

**PSLite**                       

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**HOME**  
 Enter a Project, Award, PI last name, Program Mgr last name, Program, Speedtype, OR Org Number (YOU ONLY NEED 1 CHART FIELD) in the blue column. Next, select a report associated with that number (in the same horizontal row) from the drop-down box in one of the 3 "REPORTS" columns.

Enter Number	REPORTS			Journal Detail
	Cumulative Summaries thru a Specific Acct Period	Detail for Acct Period (or Range of Acct Periods)	Detail Within a Range of Dates (can cross Fiscal Years) or ALL detail (no dates)	
PROJECT: 1541955	Fiscal Year: 2015 Acct Period: 9	Fiscal year: 2013 Begin Period: End Period:	Begin Date: End Date:	Journal ID: Date: (optional) SELECT
AWARD:	Select Report from drop-down	Select Report from drop-down	Select Report from drop-down	FIND JOURNAL (by Journal Source)
Princ. Last Name    P.I. Last Name	SUMMARY SUMMARY W F&A ENC SUMMARY W REVENUE ACCOUNT SUMMARY ACCOUNT SUMMARY W F&A ENC ACCOUNT SUMMARY W REVENUE BALANCE SHEET BS TRANSACTIONS OUTSTANDING ENCUMBRANCES SUBCLASS CROSSTAB ANALYZE F and A LOC POOL REPORT			Fiscal Year: 2013 Begin Period: End Period: Journal Source:
PROGRAM:				
SPDTYPE:				
ORG:				

## SUMMARY

Not currently planned for m-Fin. Please consider using the SUMMARY W F&A ENC reports.

- **15-SEP-2015: m-Fin REVENUE AND EXPENDITURE SUMMARY** Unselect REVENUES. Choose EXTRAS that do not encumber F&A. This report pages by speedtype.

## SUMMARY W F&A ENC

- **m-Fin PROJECT FINANCIAL STATUS**
- **m-Fin EXPENDITURE TYPE SUMMARY** Unselect REVENUES. This report pages by speedtype.
- **m-Fin REVENUE AND EXPENDITURE TOTAL** Unselect REVENUES. See last page of output.
- **m-Fin BAE BY MONTH – SUMMARY** This report pages by speedtype.

## SUMMARY W REVENUE

- **m-Fin PROJECT FINANCIAL STATUS**
- **m-Fin EXPENDITURE TYPE SUMMARY** This report pages by speedtype.
- **m-Fin REVENUE AND EXPENDITURE TOTAL** See last page of output.

## ACCOUNT SUMMARY

Not currently planned for m-Fin. Please consider using the ACCOUNT SUMMARY W F&A ENC reports.

- **15-SEP-2015: m-Fin REVENUE AND EXPENDITURE SUMMARY** Unselect REVENUES. Choose EXTRAS that do not encumber F&A. This report pages by speedtype.

## **ACCOUNT SUMMARY W F&A ENC**

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- **m-Fin REVENUE AND EXPENDITURE SUMMARY** Unselect REVENUES. This report pages by speedtype.

## **ACCOUNT SUMMARY W REVENUE**

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- **m-Fin REVENUE AND EXPENDITURE SUMMARY** This report pages by speedtype.

## **BALANCE SHEET**

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- **m-Fin BALANCE SHEET TOTAL**
- **m-Fin BALANCE SHEET SUMMARY** This report pages by speedtype.

## **BS TRANSACTIONS**

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- **m-Fin FINANCIAL DETAIL** Use the *Next* button and then select assets and liabilities in LEVEL03. Select TRANSACTION TYPE: ACTUALS.

## **OUTSTANDING ENCUMBRANCES**

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- **m-Fin OUTSTANDING ENCUMBRANCES** This report pages by speedtype

## **SUBCLASS CROSTAB**

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Not currently planned for m-Fin. For actuals please consider using m-Fin ACCOUNT NUMBER.

## **ANALYZE F AND A**

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Not currently planned for m-Fin.

