



Research Information System

Guide for Users

Last Updated on 14 January 2015

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Faculty Research Support & Client Services

Research Financial Analysts provide support for financial related inquiries, listed below are the contacts:

Faculty Research Support - Research Accounts Support Officers (RASO):

Faculty of Arts: Tammy Fuoco, ext 4194

Faculty of Communication & Design: Gowry Sivapathasundaram, ext 2381

Ted Roger's School of Management: Galina Oussatcheva, ext 4692

Faculty of Community Services: Freeman Chow, ext 4598

Faculty of Engineering & Architectural Science: Xue-Li Robinson, ext 4927
(Aerospace, Architecture, Mechanical & Industrial)

Faculty of Engineering & Architectural Science: Mary Louise Lambert (Interim RASO), ext 4927 (Aerospace, Architecture, Mechanical & Industrial)

Faculty of Engineering & Architectural Science: Gabbie Galbraith, ext 3161 (Civil, Chemical, Electrical & Computer)

Faculty of Science: Stephanie Suckling, ext 4866

Client Services - Research Accounting:

Diane Winiarz ext 6556: Director, Client Services

Liz Ing ext 6434: Manager, Research Accounting

Nadia Ferrari ext 7844: Supervisor, Research Accounting

Juan Liu ext 6775: Principal Investigators (Surname A-D)

Michelle Choi ext 6997: Principal Investigators (Surname E-H)

Robert Mochocki ext 7079 : Principal Investigators (Surname I-L)

Zeynep Pakirel ext 7206 : Principal Investigators (Surname M-Q)

Ben Bao ext 3152 : Principal Investigators (Surname R-V)

Denise Ramharry ext 2587 : Principal Investigators (Surname W-Z)

Susie Temou ext 4610 : Research Accounts Administrator

OVPRI - RIS Technical Support:

Chris Lam ext 4679: Info Tech Administrator

Leo Tsang ext 3281: 2 Factor Authentication

Computer & Communication Services (CCS):

CCS Help-line (2 Factor Authentication), ext. 6806

or

Email: help@ryerson.ca

Introduction to RIS

The Research Information System (RIS) provides you with tools to retrieve financial information, and other related information from both Financial and eHR systems. This self-serve option enables you to run the report and then export the report data to Excel from within RIS.

Access to cost centres and data is determined by your eligibility to have access to confidential data. You might not have access to all cost centres if these have recently been added to your portfolio, please contact your Research Financial Analyst to update your security access.

We've provided an outline of topics here to help you with using Two-Factor authentication, logging in and running reports within RIS.

Activate your Two-Factor Authentication

About Two-Factor Authentication

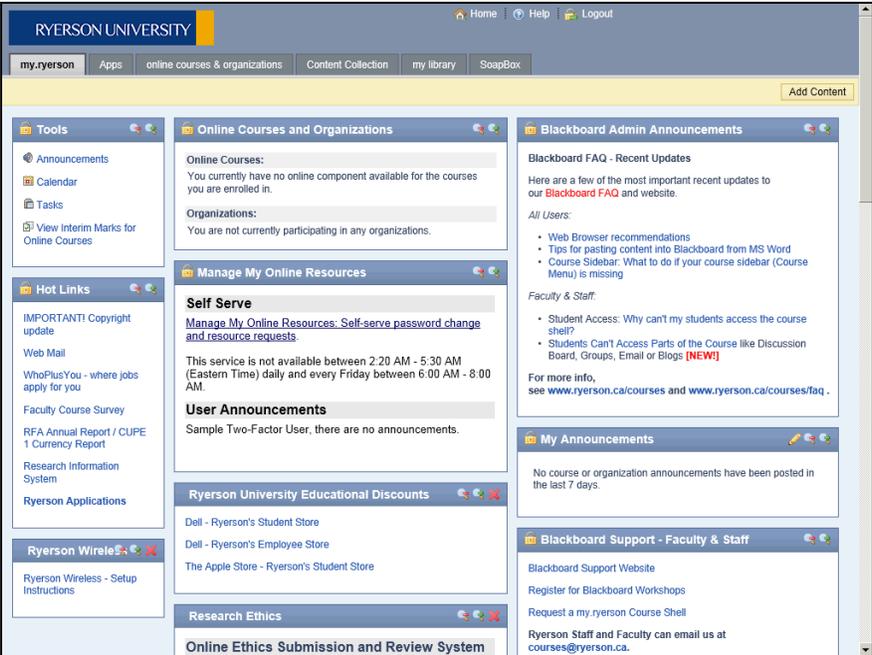
The two-factor authentication system provides an additional level of security when signing in to Ryerson web applications via Ryerson's Central Authentication Service.

With two-factor authentication enabled, each time you enter your username and password for a system there will be a prompt to enter a time sensitive one-time verification code. This one-time verification code is generated by an application on your mobile device (Ryerson Authenticator) or by using your fob (One-Time Verification Generator).

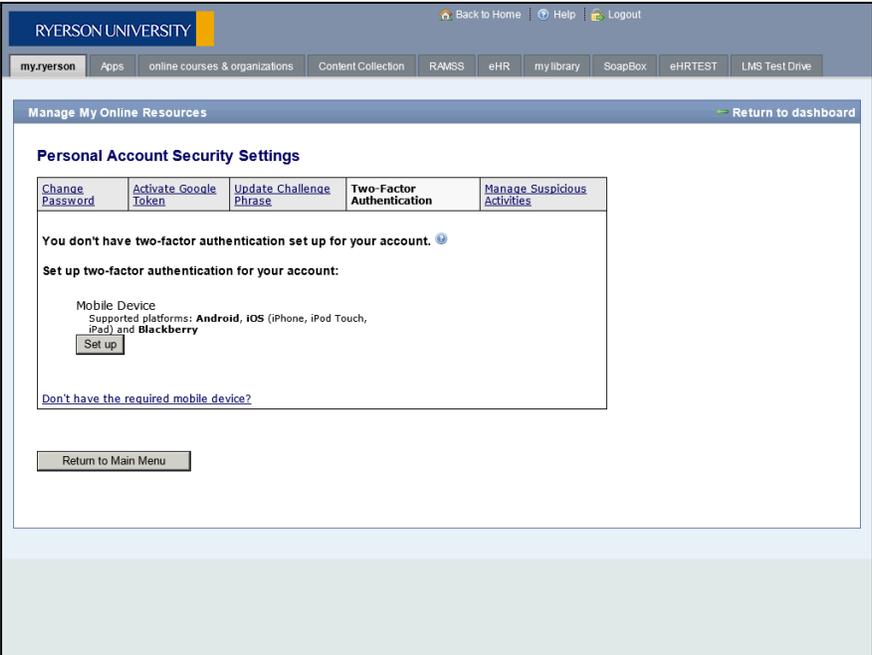
Procedure

In this topic you will learn how to set up two-factor authentication with or without a mobile device.

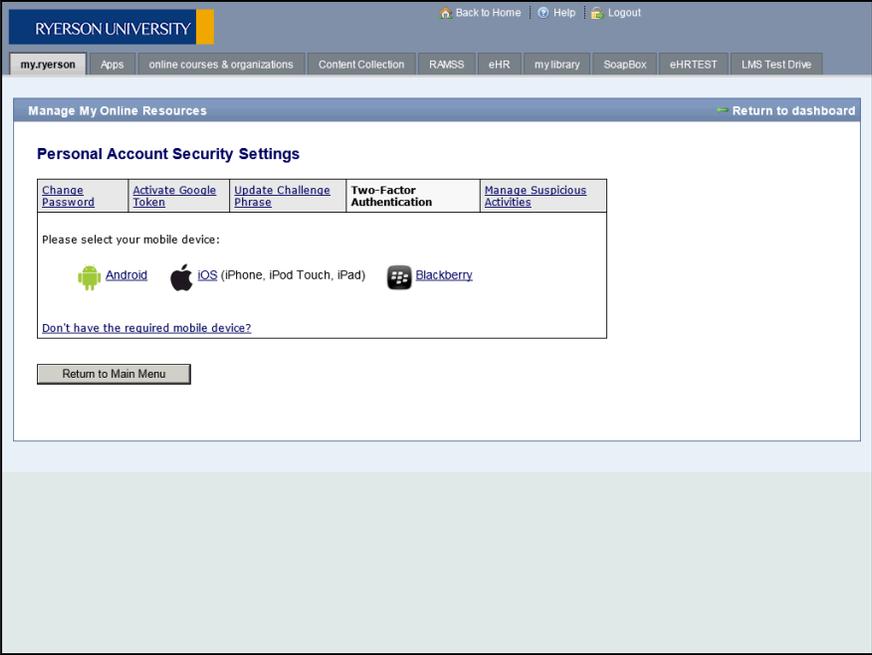
Step	Action
1.	Login to the CAS portal at my.ryerson.ca. For this example, enter " jane.doe "
2.	In the Password field, enter " 123456 ".
3.	Click the Login button. 



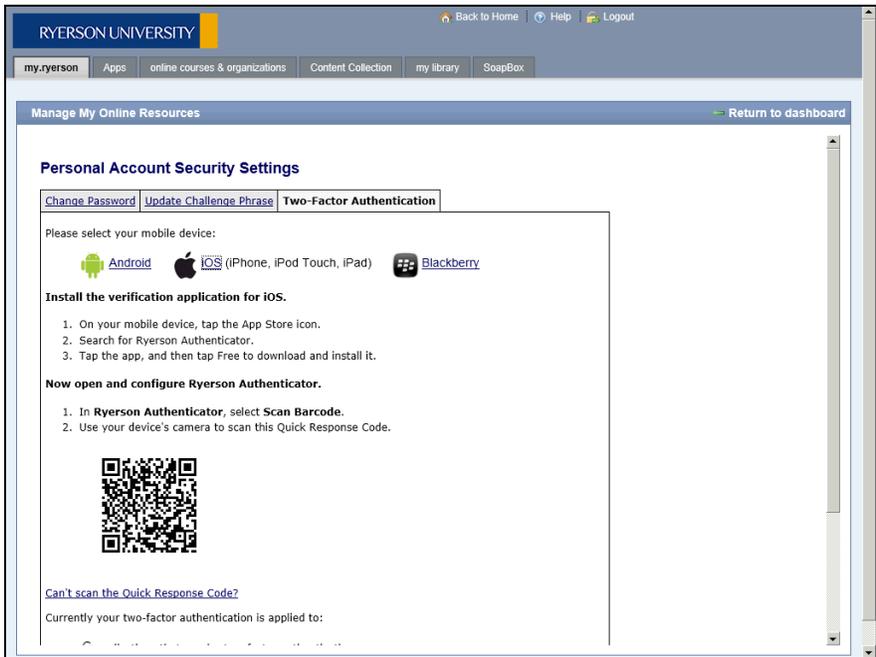
Step	Action
4.	<p>On the my.ryerson tab, locate the Manage My Online Resources section.</p> <p>Click the Manage My Online Resources: Self-serve password change and resource link.</p> <p>Manage My Online Resources: Self-serve password change and resource requests.</p>
5.	<p>The Self Serve screen allows you to manage your personal security, change your resources and opt-in or out of mailing lists.</p> <p>You will use this screen to set up this added layer of security to your mobile device.</p> <p>Click the Two-Factor Authentication link.</p> <p>Two-Factor Authentication</p>
6.	<p>Decision: Please make a selection from the options listed below.</p> <ul style="list-style-type: none"> • Set up a Mobile Device Go to step 7 • Set up without a Mobile Device Go to step 23



