


Log into the OnePurdue portal using your career account login and password

Click Log on

(Please ensure Pop-up Blockers allow purdue.edu as an exception.)

Note: If an error message (“User authentication failed”) appears, your OnePurdue Login has expired. You will need to change your career account password. For help call 49-46000.



To add purdue.edu as an allowable address for the Pop-Up Blocker in Internet Explorer browser:

Click on Tools→Internet Options→Privacy Tab→ and in the *Pop-up Blocker* section click on Settings.

In the *Address of Web site to allow:* section, type **.purdue.edu*.

Click on Add → Close → OK

For further information:

<http://help.itap.purdue.edu/viewarticle.php?articleid=2363>



Accessing Monthly Financial Reports

You will see a list of Reports that are assigned to you.

Note: Reports are only accessible online for **TWO Months (Current and Prior Month)** from the time they were sent to you. If you want to view these reports beyond two months you will need to save them in a secure location.

To view a report:

1. Click on the line of the report
 - o A link to a PDF file will appear in the lower part of the window below the list of reports:
2. Click on the link to open up the PDF file.

(Example of Project Financial Report in Sponsored Program View)

The screenshot shows a web portal interface. At the top, there is a navigation bar with tabs: Home, Employee Self-Service, Manager Self-Service, AIMS, Financial Systems, Purchasing Services, Human Resources, Effort Reporting, System Info, Home, and Bl. Below this is a sub-menu with Info, Launcher, Work, and General Test Area. A Notifications section is visible on the left. The main content area displays a table of reports:

MTHLY BUD RPT-PJBOWER	Report Delivery	Today	Normal	1
PROJ FIN RPT-PJBOWER	Report Delivery	Today	Normal	1
PROJ FIN RPT-PJBOWER	Report Delivery	Today	Normal	1
PROJ FIN RPT-PJBOWER	Report Delivery	Today	Normal	1
MTHLY TRANS RPT-PJBOWER	Report Delivery	Yesterday	Normal	1
PROJ FIN RPT-PJBOWER	Report Delivery	Yesterday	Normal	1
MTHLY BUD RPT-PJBOWER	Report Delivery	Yesterday	Normal	1
FSSR REPORTS FOR-PJBOWER		Jan 16, 2008	Normal	1

Below the table, there is a 'Row 1 of 24' indicator and a 'Complete' button. The detailed view of the selected report shows:

PROJ FIN RPT-PJBOWER
 Status: New Priority: Normal
 Sent: Jan 18, 2008 1:00 PM by Report Delivery
 Attached is your Report

Attachments

[PROJ FIN RPT by Report Delivery \(PDF 183 KB\)](#)

At the bottom of the detailed view are buttons for 'Complete', 'Forward', and 'Delete'.

Note: If you are already logged into the portal for other reasons and would like to access your work list.

Click on the **Work** tab in the menu bar (Your individual menu bar may look different than your colleagues depending upon your security roles)

The screenshot shows the top of the Purdue University portal. The 'PURDUE UNIVERSITY' logo is at the top. Below it is a navigation bar with tabs: Home, Employee Self-Service, AIMS, Financial Systems, Info, Work, and Launcher. The 'Work' tab is highlighted with a red box.



Accessing Monthly Financial Reports

The report will appear in a separate window similar to this:

(Example of Project Financial Report in Grant View)

01/18/2008 Project Financial Report

Grant View

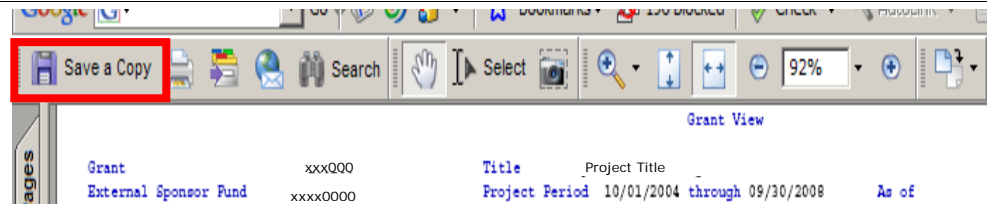
Grant	xxx000	Title	Project Title		
External Sponsor Fund	xxxx0000	Project Period	10/01/2004 through 09/30/2008	As of	06/30/2007
Sponsored Award No	xxxx0000	Sponsor In	Family And Social Services Admin	Status	Award / Approved Award
Responsible Cost Center	xx-xx-MM-0000	...I. LastName, FirstName			
	xxxx001000				

