The Rockefeller University
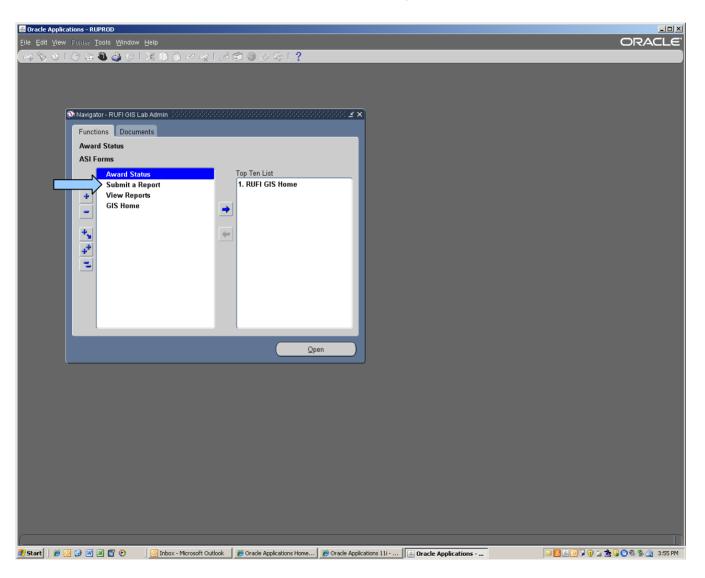
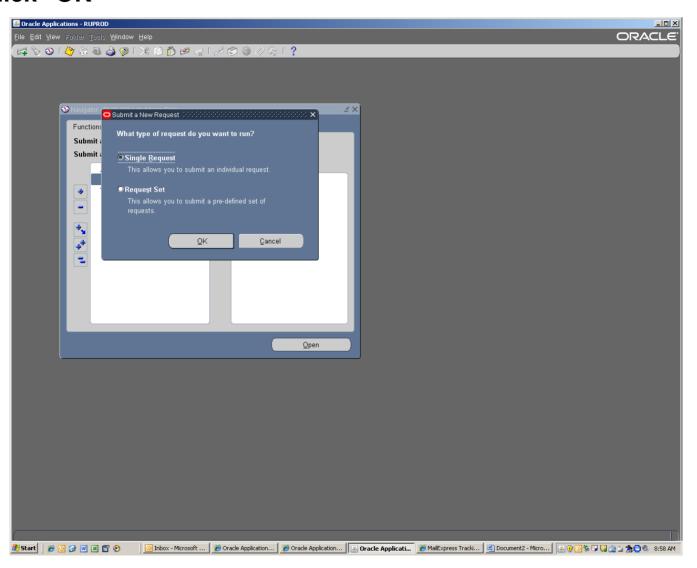## Electronic Reporting Application Guide

Introduction

- In response to The Rockefeller University effort to reduce excessive paper reporting, the Finance Office is now able to offer an electronic reporting application which can be used by individual departments and laboratories to run monthly reports.

- Users will have the capability to run their monthly individual award reports, lab summary reports and the option of a year to date detailed report.

- Users will have the option to print select pages or the entire report.

- This new tool is accessible through your current Oracle log in. The following pages provide step-by-step instructions on running the reports as well as screen prints to help users through the new application.

Instructions

- **After logging into Oracle, access the electronic reporting application by navigating to one of the following:**