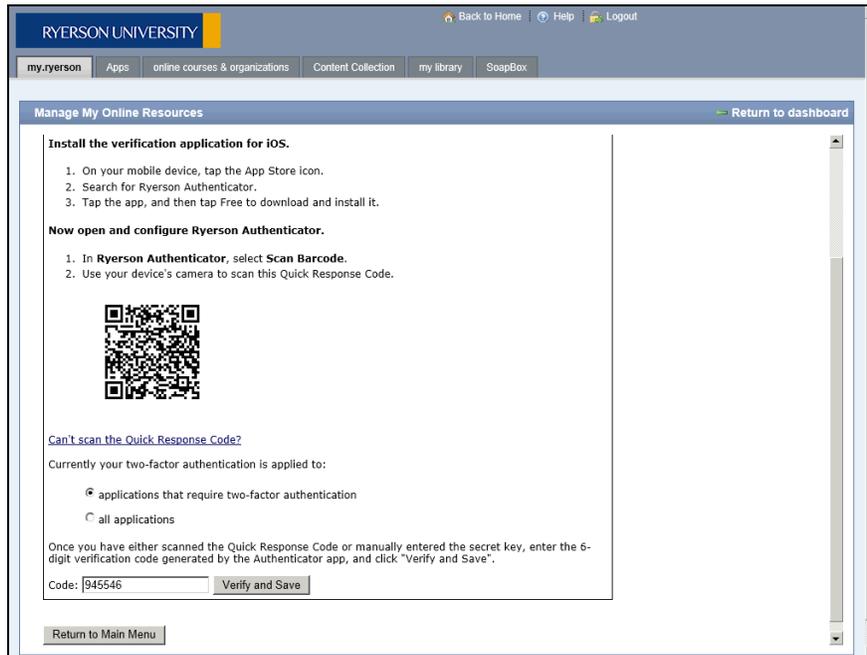
Step	Action
7.	<p>Two-factor authentication supports Android, iOS (iPhone, pod Touch, pad) and Blackberry.</p> <p>Click the Set up button.</p> 



Step	Action
8.	<p>Select your mobile device and follow the on-screen instructions.</p> <p>For illustration purposes, you will use the iOS (iPhone, iPod Touch, iPad) option.</p> <p>Click the iOS link.</p> <p>iOS</p>
9.	<p>There are four steps to completing your set-up:</p> <ol style="list-style-type: none"> 1. Install the Ryerson Authenticator app for iOS. 2. Scan the Quick Response Code (QRC). 3. Select the applications that will use two-factor authentication. 4. Verify and save.
10.	<p>After you have installed the app on your mobile device, scan the QRC displayed on the screen.</p> <p>If your device cannot scan the QRC for any reason, click the Can't scan the Quick Response Code link. The section provides instructions on how to generate a key and manually setting up your mobile device.</p> <p>When you scan the QRC or manually enter your key, the mobile application will generate a new 6-number code every 30 seconds.</p>

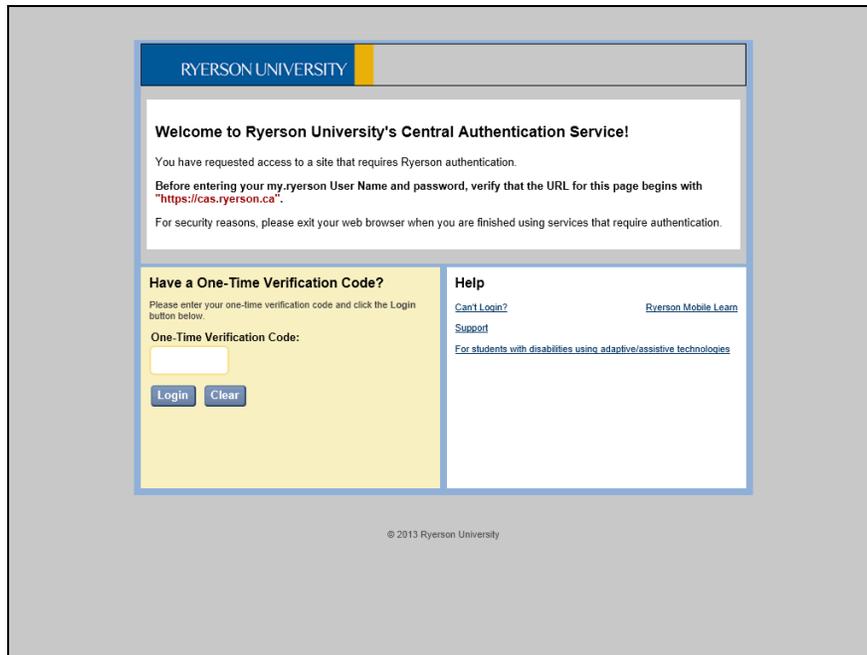


Step	Action
11.	Click the Scroll bar.



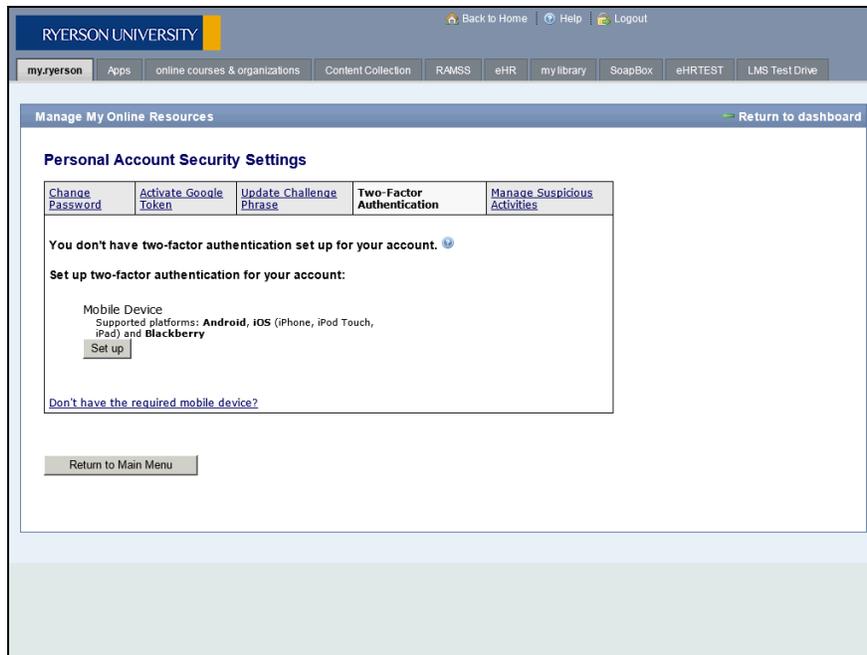
Step	Action
12.	<p>Select one of the options.</p> <p>In this example, click the applications that require two-factor authentication option.</p> <p>You can update this at any time.</p> <p><input checked="" type="radio"/></p>
13.	<p>Enter the 6-number code on your iPhone. In this example, enter "945546" into the Code field.</p>
14.	<p>Click the Verify and Save button.</p> <p>Note: Your device will display a timer icon to indicate how long the code will be active. Codes are valid for 30 seconds.</p> <p>Verify and Save</p>
15.	<p>The two-factor authentication confirmation page will display once a QRC is scanned or a key is entered correctly.</p>
16.	<p>You can generate backup codes in the event you are not able to access your mobile device for any reason. These are one-time use, randomly generated codes.</p> <p>Click the Show/Generate Backup Codes button.</p> <p>Show/Generate Backup Codes</p>

Step	Action
17.	Click the Back button. 
18.	You may want to revoke your device if you have either lost or replaced your mobile device or if you no longer wish to use two-factor authentication.



Step	Action
19.	Once you have set-up your two-factor authentication for either all applications or only those that require two factor authentication, you will be prompted to enter a one-time verification code. Open your Ryerson Authenticator app to view a valid code. In this example, enter " 123456 " into the One-Time Verification Code field. Your mobile device will display a timer icon to indicate how long the code will be active. Codes are valid for 30 seconds .
20.	Click the Login button. 
21.	You have successfully logged into a secure environment.

Step	Action
22.	<p>You have learned how to set up two-factor authentication with a mobile device.</p> <p>Need Help?</p> <p>Online The two-factor authentication user guide is available online in HTML (http://www.ryerson.ca/acs/usersguide/2-Factor/) format.</p> <p>CCS Faculty/Staff Help Desk 416-979-5000 ext. 6806 help@ryerson.ca</p> <p>End of Procedure. Remaining steps apply to other paths.</p>



Step	Action				
23.	<p>Click the Don't have the required mobile device? link.</p> <p>Personal Account Security Settings</p> <table border="1"> <tr> <td>Change Password</td> <td>Activate Google Token</td> <td>Update Challenge Phrase</td> <td>Two-Factor Authentication</td> </tr> </table> <p>You don't have two-factor authentication set up for your account. ⓘ</p> <p>Set up two-factor authentication for your account:</p> <p>Mobile Device Supported platforms: Android, iOS (iPhone, iPod Touch, iPad) and Blackberry</p> <p>Set up</p> <p>Don't have the required mobile device?</p>	Change Password	Activate Google Token	Update Challenge Phrase	Two-Factor Authentication
Change Password	Activate Google Token	Update Challenge Phrase	Two-Factor Authentication		
24.	<p>Follow the on-screen instructions to request a 'One-Time Verification' (OTV) Code Generator. This is a <i>foB</i> that will generate a unique OTV code each time you login.</p>				

Step	Action
25.	You have learned how to set up two-factor authentication without a mobile device. End of Procedure.

Login & RIS Basics

Once you have logged into my.ryerson using your username and password, another screen will be shown asking you to use your one-time verification code.

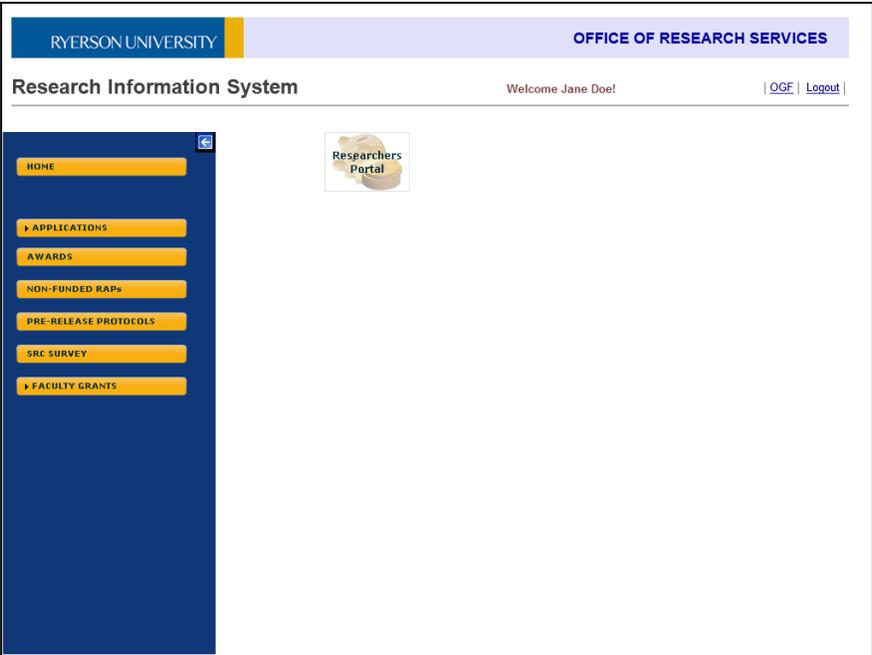
All one-time verification codes are time-sensitive and valid for 30 seconds. Use one of the following methods to enter your one-time verification code:

- Start the Ryerson Authenticator app and enter the verification code displayed on your mobile device each time you login. The screen will auto-refresh every 30 seconds and provide you with a new code.
- Your fob (One-Time Verification Generator) displays a 6-number code. The screen will auto-refresh every 30 seconds and provide you with a new code.

Procedure

In this topic you will learn how to login and navigate the RIS interface.