Description	Budget	June 2007 Expenses	Life to Date Expenses	Commitments	Available Balance	
Professional Salary	79210	135,040.72	0.00	67,915.22	0.00	67,125.50
Clerical Salaries	79240	47,444.00	0.00	43,189.73	0.00	4,254.27
Service Salaries	79250	254,517.75	0.00	566,174.09	0.00	211,656.34
Total Salaries & Wages		537,002.47	0.00	677,279.04	0.00	140,276.57
Fringe Benefits	79280	659,452.00	0.00	560,441.49	0.00	99,010.51
Total Benefits		659,452.00	0.00	560,441.49	0.00	99,010.51
Consultants	79410	2,000.00	0.00	0.00	0.00	2,000.00
Communications	79420	7,000.00	0.00	5,227.79	0.00	1,772.21
Travel	79430	72,000.00	0.00	72,014.12	0.00	14.12
Publication / Duplic	79435	0.00	0.00	10,873.22	0.00	10,873.22
Other S&P	79499	110,190.00	0.00	58,959.09	0.00	51,230.91
Genrl Purpose Equip	79530	5,000.00	0.00	0.00	0.00	5,000.00
Total Supplies & Expenses		196,190.00	0.00	147,074.22	0.00	49,115.78
Total Direct Costs		1,391,644.47	0.00	1,384,794.75	0.00	6,849.72
Indirect Costs	79310	72,355.53	0.00	72,355.53	0.00	0.00
Total Sponsor Costs		1,464,000.00	0.00	1,457,150.28	0.00	6,849.72
Professional Salary	79210	569,021.24	0.00	570,478.54	0.00	1,457.30

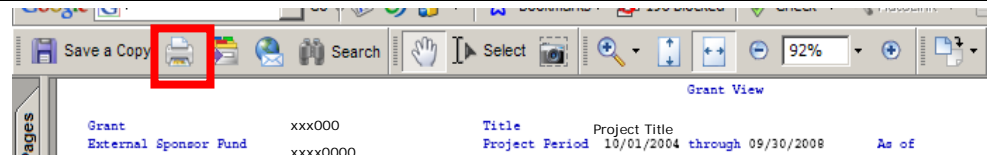
To Save Reports in a secure location click the "Save A Copy" button in the toolbar.

Note: Data security guidelines need to be followed as defined in the link below.

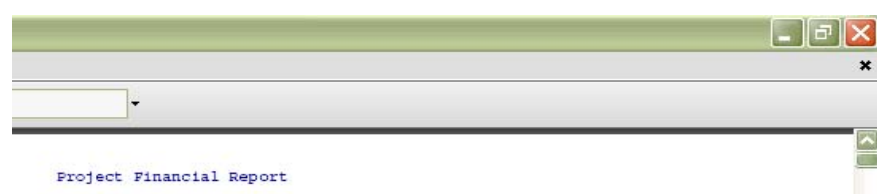
<http://www.itap.purdue.edu/security/procedures/dataHandling/electrStored.cfm>



To Print Reports click the "Print" Icon in the toolbar



To exit out of the report click the X button in the right hand corner of the screen or minimize the screen to open up other reports





