

Memorandum

To: CUNY Principal Investigators and CUNY Grants Officers
From: The Research Foundation of the City University of New York
Subject: Web Report Transition to OneRF (Workday)
Date: March 18, 2026

The Research Foundation of the City University of New York (RFCUNY) is sending this memorandum to notify principal investigators and grants officers regarding the reporting capabilities available in OneRF. This memorandum also includes instructions for adding dashboards to the OneRF workspace.

Executive Summary

Reports and reporting are central to the grants administration work, and in the design of OneRF, the RFCUNY team worked with our implementation consultants to analyze the reporting capabilities of the system and build the reports that are needed by Grants Officers and PIs. In the weeks leading up to the launch of OneRF, it was essential that RFCUNY focus first on the full implementation and data migration. Since then, we have been working to make available a set of reports that address the top needs of staff, Grants Officers, and Principal Investigators.

This document provides an outline of the current reporting functionality in OneRF and our initial set of plans moving forward. We have sought to recreate as many of the reports available to Grants Officers, Principal Investigators and Project Administrators in RFCUNY’s legacy system as possible. The reporting structure of OneRF’s Workday platform allowed RFCUNY to eliminate duplications in our legacy systems. In these cases, a single OneRF report replaces multiple legacy reports. We have also been able to launch one new report (View All My Grants for PIs). As a result, the following reports are currently live (or under development, as indicated) in OneRF.

Reports Currently Live or Under Development in OneRF:

OneRF Report:	Replaces:	Available To:
Administrative Fee by College (Cost Center) <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>Provides data on administrative fee by College and Grant</i> 	<ul style="list-style-type: none"> • Administrative Fee Report (Cumulative by Dept) • Administrative Fee Report (Cumulative) • Administrative Fee Report (Monthly by Dept) • Administrative Fee Report (Monthly) 	<ul style="list-style-type: none"> • Grants Officers
Consolidated (Award) Trial Balance Report <ul style="list-style-type: none"> • Status: <i>Live</i> • Description: <i>This report combines multiple grant trial balance reports</i> 	<ul style="list-style-type: none"> • Consolidated Project Summary (With Pending Entries) • Consolidated Project Summary (Without Pending Entries) 	<ul style="list-style-type: none"> • Grants Officers • Principal Investigators • Authorized Signatories

<p>Direct/Facilities & Administrative Cost</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>Provides data on Direct and F&A cost by College and Grant</i> 	<ul style="list-style-type: none"> • Direct/Facilities & Administrative Cost - Details 	<ul style="list-style-type: none"> • Grants Officers
<p>F&A Cost Recovery by College (Cost Center)</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>Provides data on F&A cost by College by Grant</i> 	<ul style="list-style-type: none"> • F&A Cost Recovery Report 	<ul style="list-style-type: none"> • Grants Officers
<p>Deficit Cash Balance by College</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>Provides list of Grants with deficit cash balance</i> 	<ul style="list-style-type: none"> • Deficit Cash Balance Report by College 	<ul style="list-style-type: none"> • Grants Officers
<p>Grant Cumulative Budget & Expense Report</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>identifies the budget, obligation and expense activity of a Grant for the period specified using the From and To date fields</i> 	<ul style="list-style-type: none"> • Project Cumulative Report 	<ul style="list-style-type: none"> • Grants Officers • Principal Investigators • Authorized Signatories
<p>Grants Payroll Actuals - Summary Report</p> <ul style="list-style-type: none"> • Status: <i>Live</i> • Description: <i>provides totals of payroll actual by employee</i> <p>Grants Payroll Obligations - Summary Report</p> <ul style="list-style-type: none"> • Status: <i>Live</i> • Description: <i>provides totals of payroll obligations by employee</i> 	<ul style="list-style-type: none"> • Encumbrance/Payroll by Employee 	<ul style="list-style-type: none"> • Grants Officers • Principal Investigators • Authorized Signatories
<p>Index by College (Cost Center)</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>List of Grants with attribute fields</i> 	<ul style="list-style-type: none"> • Index by College Report 	<ul style="list-style-type: none"> • Grants Officers
<p>Index by Sponsor ID (Cost Center)</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>List of Grants with sponsor id</i> 	<ul style="list-style-type: none"> • Index by Sponsor ID 	<ul style="list-style-type: none"> • Grants Officers
<p>PI Grants Pending Purchase Orders</p> <ul style="list-style-type: none"> • Status: <i>In Development</i> • Description: <i>List of PO balances by Grant</i> 	<ul style="list-style-type: none"> • Current Month OTPS Remaining Encumbrance (With Pending Entries) • Current Month OTPS Remaining Encumbrance (Without Pending Entries) 	<ul style="list-style-type: none"> • Principal Investigators • Authorized Signatories