Step	Action
1.	<p>Once you have set-up your two-factor authentication for either all applications or only those that require two factor authentication, you will be prompted to enter a one-time verification code.</p> <p>Open your Ryerson Authenticator app or fob to view a valid code.</p> <p>In this example, enter "123456" into the One-Time Verification Code field.</p> <p>Your mobile device/fob will display a timer icon to indicate how long the code will be active. Codes are valid for 30 seconds.</p>
2.	<p>Click the Login button.</p> 
3.	<p>You have successfully logged into a secure environment.</p>



Step	Action
4.	To access RIS, click the Researchers Portal graphic. 
5.	Click the I acknowledge I have read and understood the contents of this note graphic. 

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Research Information System Welcome Jane Doe! | [OGF](#) | [Logout](#)

Researcher Portal - to generate a report, please select a Cost Center from the following table

PI Name	Cost Center	Application Num	Project Name	Sponsor Name	Contract Start	Contract End D	Awarded Amou
Doe, Jane	1-51-54442	101246	Developing Fac	Social Sciences	31 May 2008	30 May 2011	\$179,911.00
Doe, Jane	1-51-56868	110582	Media Discours	Social Sciences	01 Apr 2005	31 Mar 2008	\$91,425.00
Doe, Jane	1-51-53142	118321	DiversityLeads	Social Sciences	01 Mar 2011	29 Feb 2016	\$332,683.50
Doe, Jane	1-51-53038	121180	Partnership on	Toronto Police	27 Oct 2010	31 Aug 2012	\$151,050.00
Doe, Jane	1-51-53107	121784	Research to Inf	Canadian Touri	14 Mar 2011	31 Mar 2011	\$11,799.00
Doe, Jane	1-51-51354	122241	Media Discours	Ryerson Univer	25 Mar 2011	24 Mar 2013	\$24,110.00
Doe, Jane	1-51-51372	123040	DiversityLeads	Ryerson Univer	01 Mar 2011	29 Feb 2016	\$194,375.00
Doe, Jane	1-51-53219	123060	Analysis of TV r	Canadian Broa	22 Mar 2011	15 Nov 2011	\$41,340.00
Doe, Jane	1-51-53268	123680	Grants Manage	NCE; MITACS -	01 Jul 2011	31 Dec 2011	\$7,000.00
Doe, Jane	1-51-53269	124481	Grants Manage	NCE; MITACS -	01 Jul 2011	31 Mar 2012	\$8,000.00
Doe, Jane	1-51-51385	125201	Diversity Instit.	Ryerson Univer	19 Sep 2011	30 Sep 2012	\$72,999.28
Doe, Jane	1-51-53313	125360	Analyzing gap	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$15,000.00
Doe, Jane	1-51-53311	126380	Diversity Snaps	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$7,500.00
Doe, Jane	1-51-53473	126523	Promoting dive	Social Sciences	01 Mar 2012	28 Feb 2013	\$48,850.00
Doe, Jane	1-51-53312	126722	Diversity Snaps	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$7,500.00
Doe, Jane	1-51-53409	127128	Investing in ou	Mitacs Inc.	15 Feb 2012	15 Aug 2012	\$15,000.00
Doe, Jane	1-51-53374	127205	Assessing impa	Social Sciences	10 Feb 2012	01 Mar 2013	\$24,186.00
Doe, Jane	1-51-51415	127791	2012 Undergra	Ryerson Univer	27 Apr 2012	30 Sep 2012	\$380,000.00
Doe, Jane	1-51-53504	127822	Fed Dev ARC E	Federal Econo	12 Dec 2011	31 Mar 2013	\$75,000.00
Doe, Jane	1-51-53531	127935	REB agreement	Wellesley Inst	01 Jan 2010	31 Dec 2012	\$10,000.00
Doe, Jane	1-51-51418	127936	Design and dev	Ryerson Univer	01 May 2012	30 Apr 2014	\$13,419.69

SEARCH - Cost Center: Project: Sponsor:

Step	Action
6.	<p>Being familiar with the interface will make it easier for you to find information, sort data and resize columns.</p> <p>Click the Hide Menu button to create more screen space.</p>
7.	<p>Information about each principal investigator and associated projects is displayed in a table.</p> <p>Hover your cursor over the text under the Project Name or Sponsor Name column to view a full description.</p>
8.	<p>Position the pointer and drag the column left or right to display a full description.</p>
9.	<p>If you manage multiple projects, you can enter the cost centre, project name etc. in the search fields to filter the data you want to display.</p>

Step	Action																																																																																																								
10.	<p>Click the Cost Center number link to access data for a specific project.</p> <div data-bbox="358 317 1068 541" style="border: 1px solid #ccc; padding: 5px;"> <p>Researcher Portal - to generate a report, please select a Cost Center from the following table</p> <table border="1"> <thead> <tr> <th>PI Name</th> <th>Cost Center</th> <th>Application Number</th> <th>Project Name</th> <th>Sponsor Name</th> <th>Contract Start Date</th> <th>Contract End Date</th> <th>Awarded Amount</th> </tr> </thead> <tbody> <tr> <td>Doe, Jane</td> <td>1-51-54442</td> <td>101246</td> <td>Social Intervention Res</td> <td>Social Sciences and</td> <td>31 May 2008</td> <td>30 May 2011</td> <td>\$179,911.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-56868</td> <td>110582</td> <td>Radio Broadcast Rese</td> <td>Social Sciences and</td> <td>01 Apr 2005</td> <td>31 Mar 2008</td> <td>\$91,425.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53142</td> <td>118321</td> <td>Urban Traveller Resea</td> <td>Social Sciences and</td> <td>01 Mar 2011</td> <td>29 Feb 2016</td> <td>\$332,683.50</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53038</td> <td>121180</td> <td>Internal Design Resea</td> <td>Toronto Police Serv</td> <td>27 Oct 2010</td> <td>31 Aug 2012</td> <td>\$151,050.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53107</td> <td>121784</td> <td>External Design Resea</td> <td>Canadian Tourism</td> <td>14 Mar 2011</td> <td>31 Mar 2011</td> <td>\$11,799.00</td> </tr> <tr style="border: 2px solid red;"> <td>Doe, Jane</td> <td>1-51-51354</td> <td>122241</td> <td>Ryerson University</td> <td>Ryerson University</td> <td>25 Mar 2011</td> <td>24 Mar 2013</td> <td>\$24,110.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-51372</td> <td>123040</td> <td>Visual Design Researc</td> <td>Ryerson University</td> <td>01 Mar 2011</td> <td>29 Feb 2016</td> <td>\$194,075.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53219</td> <td>123060</td> <td>Multi Design Research</td> <td>Canadian Broadcast</td> <td>22 Mar 2011</td> <td>15 Nov 2011</td> <td>\$41,340.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53268</td> <td>123680</td> <td>Visual Design Researc</td> <td>NCE: MITACS - The</td> <td>01 Jul 2011</td> <td>31 Dec 2011</td> <td>\$7,000.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53269</td> <td>124481</td> <td>Visual Design Researc</td> <td>NCE: MITACS - The</td> <td>01 Jul 2011</td> <td>31 Mar 2012</td> <td>\$8,000.00</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-51385</td> <td>125201</td> <td>Visual Design Researc</td> <td>Ryerson University</td> <td>19 Sep 2011</td> <td>30 Sep 2012</td> <td>\$72,999.28</td> </tr> <tr> <td>Doe, Jane</td> <td>1-51-53313</td> <td>125360</td> <td>Visual Design Researc</td> <td>Mitacs Inc.</td> <td>15 Nov 2011</td> <td>31 Mar 2012</td> <td>\$15,000.00</td> </tr> </tbody> </table> </div>	PI Name	Cost Center	Application Number	Project Name	Sponsor Name	Contract Start Date	Contract End Date	Awarded Amount	Doe, Jane	1-51-54442	101246	Social Intervention Res	Social Sciences and	31 May 2008	30 May 2011	\$179,911.00	Doe, Jane	1-51-56868	110582	Radio Broadcast Rese	Social Sciences and	01 Apr 2005	31 Mar 2008	\$91,425.00	Doe, Jane	1-51-53142	118321	Urban Traveller Resea	Social Sciences and	01 Mar 2011	29 Feb 2016	\$332,683.50	Doe, Jane	1-51-53038	121180	Internal Design Resea	Toronto Police Serv	27 Oct 2010	31 Aug 2012	\$151,050.00	Doe, Jane	1-51-53107	121784	External Design Resea	Canadian Tourism	14 Mar 2011	31 Mar 2011	\$11,799.00	Doe, Jane	1-51-51354	122241	Ryerson University	Ryerson University	25 Mar 2011	24 Mar 2013	\$24,110.00	Doe, Jane	1-51-51372	123040	Visual Design Researc	Ryerson University	01 Mar 2011	29 Feb 2016	\$194,075.00	Doe, Jane	1-51-53219	123060	Multi Design Research	Canadian Broadcast	22 Mar 2011	15 Nov 2011	\$41,340.00	Doe, Jane	1-51-53268	123680	Visual Design Researc	NCE: MITACS - The	01 Jul 2011	31 Dec 2011	\$7,000.00	Doe, Jane	1-51-53269	124481	Visual Design Researc	NCE: MITACS - The	01 Jul 2011	31 Mar 2012	\$8,000.00	Doe, Jane	1-51-51385	125201	Visual Design Researc	Ryerson University	19 Sep 2011	30 Sep 2012	\$72,999.28	Doe, Jane	1-51-53313	125360	Visual Design Researc	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$15,000.00
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11.	<p>Each cost center has five reports associated with it. Hover your cursor over the report name to view a full description.</p> <p>Refer to the Run Reports topic in this module for more information about each report.</p>																																																																																																								
12.	<p>End of simulation. End of Procedure.</p>																																																																																																								

Print Reports

The report examples included in this section will help you gain a basic understanding of how to:

- run reports for a month or range of dates
- export data to Excel
- interpret financial reports to understand how to manage budgets and expenses for your research initiatives

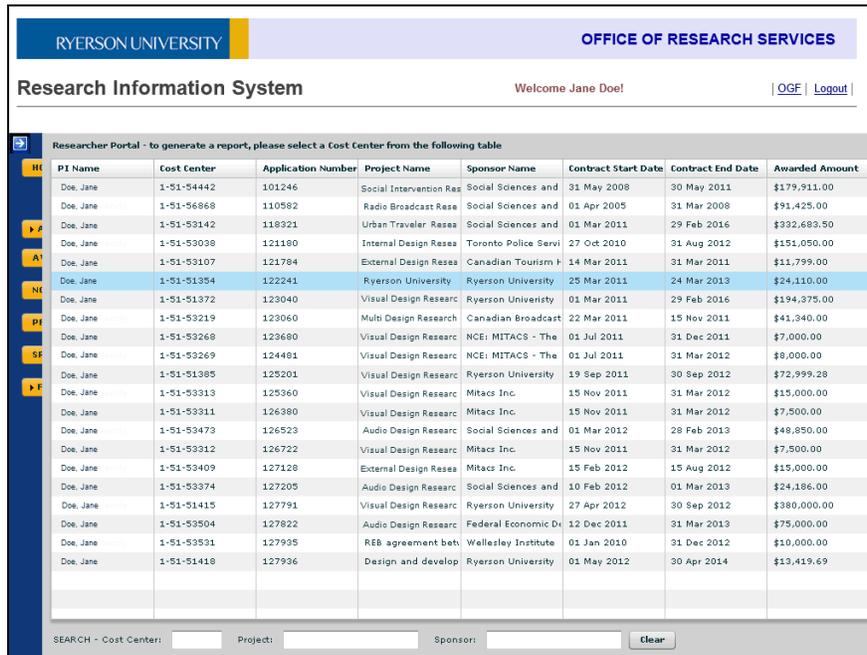
If you require further assistance understanding the data, please contact your Research Financial Analyst.