    - **RUFI GIS Lab Admin**

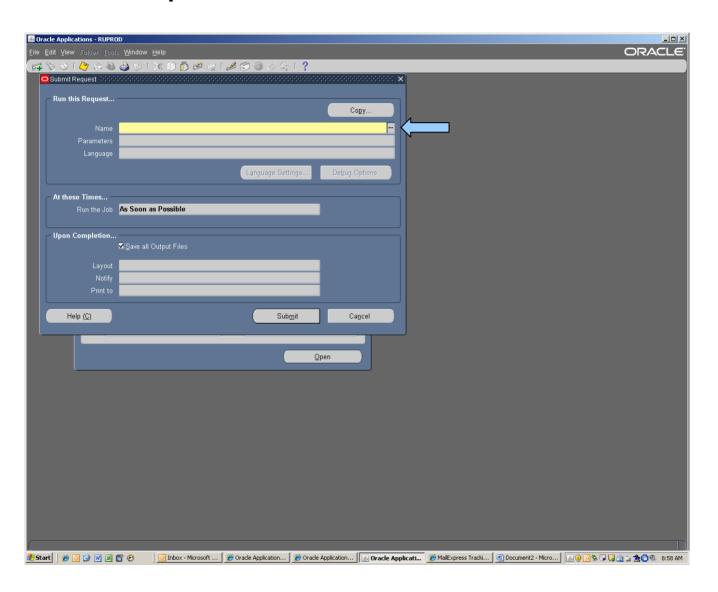   - **RUFI GIS Lab User**

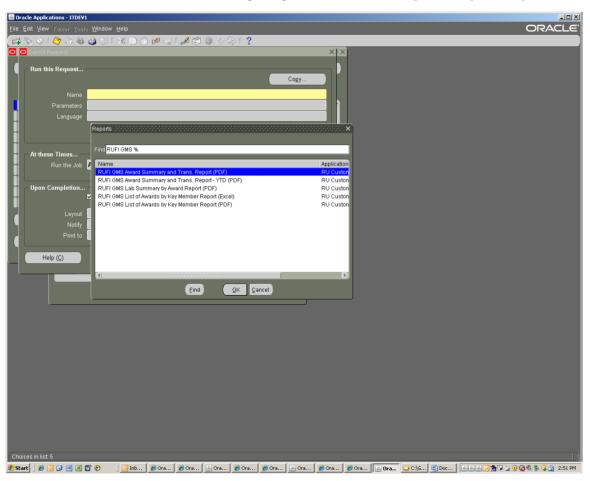   - **RUFI GIS Lab Admin**

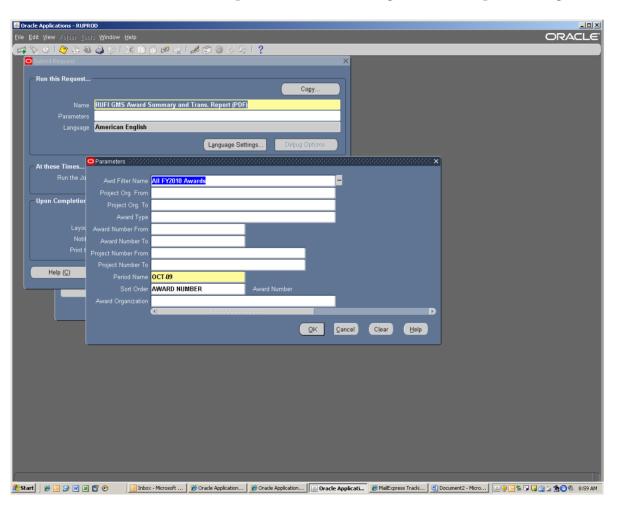- **From menu list choose "Submit a Report"**

- **Click "OK"**

4

- **Click on the drop-down box to view list of values**
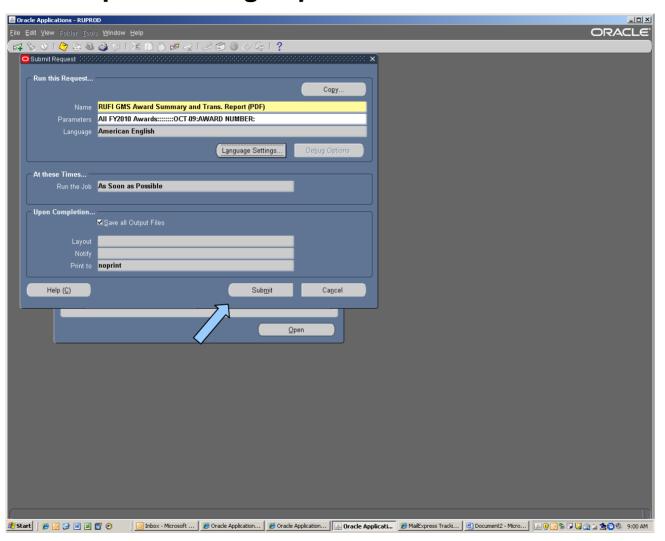