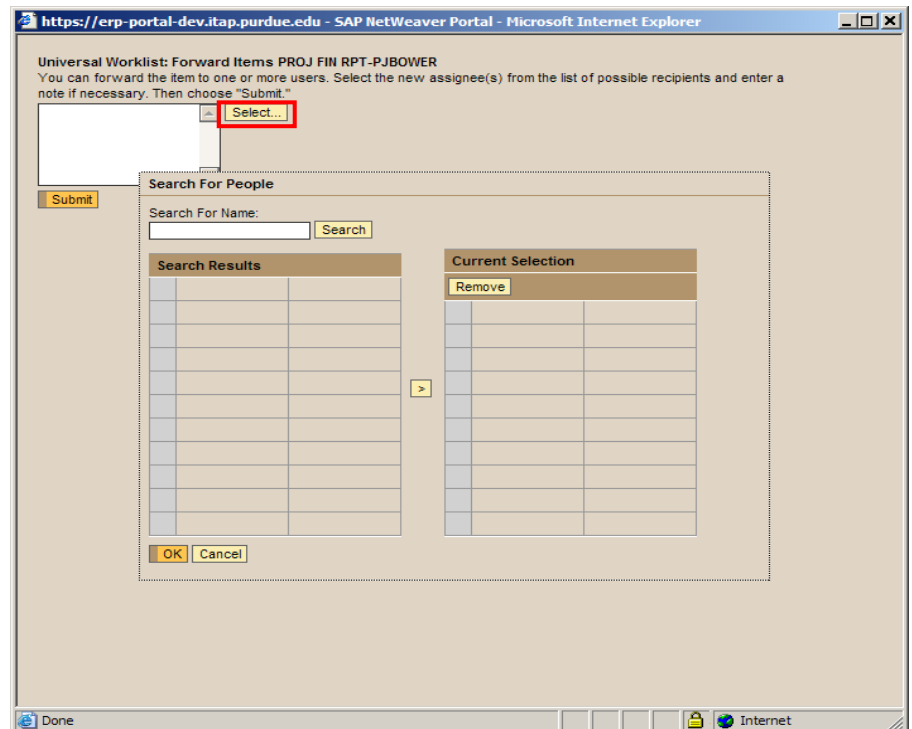
Accessing Monthly Financial Reports

To Forward Your Monthly Financial Report to another user's Universal Work List

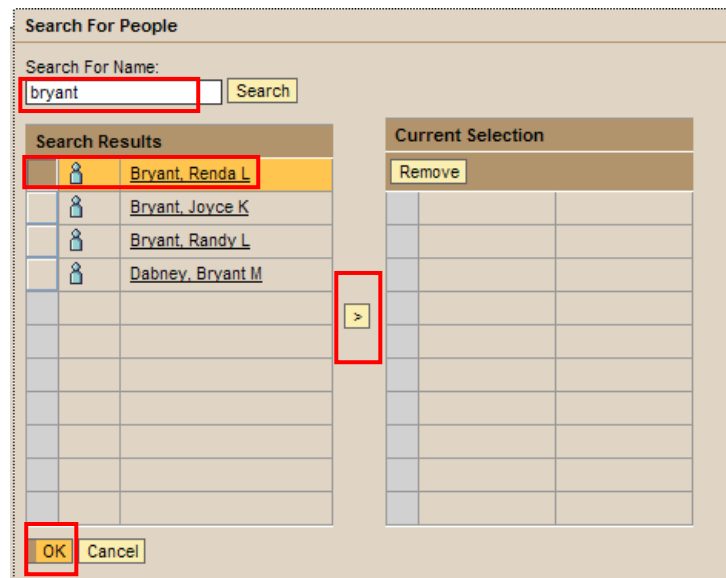
1. Click on the Forward button
 - a. A new window will open up



2. Click the select button
 - a. A box will appear to search for names



3. Type the last name in the search box and click Search
 - a. Select the appropriate name(s) by clicking the box on the left hand side of the search results
 - b. Add them to the current selection list by clicking on the arrow button
 - c. Click OK when you are done selecting names





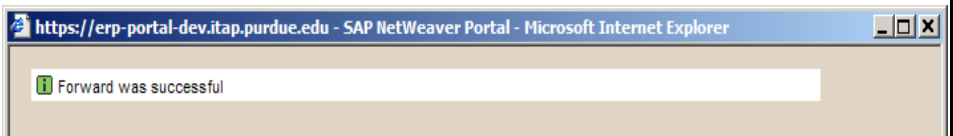
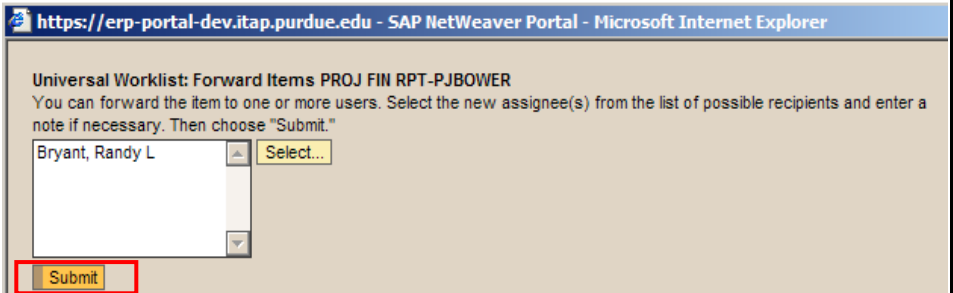
Accessing Monthly Financial Reports

4. Once you have selected the name(s) you would like to send the report to click the "Submit" button

- a. The following message will appear and a report will be sent directly to the individual(s) Universal Work List

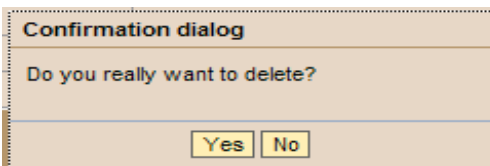
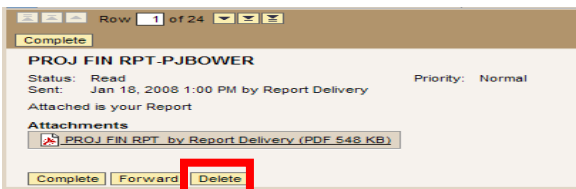
NOTE: An automated e-mail will not be sent notifying the user that the report is in their Universal Work List.

PLEASE NOTIFY THE INDIVIDUAL(S) THAT YOU SENT THE REPORT(S) TO THEM.



To Delete Your Monthly Financial Report

1. Click on the Delete button
2. A box will appear to confirm that you want to indeed delete the report.
 - a. Click YES to delete
 - b. Click NO to cancel
3. If you clicked YES the selected report will be deleted and removed from your Universal Work List





Accessing Monthly Financial Reports

Using the Complete Button

When a PDF document is displayed in the Work List Screen clicking the "Complete" button changes the Status from NEW to READ.

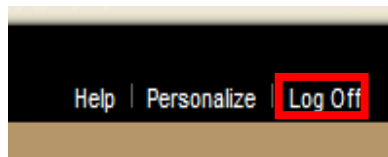


How to Exit the Work List Screen

When you are done viewing your Monthly Reports you have the following options:

1. Click the Log Off button, located in the right corner, to log out of the portal but still keep the Browser open
2. Since the Universal Work List is in the OnePurdue Portal you can use any of the other functionalities you have in the portal (i.e. Employee Self-Service, AIMS)

(Your individual menu bar may look different than your colleagues depending upon your security roles)



For further information regarding reporting please go to:

<http://www.purdue.edu/onepurdue/resources/reporting/mofinreports.shtml>