Project To-Date Expense Summary

The **Project To-Date Expense Summary** (PJTD) report is a cumulative financial report from project inception to end of month selected. Includes information about budgets, actuals, commitments and funds available. The report also includes a summary of expenses for the selected month.

Procedure

In this topic you will run the PJTD report and export data to Excel.



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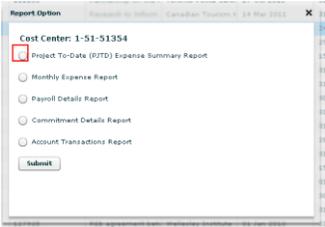
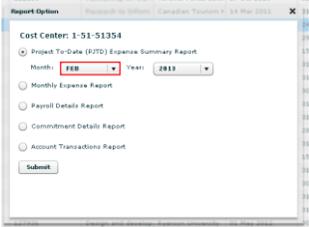
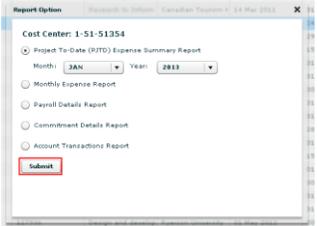
Research Information System Welcome Jane Doe! [OGF](#) [Logout](#)

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Doe, Jane	1-51-53268	123680	Visual Design Researc	NCE: MITACS - The	01 Jul 2011	31 Dec 2011	\$7,000.00
Doe, Jane	1-51-53269	124481	Visual Design Researc	NCE: MITACS - The	01 Jul 2011	31 Mar 2012	\$8,000.00
Doe, Jane	1-51-51385	125201	Visual Design Researc	Ryerson University	19 Sep 2011	30 Sep 2012	\$72,999.28
Doe, Jane	1-51-53313	125360	Visual Design Researc	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$15,000.00
Doe, Jane	1-51-53313	126380	Visual Design Researc	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$7,500.00
Doe, Jane	1-51-53473	126523	Audio Design Researc	Social Sciences and	01 Mar 2012	28 Feb 2013	\$48,850.00
Doe, Jane	1-51-53312	126722	Visual Design Researc	Mitacs Inc.	15 Nov 2011	31 Mar 2012	\$7,500.00
Doe, Jane	1-51-53409	127128	External Design Resea	Mitacs Inc.	15 Feb 2012	15 Aug 2012	\$15,000.00
Doe, Jane	1-51-53374	127205	Audio Design Researc	Social Sciences and	10 Feb 2012	01 Mar 2013	\$24,186.00
Doe, Jane	1-51-51415	127791	Visual Design Researc	Ryerson University	27 Oct 2012	30 Sep 2012	\$980,000.00
Doe, Jane	1-51-53504	127822	Audio Design Researc	Federal Economic Dv	12 Dec 2011	31 Mar 2013	\$75,000.00
Doe, Jane	1-51-53531	127935	REB agreement betw	Wellesley Institute	01 Jan 2010	31 Dec 2012	\$10,000.00
Doe, Jane	1-51-51418	127936	Design and develop	Ryerson University	01 May 2012	30 Apr 2014	\$13,419.69

SEARCH - Cost Center: Project: Sponsor:

Step	Action
1.	<p>Once you have accessed the RIS portal, navigate to the cost center/project name.</p> <p>Click the Cost Center name link to access reports for a specific project.</p> 

Step	Action
2.	<p>Click the Project To Date option.</p> 
3.	<p>Determine the reporting period by choosing the month and year from the dropdown lists.</p> <p>Click the Month dropdown button to activate the menu.</p> 
4.	<p>Click the JAN list item.</p> 
5.	<p>Click the Submit button.</p> <p>The report will generate and display on the screen.</p> 
6.	<p>The PJTD report provide details about expense categories associated with each project name.</p>

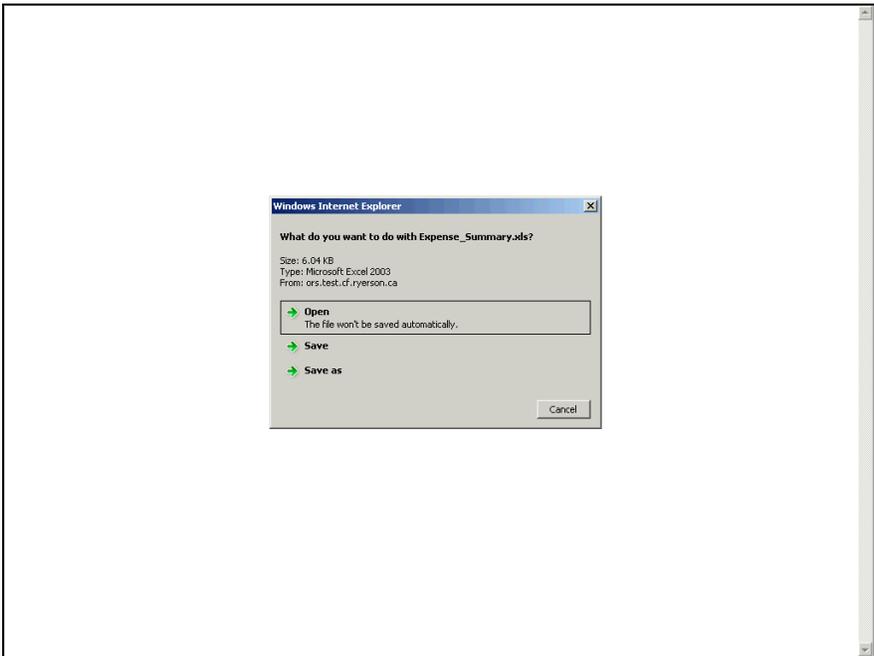


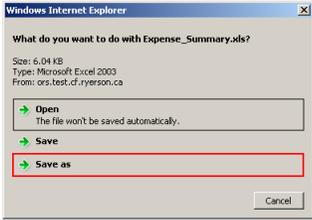
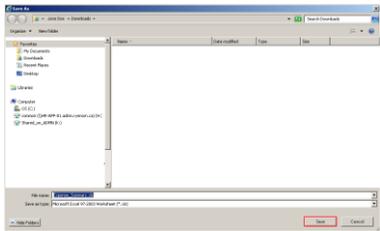
Financial Services Department
 Human Resources Department
 VP Research & Innovation

Project-to-Date (PJTD) Expense Summary Report - as at end of JAN-2013
 Cost Center: 51354 - Inventive Discourses of an Architectural Design Landscape
 PI: Doe, Jane

Account Code	Account Description	Budget	Committed as of JAN-13	Expenses as of JAN-13	Net as of JAN-13	JAN-13 Expenses
Salary						
6000	Salary Pool	15,104.00	0.00	0.00		0.00
6128	R.A. - Masters		0.00	7,757.22		0.00
6919	Employers Health Tax		0.00	151.27		0.00
6925	CPP		0.00	357.33		0.00
6932	Employment Insurance		0.00	198.75		0.00
6933	Workers Compensation		0.00	27.93		0.00
	Subtotal	15,104.00	0.00	8,492.50	6,611.50	0.00
Travel						
7731	Travel Expense		0.00	2,695.54		0.00
	Subtotal	0.00	0.00	2,695.54	(2,695.54)	0.00
Materials, Supplies & Other Expenses						

Step	Action
7.	To view the data in Excel, click the Export to Excel file button. <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Export to Excel file"/> </div>



Step	Action
8.	<p>Your browser might prompt you with different options.</p> <p>Click the Save as button.</p> 
9.	<p>If you wish, rename the report to something meaningful.</p> <p>Click the Save button.</p> 



Financial Services Department
Human Resources Department
VP Research & Innovation

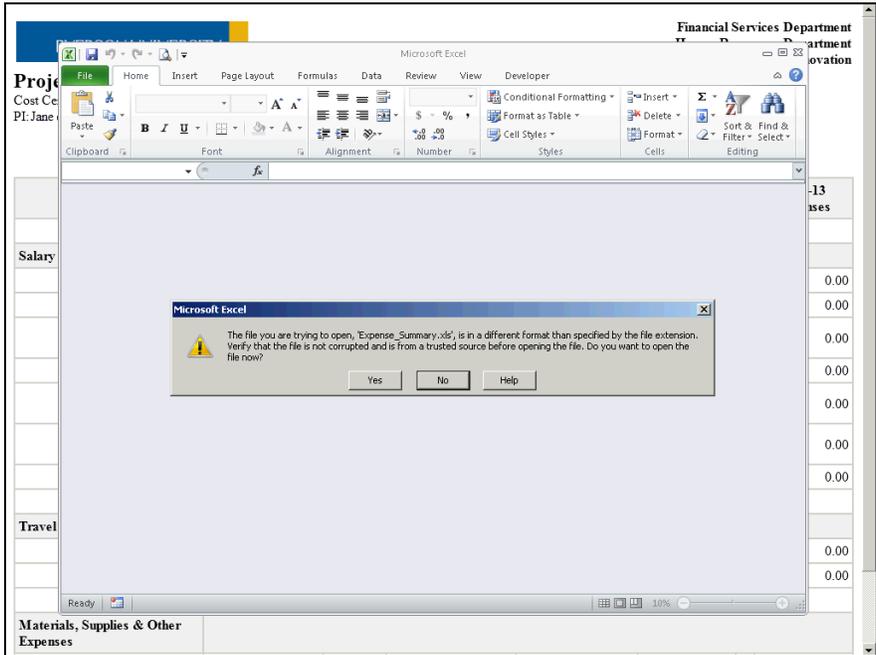
Project-to-Date (PJTD) Expense Summary Report - as at end of JAN-2013

Cost Center: 51354 - Inventive Discourses of an Architectural Design Landscape
PI: Doe, Jane

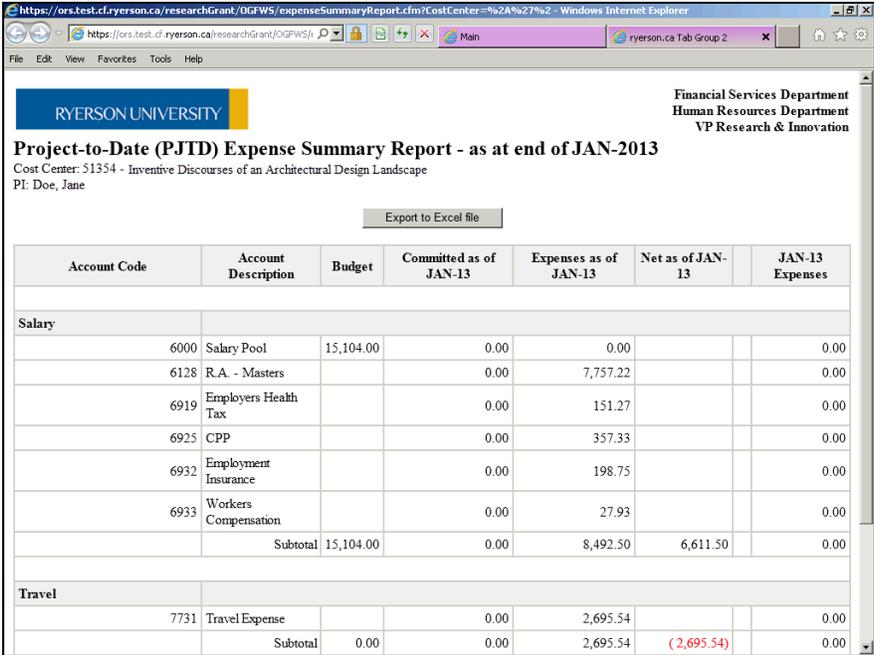
Account Code	Account Description	Budget	Committed as of JAN-13	Expenses as of JAN-13	Net as of JAN-13	JAN-13 Expenses
Salary						
6000	Salary Pool	15,104.00	0.00	0.00		0.00
6128	R.A. - Masters		0.00	7,757.22		0.00
6919	Employers Health Tax		0.00	151.27		0.00
6925	CPP		0.00	357.33		0.00
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	Subtotal	15,104.00	0.00	8,492.50	6,611.50	0.00
Travel						
7731	Travel Expense		0.00	2,695.54		0.00
	Subtotal	0.00	0.00	2,695.54	(2,695.54)	0.00
Materials, S Expenses						

The Expense_Summary.xls download has completed.