5

Instructions

- **Choose the report you wish to run:**
  - **RUFI GMS Award Summary and Trans Report (PDF) or**
  - **RUFI GMS Award Summary and Trans Report – YTD (PDF) or**
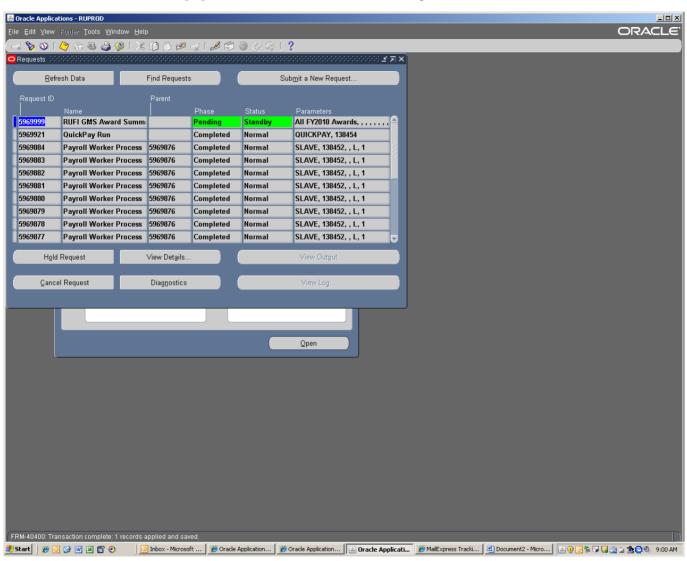 - **RUFI GMS Lab Summary by Award Report (PDF)**

6

- **If you click OK a report will be produced with all awards on which you are listed as a key member. Choosing parameters from the fields shown below will produce only the reports you need.**
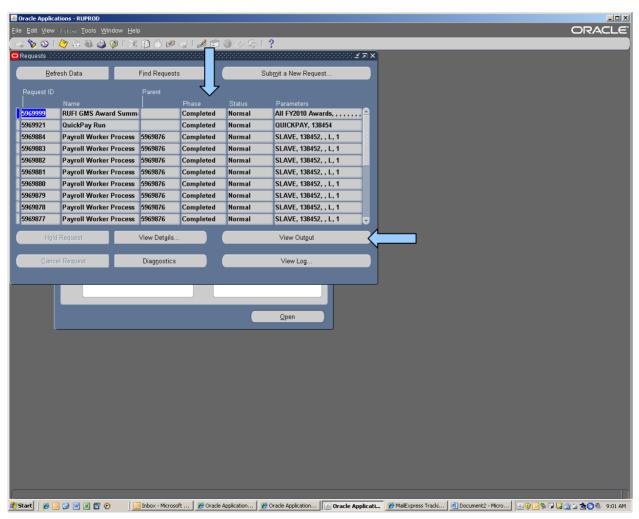
Instructions

- **When completed filling in parameters click "Submit"**

Instructions

- **This form will appear automatically.**

- **The report has been generated when phase indicates completed and status is normal. Click "View Output" and report will appear as a PDF.**

- As of today, you have access to run the reports on-line.

- We will be issuing hardcopy reports through December 31, 2009 month-end close.

- After January 1, 2010 you will no longer receive the hardcopy monthly reports and will need to run the reports electronically.

- For access issues please contact:
  - Toby Fishman x 8305 - fishman@mail.rockefeller.edu

- If you have any questions please contact:
  - Regina Metz x 8347 (Labs)
  - Robin Maloney x 7736 (Administrative and Research Support Departments)