## **LOC POOL REPORT**

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- **Project Reports > m-Fin LOC POOL**

**PSLite**    **ORG TREE**    **LOOK-UPS**    **BUILD-A-QUERY**    **GROUPS**    **FRS**    **CUSTOM**

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		REPORTS			Journal Detail
		Cumulative Summaries thru a Specific Acct Period	Detail for Acct Period (or Range of Acct Periods)	Detail Within a Range of Dates (can cross Fiscal Years)	
		Fiscal Year: 2013	Fiscal year: 2015	or ALL detail (no dates)	Journal ID: <input type="text"/>
		Acct Period: <input type="text"/>	Begin Period: 1	Begin Date: <input type="text"/>	Date: <input type="text"/>
			End Period: 8	End Date: <input type="text"/>	(optional)
					<b>SELECT</b>
					<input type="text"/>
					<b>FIND JOURNAL</b>
					(by Journal Source)
					Fiscal Year: 2013
					Begin Period: <input type="text"/>
					End Period: <input type="text"/>
					Journal Source: <input type="text"/>
					<input type="text"/>

**Enter Number**

PROJECT: 1541955

AWARD:

Princ. Last Name  P.I. Last Name

PROGRAM:

SPDTYPE:

ORG:

Select Report from drop-down

Select Report from drop-down

Select Report from drop-down

DETAIL BY RANGE-RPT  
 DETAIL BY RANGE-EXPORT  
 DETAIL BY ACCOUNT-EXPORT  
 BS TRANSACTIONS BY RANGE-RPT  
 BS TRANSACTIONS BY RANGE-EXPORT  
 MONTHLY BY BUDGET POOL-REPORT  
 MONTHLY BY BUDGET POOL-EXPORT  
 ENCUMBRANCE DETAIL-EXPORT  
 BRS DETAIL

**DETAIL BY RANGE-RPT**  
**DETAIL BY RANGE-EXPORT**

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- **m-Fin FINANCIAL DETAIL**

**DETAIL BY ACCOUNT-EXPORT**  
**BS TRANSACTIONS BY RANGE-RPT**  
**BS TRANSACTIONS BY RANGE-EXPORT**

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- **m-Fin FINANCIAL DETAIL** Select desired accounts on second page of prompting (use the *Next* button).

**MONTHLY BY BUDGET POOL-REPORT**  
**MONTHLY BY BUDGET POOL-EXPORT**

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- **m-Fin BAE BY MONTH - SUMMARY** This report pages by speedtype.

**ENCUMBRANCE DETAIL-EXPORT**

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- **m-Fin FINANCIAL DETAIL** Select TRANSACTION TYPE: ENCUMBRANCE on second page of prompting (use the *Next* button).

**BRS DETAIL**

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Not currently planned for m-Fin.

**PSLite**    **ORG TREE**    **LOOK-UPS**    **BUILD-A-QUERY**    **GROUPS**    **FRS**    **CUSTOM**

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		REPORTS			Journal Detail
		Cumulative Summaries thru a Specific Acct Period	Detail for Acct Period (or Range of Acct Periods)	Detail Within a Range of Dates (can cross Fiscal Years) or ALL detail (no dates)	Journal ID: <input type="text"/>
		Fiscal Year: 2013	Fiscal year: 2015	Begin Date: 3/1/2015	Date: <input type="text"/>
		Acct Period: <input type="text"/>	Begin Period: <input type="text"/>	End Date: 3/31/2015	(optional)
		End Period: <input type="text"/>			<b>SELECT</b>
					<input type="text"/>
					<b>FIND JOURNAL</b>
					(by Journal Source)
<b>Enter Number</b>	<b>Select Report from drop-down</b>	<b>Select Report from drop-down</b>	<b>Select Report from drop-down</b>		
PROJECT: 1541955	<input type="text"/>	<input type="text"/>	<input type="text"/>		
AWARD: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Princ. Last Name <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
P.I. Last Name <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
PROGRAM: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
SPDTYPE: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
ORG: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

**PROJECT DETAIL-ALL**  
 PROJECT DETAIL BY DATE-REPORT  
 PROJECT DETAIL BY DATE-EXPORT  
 PROJECT DETAIL BY DATE-EXPORT-SHORT  
 MONTHLY SUMMARY-EXPORT  
 MONTHLY SUMMARY-REPORT (12 months max)  
 PAY DETAIL BY ACCT BY CAMPUS

**PROJECT DETAIL ALL**  
**PROJECT DETAIL BY DATE-REPORT**  
**PROJECT DETAIL BY DATE-EXPORT**  
**PROJECT DETAIL BY DATE-EXPORT SHORT**

- **m-Fin FINANCIAL DETAIL** This report selects with accounting period rather than date. Select TRANSACTION TYPE: ACTUALS on second page of prompting (use the *Next* button).
- **Project Reports > m-Fin PROJECT ACTUALS DETAIL**

**MONTHLY SUMMARY-EXPORT**  
**MONTHLY SUMMARY-REPORT (12 months max)**

This is planned for m-Fin.

**PAY DETAIL BY ACCT BY CAMPUS**

Not currently planned for m-Fin. Please consider m-Fin FINANCIAL DETAIL and m-Fin PAYROLL FISCAL YEAR DETAIL. For all pay for a person, m-Fin PAYROLL TRANSACTIONS.