Step	Action
10.	<p>Click the Open button.</p> 



Step	Action
11.	Click the Yes button. 
12.	Note: You might not have access to all account codes/cost centres if these have recently been added to your portfolio.



Financial Services Department
Human Resources Department
VP Research & Innovation

Project-to-Date (PJTD) Expense Summary Report - as at end of JAN-2013
 Cost Center: 51354 - Inventive Discourses of an Architectural Design Landscape
 PI: Doe, Jane

[Export to Excel file](#)

Account Code	Account Description	Budget	Committed as of JAN-13	Expenses as of JAN-13	Net as of JAN-13	JAN-13 Expenses
Salary						
6000	Salary Pool	15,104.00	0.00	0.00		0.00
6128	R.A. - Masters		0.00	7,757.22		0.00
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	Subtotal	15,104.00	0.00	8,492.50	6,611.50	0.00
Travel						
7731	Travel Expense		0.00	2,695.54		0.00
	Subtotal	0.00	0.00	2,695.54	(2,695.54)	0.00

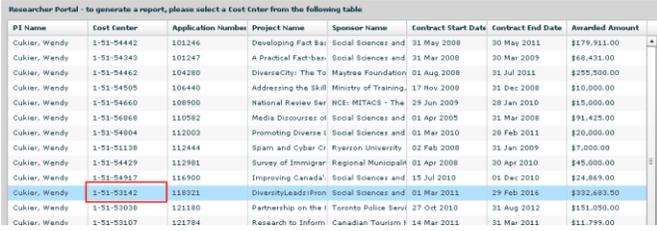
Step	Action
13.	Click the Close Tab (Ctrl+W) button. 
14.	End of simulation. End of Procedure.

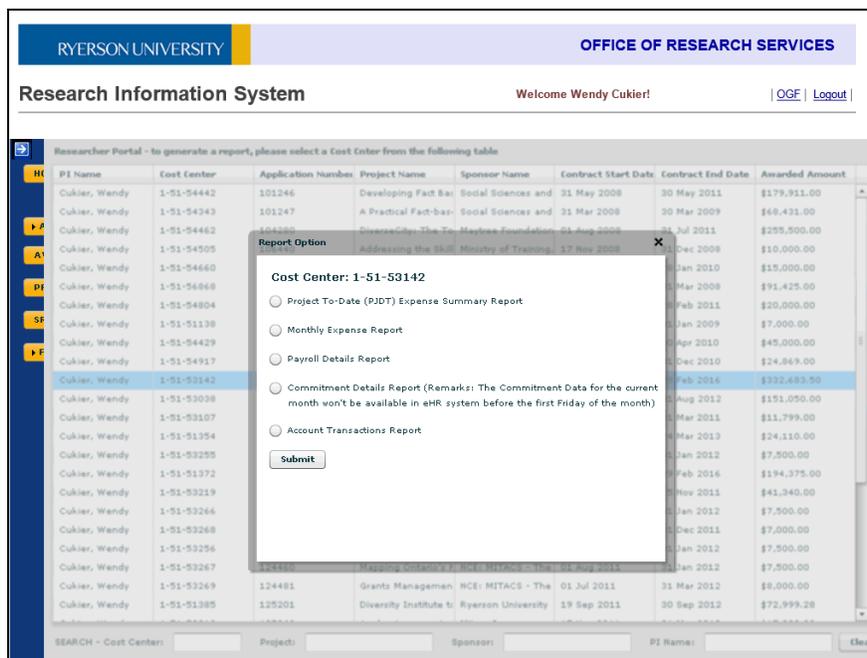
Monthly Expense Report

The **Monthly Expense** report provides details on all expenditures for the month and year selected.

Procedure

In this topic you will run the monthly expense report and export data to Excel.

Step	Action
1.	<p>Once you have accessed the RIS portal, navigate to the cost center/project name.</p> <p>Click the Cost Center link to access reports for a specific project.</p> 

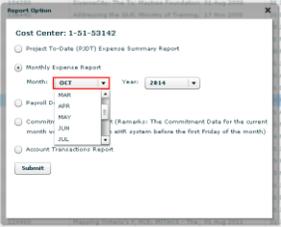
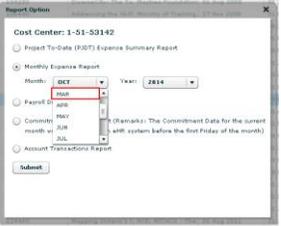
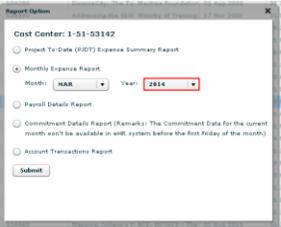
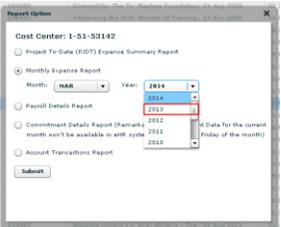


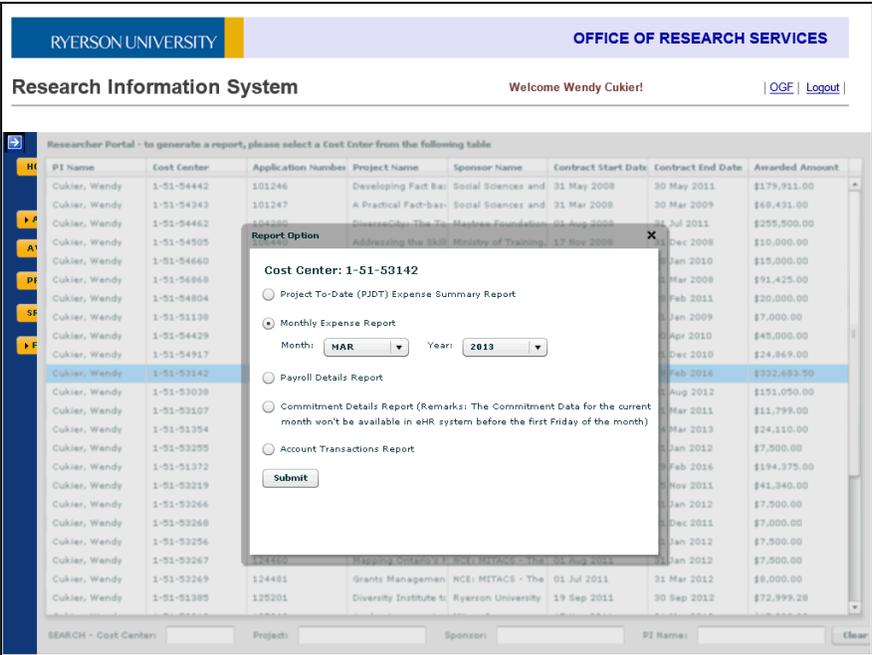
Report Option

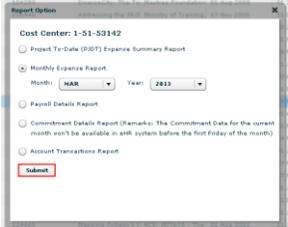
Cost Center: 1-51-53142

- Project To-Date (PJDT) Expense Summary Report
- Monthly Expense Report
- Payroll Details Report
- Commitment Details Report (Remarks: The Commitment Data for the current month won't be available in eHR system before the first Friday of the month)
- Account Transactions Report

Submit

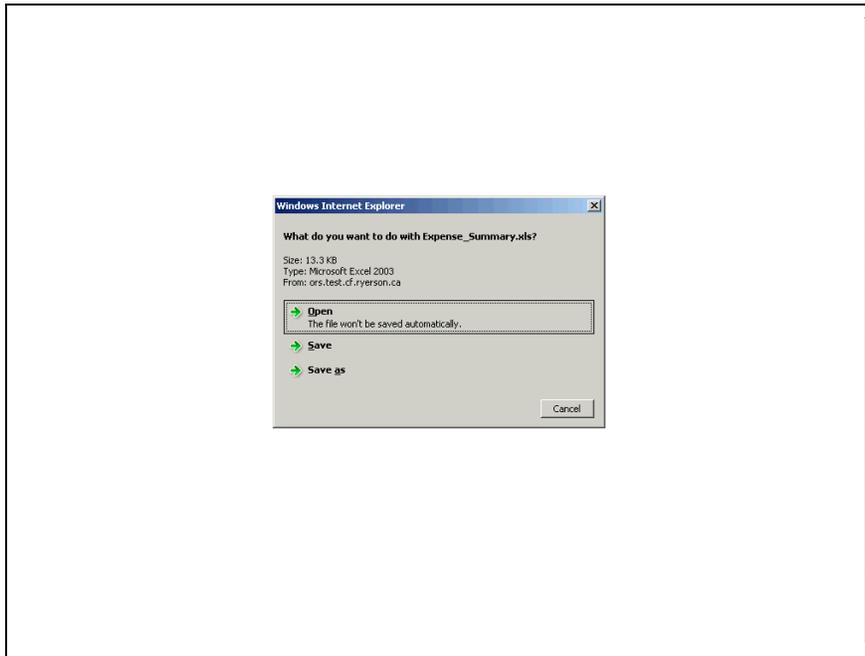
Step	Action
2.	<p>Click the Monthly Expense Report option.</p> 
3.	<p>Determine the reporting period by choosing the month and year from the dropdown lists (does not allow a range, restricted to only one month).</p> <p>Click the Month dropdown button to activate the menu.</p> 
4.	<p>Click the MAR list item.</p> 
5.	<p>Click the Year dropdown button to activate the menu.</p> 
6.	<p>Click the 2013 list item.</p> 

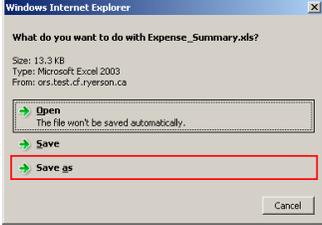


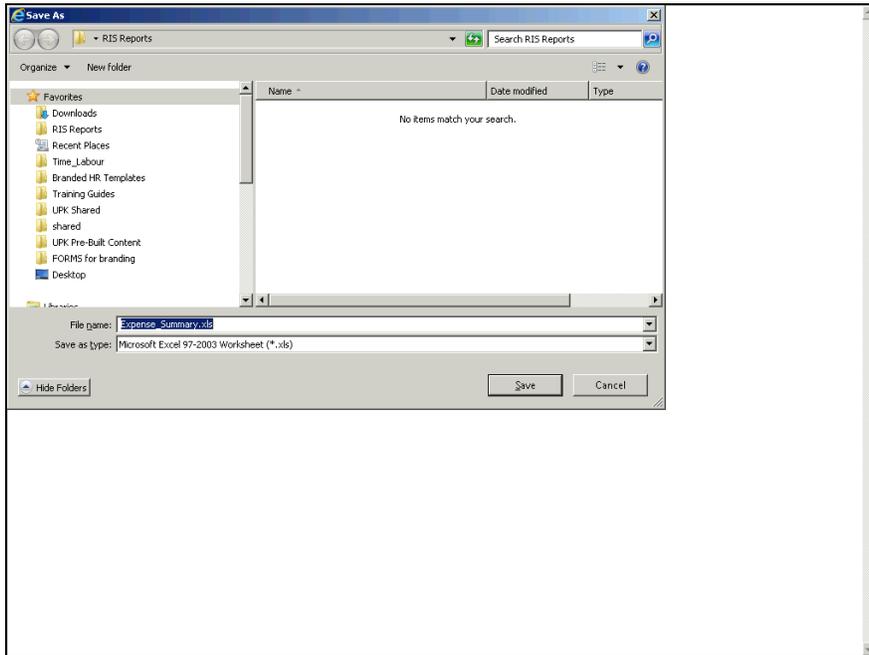
Step	Action
7.	Click the Submit button. 
8.	The monthly expense report provides details about expenditure categories for the month and year selected.

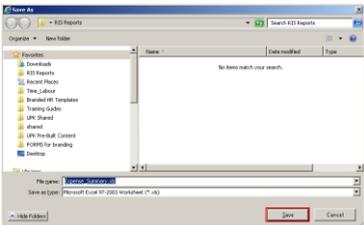
Posted Date	Account	Account Description	Vendor	Invoice	Description	Amount
<div style="display: flex; justify-content: space-between; align-items: center;"> RYERSON UNIVERSITY Financial Services Department Human Resources Department VP Research & Innovation </div> <p>PI Report - Monthly Expense Detail - MAR-2013 Cost Center: 53142 - DiversityLeads:Promoting diversity in leadership - PI: Cukier, Wendy</p> <p style="text-align: center;">Export to Excel file</p>						
Source: Adjustments						
02-Apr-2013	7210	Chbk-Phone Monthly			10191-Feb/13-PremierGlobalConference-P.Brindham	66.07
Total Adjustments						66.07
Source: CashReceipts						
27-Mar-2013	7042	Petty Cash Expense			CashReceipts	16.00
Total CashReceipts						16.00
Source: Payables						
22-Mar-2013	7160	Printing:External	Bank Of Montreal	20MAR2013-09-57	ALICOS DIGITAL PRINT C-1-11-11016	1,457.00
22-Mar-2013	7160	Printing:External	Bank Of Montreal	20MAR2013-09-57	ALICOS DIGITAL PRINT C-1-11-11016	49.68
22-Mar-2013	7731	Travel Expense	Roach, Erin	CQ150581	Reimb/travel	133.34
Total Payables						1,640.02

Step	Action
9.	To view the data in Excel, click the Export to Excel file button. <div style="text-align: center; border: 1px solid black; padding: 5px; margin: 5px auto; width: fit-content;"> Export to Excel file </div>



Step	Action
10.	<p>Your browser might prompt you with different options. Click the Save as button.</p> 



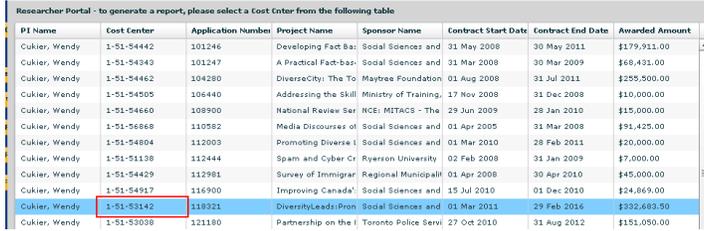
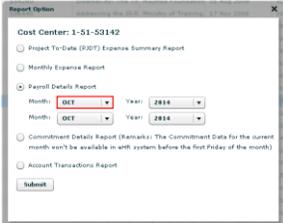
Step	Action
11.	<p>If you wish, rename the report to something meaningful and save the report. Click the Save button.</p> 
12.	<p>End of simulation. End of Procedure.</p>

Payroll Details Report

The **Payroll Details** report provides details of salary and benefits expenses for months selected.

Procedure

In this topic you will run the payroll details report and export data to Excel.

Step	Action																																																																																																								
1.	<p>Once you have accessed the RIS portal, navigate to the cost center/project name.</p> <p>Click the Cost Center link to access reports for a specific project.</p>  <table border="1"> <caption>Researcher Portal - to generate a report, please select a Cost Center from the following table</caption> <thead> <tr> <th>PI Name</th> <th>Cost Center</th> <th>Application Number</th> <th>Project Name</th> <th>Sponsor Name</th> <th>Contract Start Date</th> <th>Contract End Date</th> <th>Awarded Amount</th> </tr> </thead> <tbody> <tr> <td>Cukier, Wendy</td> <td>1-51-54442</td> <td>101246</td> <td>Developing Fact Ba</td> <td>Social Sciences and</td> <td>31 May 2008</td> <td>30 May 2011</td> <td>\$179,931.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54343</td> <td>101247</td> <td>A Practical Fact-ba</td> <td>Social Sciences and</td> <td>31 Mar 2008</td> <td>30 Mar 2009</td> <td>\$66,431.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54462</td> <td>104280</td> <td>DiverseCity: The To</td> <td>Maytree Foundation</td> <td>01 Aug 2008</td> <td>31 Jul 2011</td> <td>\$255,500.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54505</td> <td>106440</td> <td>Addressing the Skill</td> <td>Ministry of Training,</td> <td>17 Nov 2008</td> <td>31 Dec 2008</td> <td>\$10,000.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54660</td> <td>108900</td> <td>National Review Ser</td> <td>NCEI/ MTCACS - The</td> <td>29 Jun 2009</td> <td>28 Jan 2010</td> <td>\$15,000.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-56868</td> <td>110582</td> <td>Media Discourses of</td> <td>Social Sciences and</td> <td>01 Apr 2005</td> <td>31 Mar 2008</td> <td>\$91,425.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54804</td> <td>112003</td> <td>Promoting Diverse I</td> <td>Social Sciences and</td> <td>01 Mar 2010</td> <td>28 Feb 2011</td> <td>\$20,000.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-51138</td> <td>112444</td> <td>Spam and Cyber Cr</td> <td>Ryerson University</td> <td>02 Feb 2008</td> <td>31 Jan 2009</td> <td>\$7,000.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54429</td> <td>112981</td> <td>Survey of Immigrat</td> <td>Regional Municipali</td> <td>01 Apr 2008</td> <td>30 Apr 2010</td> <td>\$45,000.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-54917</td> <td>116900</td> <td>Improving Canada'</td> <td>Social Sciences and</td> <td>15 Jul 2010</td> <td>01 Dec 2010</td> <td>\$24,869.00</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-53142</td> <td>119321</td> <td>DiversityLeads:Prom</td> <td>Social Sciences and</td> <td>01 Mar 2011</td> <td>29 Feb 2016</td> <td>\$352,683.50</td> </tr> <tr> <td>Cukier, Wendy</td> <td>1-51-53038</td> <td>121180</td> <td>Partnership on the I</td> <td>Toronto Police Servi</td> <td>27 Oct 2010</td> <td>31 Aug 2012</td> <td>\$151,050.00</td> </tr> </tbody> </table>	PI Name	Cost Center	Application Number	Project Name	Sponsor Name	Contract Start Date	Contract End Date	Awarded Amount	Cukier, Wendy	1-51-54442	101246	Developing Fact Ba	Social Sciences and	31 May 2008	30 May 2011	\$179,931.00	Cukier, Wendy	1-51-54343	101247	A Practical Fact-ba	Social Sciences and	31 Mar 2008	30 Mar 2009	\$66,431.00	Cukier, Wendy	1-51-54462	104280	DiverseCity: The To	Maytree Foundation	01 Aug 2008	31 Jul 2011	\$255,500.00	Cukier, Wendy	1-51-54505	106440	Addressing the Skill	Ministry of Training,	17 Nov 2008	31 Dec 2008	\$10,000.00	Cukier, Wendy	1-51-54660	108900	National Review Ser	NCEI/ MTCACS - The	29 Jun 2009	28 Jan 2010	\$15,000.00	Cukier, Wendy	1-51-56868	110582	Media Discourses of	Social Sciences and	01 Apr 2005	31 Mar 2008	\$91,425.00	Cukier, Wendy	1-51-54804	112003	Promoting Diverse I	Social Sciences and	01 Mar 2010	28 Feb 2011	\$20,000.00	Cukier, Wendy	1-51-51138	112444	Spam and Cyber Cr	Ryerson University	02 Feb 2008	31 Jan 2009	\$7,000.00	Cukier, Wendy	1-51-54429	112981	Survey of Immigrat	Regional Municipali	01 Apr 2008	30 Apr 2010	\$45,000.00	Cukier, Wendy	1-51-54917	116900	Improving Canada'	Social Sciences and	15 Jul 2010	01 Dec 2010	\$24,869.00	Cukier, Wendy	1-51-53142	119321	DiversityLeads:Prom	Social Sciences and	01 Mar 2011	29 Feb 2016	\$352,683.50	Cukier, Wendy	1-51-53038	121180	Partnership on the I	Toronto Police Servi	27 Oct 2010	31 Aug 2012	\$151,050.00
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RYERSON UNIVERSITY OFFICE OF RESEARCH SERVICES

Research Information System Welcome Wendy Cukier! [OGF](#) [Logout](#)

Researcher Portal - to generate a report, please select a Cost Center from the following table

PI Name	Cost Center	Application Number	Project Name	Sponsor Name	Contract Start Date	Contract End Date	Awarded Amount
Cukier, Wendy	1-51-54442	101246	Developing Fact Ba	Social Sciences and	31 May 2008	30 May 2011	\$179,911.00
Cukier, Wendy	1-51-54343	101247	A Practical Fact-bar	Social Sciences and	31 Mar 2008	30 Mar 2009	\$66,431.00
Cukier, Wendy	1-51-54462	804288	DiverseCher The To	Maybee Foundation	01 Aug 2008	31 Jul 2011	\$255,500.00
Cukier, Wendy	1-51-54505		Addressing the GAC	Minister of Training	17 Nov 2008		\$10,000.00
Cukier, Wendy	1-51-54660					Jan 2010	\$15,000.00
Cukier, Wendy	1-51-56868					Mar 2008	\$91,425.00
Cukier, Wendy	1-51-54804					Feb 2011	\$20,000.00
Cukier, Wendy	1-51-51138					Jan 2009	\$7,000.00
Cukier, Wendy	1-51-54429					Apr 2010	\$45,000.00
Cukier, Wendy	1-51-54917					Dec 2010	\$24,869.00
Cukier, Wendy	1-51-53142					Feb 2016	\$332,483.50
Cukier, Wendy	1-51-53038					Aug 2012	\$151,050.00
Cukier, Wendy	1-51-53107					Mar 2011	\$11,799.00
Cukier, Wendy	1-51-51354					Mar 2013	\$24,110.00
Cukier, Wendy	1-51-53205					Jan 2012	\$7,500.00
Cukier, Wendy	1-51-51372					Feb 2016	\$194,375.00
Cukier, Wendy	1-51-53219					Nov 2011	\$41,340.00
Cukier, Wendy	1-51-53266					Jan 2012	\$7,500.00
Cukier, Wendy	1-51-53268					Dec 2011	\$7,000.00
Cukier, Wendy	1-51-53256					Jan 2012	\$7,500.00
Cukier, Wendy	1-51-53267					Jan 2012	\$7,500.00
Cukier, Wendy	1-51-53269	124481	Grants Managemen	NCE HITACS - The	01 Jul 2011	31 Mar 2012	\$8,000.00
Cukier, Wendy	1-51-51395	125201	Diversity Institute	Ryerson University	19 Sep 2011	30 Sep 2012	\$72,999.28

Report Option

Cost Center: 1-51-53142

Project To-Date (P3DT) Expense Summary Report

Monthly Expense Report

Payroll Details Report

Month: **OCT** Year: **2014**

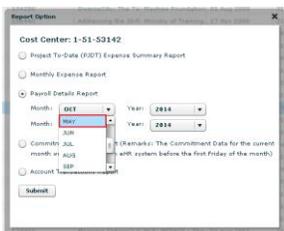
Month: **MAY** Year: **2014**

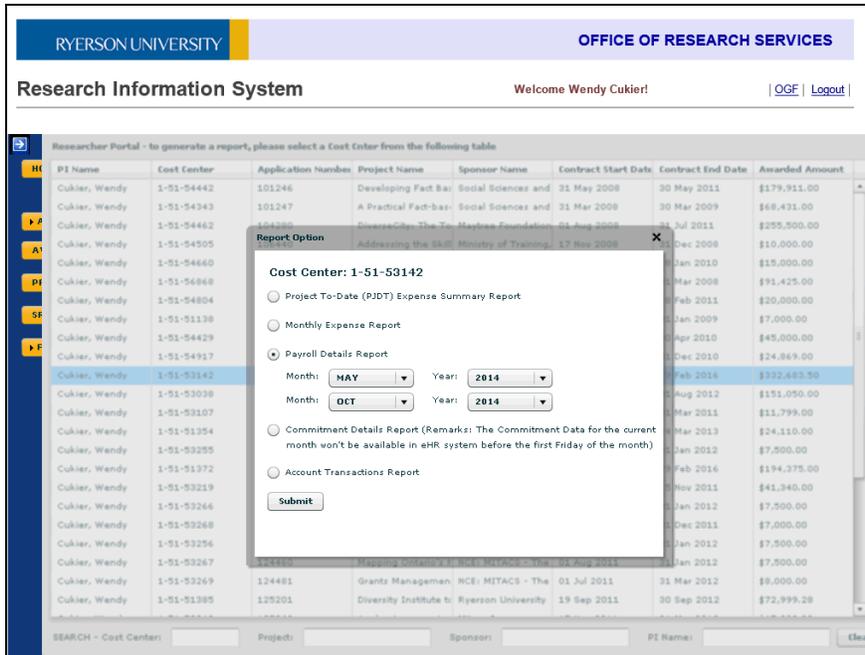
Commitment Report (Remarks: The Commitment Data for the current month will be reported in the eHR system before the first Friday of the month)

Account Transfer Report

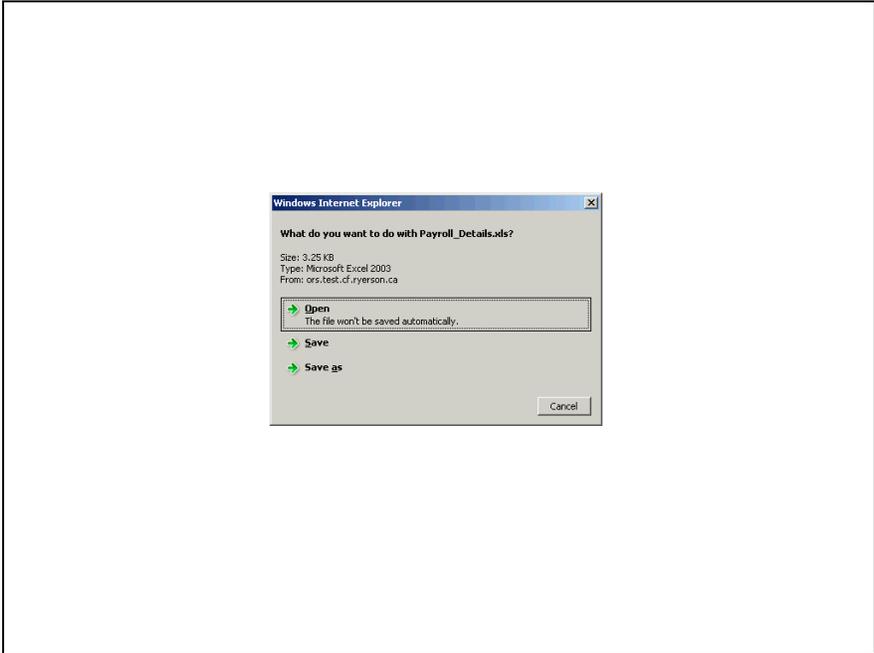
Submit

SEARCH - Cost Center: Project: Sponsor: PI Name: Clear

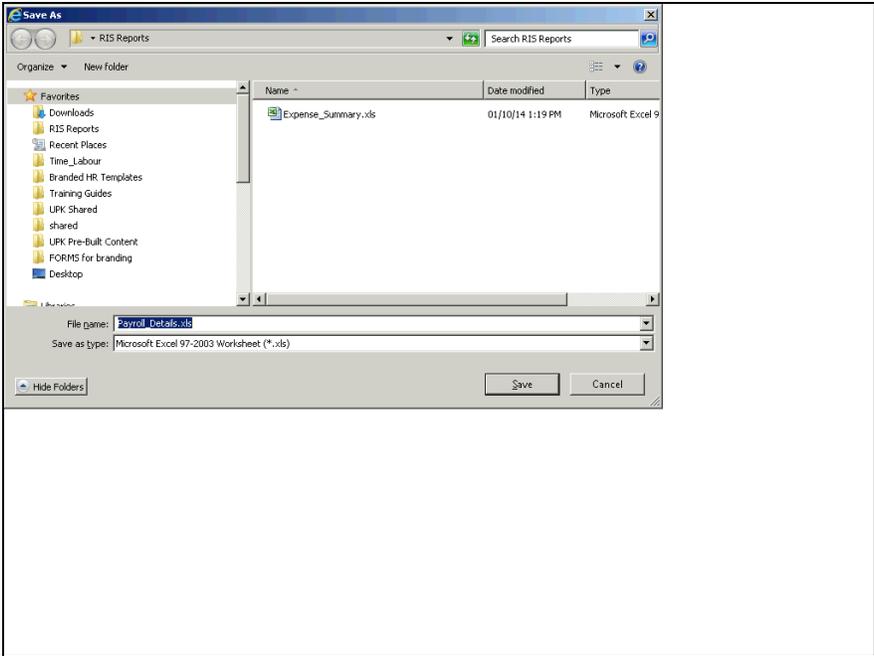
Step	Action
4.	<p>Determine the reporting period by choosing the month and year from the dropdown lists. Allows you to select a range of "from/to" dates.</p> <p>Click the MAY list item.</p> 

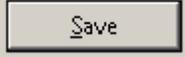


Step	Action
5.	Click the Year dropdown button to activate the menu.
6.	Click the 2014 list item.
7.	Click the Submit button.



Step	Action
17.	Your browser might prompt you with different options. Click the Save as button. <div style="background-color: #d3d3d3; padding: 5px; margin-top: 10px;">  Save as </div>



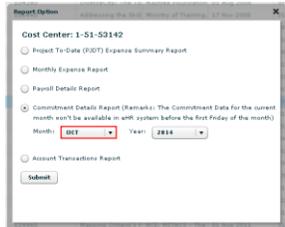
Step	Action
18.	If you wish, rename the report to something meaningful and save the report. Click the Save button. 
19.	End of simulation. End of Procedure.

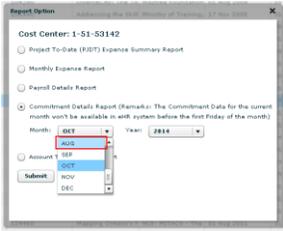
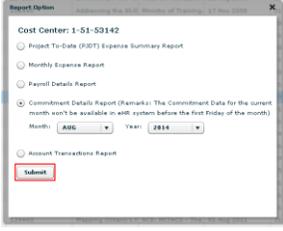
Commitment Details Report

The **Commitment Details** report lists individual employee salary and benefit expenses until the end of the employee contract or April 30th, whichever is earlier. Also, includes a list of any outstanding purchase orders, requisitions or any other project commitments to be paid upon receipt of goods.

Procedure

In this topic you will run the commitment details report and export data to Excel.

Step	Action
1.	<p>Once you have accessed the RIS portal, navigate to the cost center/project name.</p> <p>Click the Cost Center link to access reports for a specific project.</p> 
2.	<p>Click the Commitment Details Report option.</p> 
3.	<p>Note: Commitment data for the current month won't be available in eHR before the first Friday of the month.</p> <p>Determine the reporting period by choosing the month and year from the dropdown lists.</p> <p>Click the Month dropdown button to activate the menu.</p> 

Step	Action
4.	Click the AUG list item. 
5.	Click the graphic. 
6.	The commitment report details all salary and benefit expenses, and any outstanding purchase orders, requisitions or other project commitments to be paid upon receipt of goods.



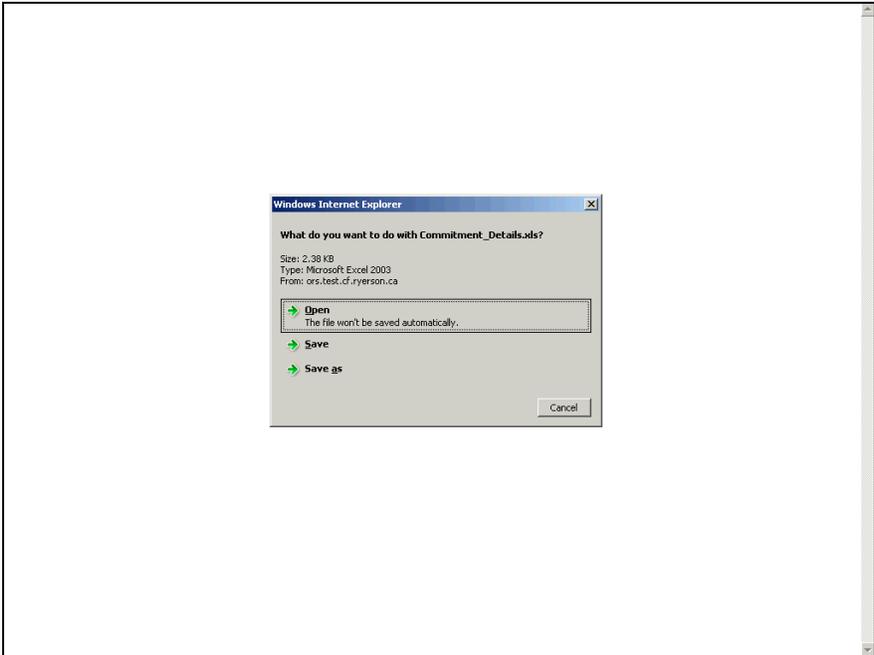
Financial Services Department
Human Resources Department
VP Research & Innovation

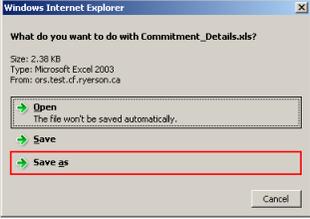
PI Report - Commitment Details Report - AUG-2014
 Cost Center: 53142 - DiversityLeadsPromoting diversity in leadership -
 PI: Cukier, Wendy

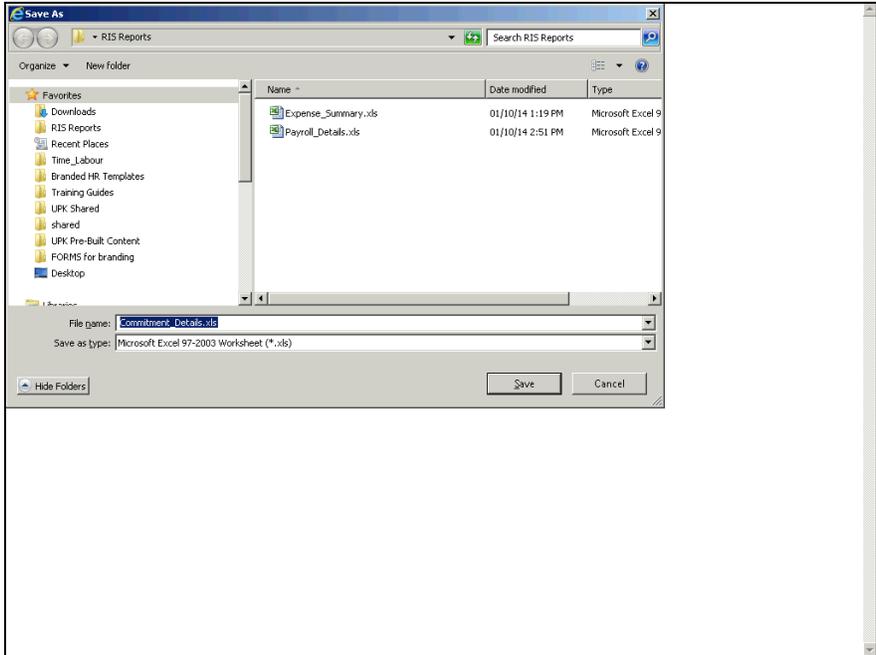
[Export to Excel file](#)

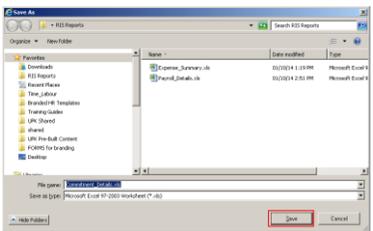
Doc Type	PO/Req#	Vendor Name	Reserved Date	Account	G/L Account Name	Item Description	Contract End Date	AMOUNT
Purchase Order	103537	Canadianweb Solutions	25 Oct 2012	8051	Software:Non Capital-\$5000	CADA Software update - Progress payment		272.90
Purchase Order	106322	Hemisphere relations publiques	19 Feb 2013	7360	ProfServices:Other	Public Relations for Montreal Report Release		278.74
Purchase Order	106559	Hemisphere relations publiques	27 Feb 2013	7360	ProfServices:Other	Public Relations for Montreal report release (final invoice)		650.40
Total Non Payroll								1,202.04
Total Outstanding Commitment								1,202.04

Step	Action
7.	To view the data in Excel, click the Export to Excel file button. 



Step	Action
8.	<p>Your browser might prompt you with different options. Click the Save as button.</p> 



Step	Action
9.	<p>If you wish, rename the report to something meaningful and save the report. Click the Save button.</p> 
10.	<p>End of simulation. End of Procedure.</p>

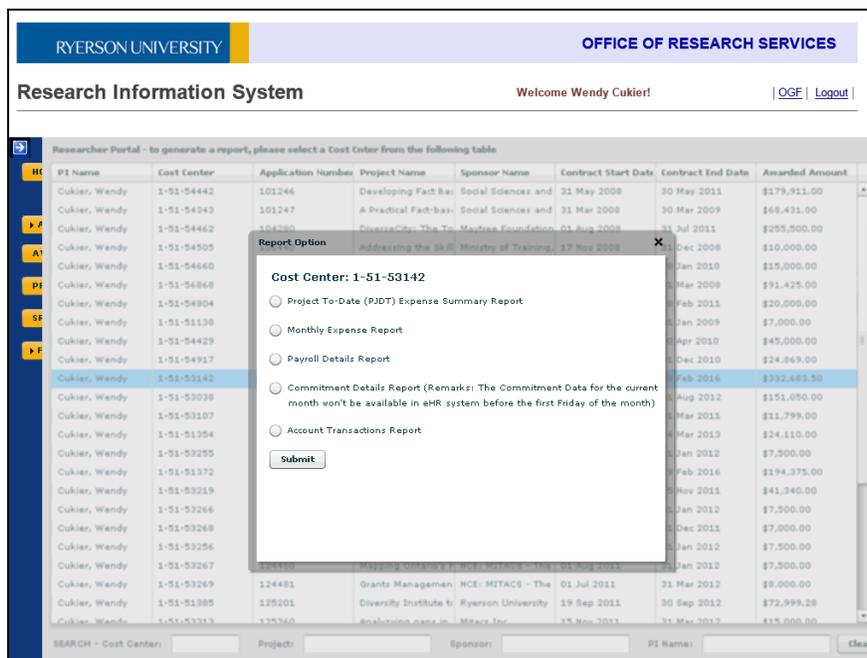
Account Transaction Report

The **Account Transaction** report provides summary of expense transactions by month for the time period selected. Includes Project to Date Summary.

Procedure

In this topic you will run the account transaction report and export data to Excel.

Step	Action
1.	<p>Once you have accessed the RIS portal, navigate to the cost center/project name.</p> <p>Click the Cost Center link to access reports for a specific project.</p> 



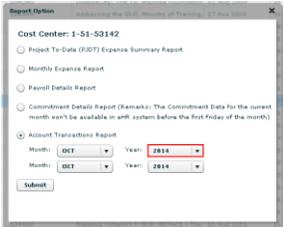
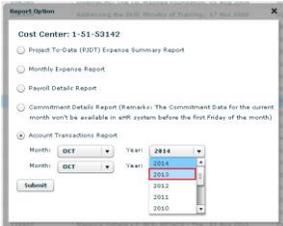
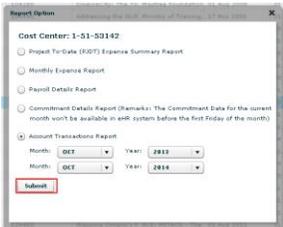
The screenshot shows the Research Information System interface. At the top, it says "RYERSON UNIVERSITY" and "OFFICE OF RESEARCH SERVICES". Below that, it says "Research Information System" and "Welcome Wendy Cukier!". There are links for "OGF" and "Logout".

The main content area shows a table titled "Researcher Portal - to generate a report, please select a Cost Center from the following table". The table has columns: PI Name, Cost Center, Application Number, Project Name, Sponsor Name, Contract Start Date, Contract End Date, and Awarded Amount. The row for Cost Center 1-51-53142 is highlighted in blue.

A "Report Option" dialog box is open over the table. It has a title "Report Option" and a close button (X). The dialog box contains the following options:

- Project To-Date (PJDT) Expense Summary Report
- Monthly Expense Report
- Payroll Details Report
- Commitment Details Report (Remarks: The Commitment Data for the current month won't be available in eHR system before the first Friday of the month)
- Account Transactions Report

At the bottom of the dialog box, there is a "Submit" button.

Step	Action
2.	<p>Click the Account Transactions Report option.</p> 
3.	<p>Determine the reporting period by choosing the month and year from the dropdown lists. Allows you to select a range of "from/to" dates.</p> <p>Click the Year dropdown button to activate the menu.</p> 
4.	<p>Click the Year list item.</p> 
5.	<p>Click the Submit button.</p> 
6.	<p>The report details expense transactions by month for the time period selected. Includes Project to Date Summary.</p>

Financial Services Department
 Human Resources Department
 VP Research & Innovation

PI Report - Account Transactions Report - as at end of Oct 2014
 Cost Center: 53142 - Diversity/Leads/Promoting diversity in leadership -...
 PI: Cukier, Wendy
 Oct 2013 - Oct 2014

[Export to Excel file](#)

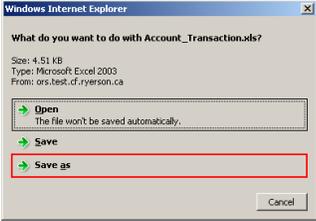
PERIOD	POSTED DATE	DESCRIPTION	DEBIT	CREDIT
Oct-13	11 Oct 2013	Cukier, Wendy	1,737.02	0.00
	31 Oct 2013	Cornely,Krysten *#1500455763	265.85	0.00
Nov-13	06 Nov 2013	CashReceipts	27.00	0.00
	23 Nov 2013	10191-Sep/13PremierGlobalConf-(was P1noo)now-J.Olsen	37.57	0.00
Dec-13	05 Dec 2013	Roach, Erin	373.19	0.00
	20 Dec 2013	Cornely,Krysten *#1500455763	429.73	265.85
Jan-14	10 Jan 2014	Jackson, Samantha	743.27	0.00

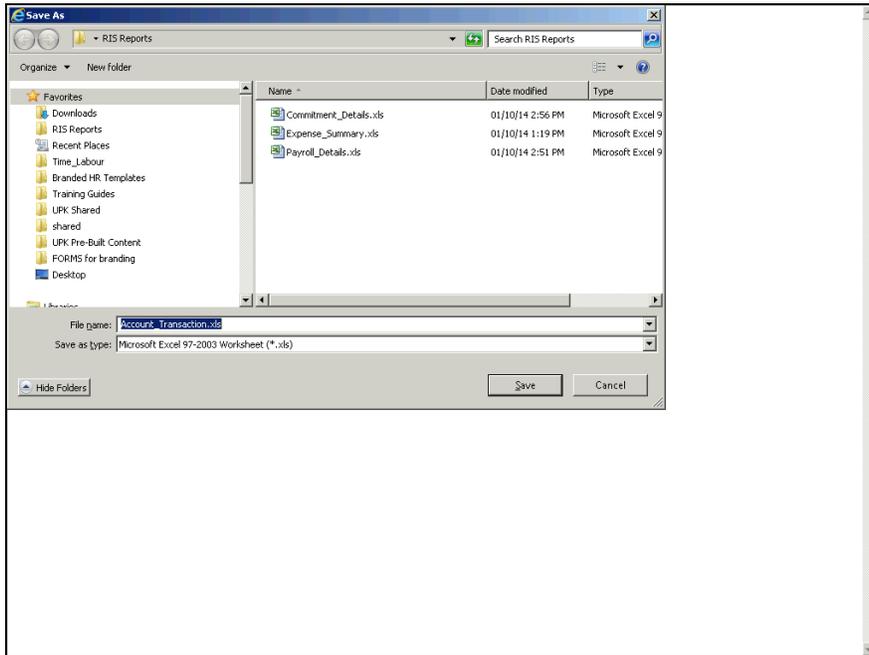
Project-To-Date Summary

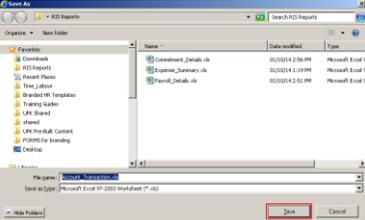
BUDGET	(+)	799,027.00
ENCUMBRANCE		
* Materials, Supplies & Other Expenses	(-)	272.90
* Professional Services	(-)	929.14
* Salary	(-)	43,672.26
Funds Available		754,152.70

Step	Action
7.	Click the Export to Excel file button. <div style="border: 2px solid red; padding: 5px; width: fit-content; margin: 5px auto;">Export to Excel file</div>

The screenshot shows a Windows Internet Explorer window with a download dialog box open. The dialog asks 'What do you want to do with Account_Transaction.xls?' and provides options: 'Open' (with a note 'The file won't be saved automatically.'), 'Save', and 'Save as'. A 'Cancel' button is also visible at the bottom right of the dialog.

Step	Action
8.	<p>Your browser might prompt you with different options. Click the Save as button.</p> 



Step	Action
9.	<p>If you wish, rename the report to something meaningful and save the report. Click the Save button.</p> 
10.	<p>End of simulation. End of Procedure.</p>

Troubleshooting

1. I can't see the one or many of my cost centers for a faculty in the Project To-Date Report, who do I need to contact?

Access to cost centres and the data for each report is determined by your eligibility to have access to confidential data. See the "Client Services - Research Accounting" contact list.

2. What should I do if I cannot use my mobile device and need to access the application to complete work related tasks?

Use the Show/Generate Backup Codes button to generate backup codes in the event you are not able to access your mobile device for any reason. These are one-time use, randomly generated codes.