<p>PI Project List</p> <ul style="list-style-type: none"> • Status: Live • Description: provides list of PI Grants with available balances by Personnel and OTPS 	<ul style="list-style-type: none"> • PI's Project List 	<ul style="list-style-type: none"> • Principal Investigators • Authorized Signatories
<p>RFCUNY Grant Budget & Expense Report</p> <ul style="list-style-type: none"> • Status: Live • Description: This report identifies the Grant budget, obligations and expenses for personnel and other than personnel service (OTPS) costs 	<ul style="list-style-type: none"> • Project Budget & Expense (With Pending Entries) • Project Budget & Expense (Without Pending Entries) 	<ul style="list-style-type: none"> • Grants Officers • Principal Investigators • Authorized Signatories
<p>RFCUNY Grant Trial Balance Report</p> <ul style="list-style-type: none"> • Status: Live • Description: This report adds to Grant Budget & Expense Report by including general ledger data. This report is used primarily by RF staff 	<ul style="list-style-type: none"> • Project Trial Balance (With Pending Entries) • Project Trial Balance (Without Pending Entries) 	<ul style="list-style-type: none"> • Grants Officers • Principal Investigators • Authorized Signatories
<p>Statement of Changes in Recoveries Funds</p> <ul style="list-style-type: none"> • Status: In Development • Description: Provides beginning and ending balances on recovery fund and interest accounts 	<ul style="list-style-type: none"> • Statement of Changes in Recoveries Fund (Cumulative) • Statement of Changes in Recoveries Fund (Monthly) 	<ul style="list-style-type: none"> • Grants Officers
<p>Summary of Sponsored Projects by College (Cost Center)</p> <ul style="list-style-type: none"> • Status: In Development • Description: List of Grants with fiscal data 	<ul style="list-style-type: none"> • Summary of Agency Fund Projects (Ledger 9) • Summary of Central Allocation Budget Projects (Ledger 8) • Summary of City Sponsored Projects (Ledger 5) • Summary of Federal Sponsored Projects (Ledger 4) • Summary of Private Sponsored Projects (Ledger 7) • Summary of PSCUNY Sponsored Projects (Ledger 6) • Summary of State Sponsored Projects (Ledger 5) • Summary of Sponsored Projects • College Summary by Fund Group 	<ul style="list-style-type: none"> • Grants Officers
<p>Summary of Sponsored Projects for the PI</p> <ul style="list-style-type: none"> • Status: Live • Description: provides list of Grants with total amount for Budget, Commitment, Obligation, Actual, and Available balance 	<ul style="list-style-type: none"> • Summary of Agency Fund Projects (Ledger 9) • Summary of Central Allocation Budget Projects (Ledger 8) • Summary of City Sponsored Projects (Ledger 5) • Summary of Federal Sponsored Projects (Ledger 4) • Summary of Private Sponsored Projects (Ledger 7) • Summary of PSCUNY Sponsored Projects (Ledger 6) • Summary of State Sponsored Projects (Ledger 5) • Summary of Sponsored Projects • College Summary by Fund Group 	<ul style="list-style-type: none"> • Principal Investigators • Authorized Signatories

<p>View All My Grants (New)</p> <ul style="list-style-type: none"> • Status: <i>Live</i> • Description: <i>provides list of Grants with attribute values and total budget amount</i> 	<ul style="list-style-type: none"> • New: Lists all the user's grants and their associated attributes. 	<ul style="list-style-type: none"> • Principal Investigators • Authorized Signatories
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Next Steps:

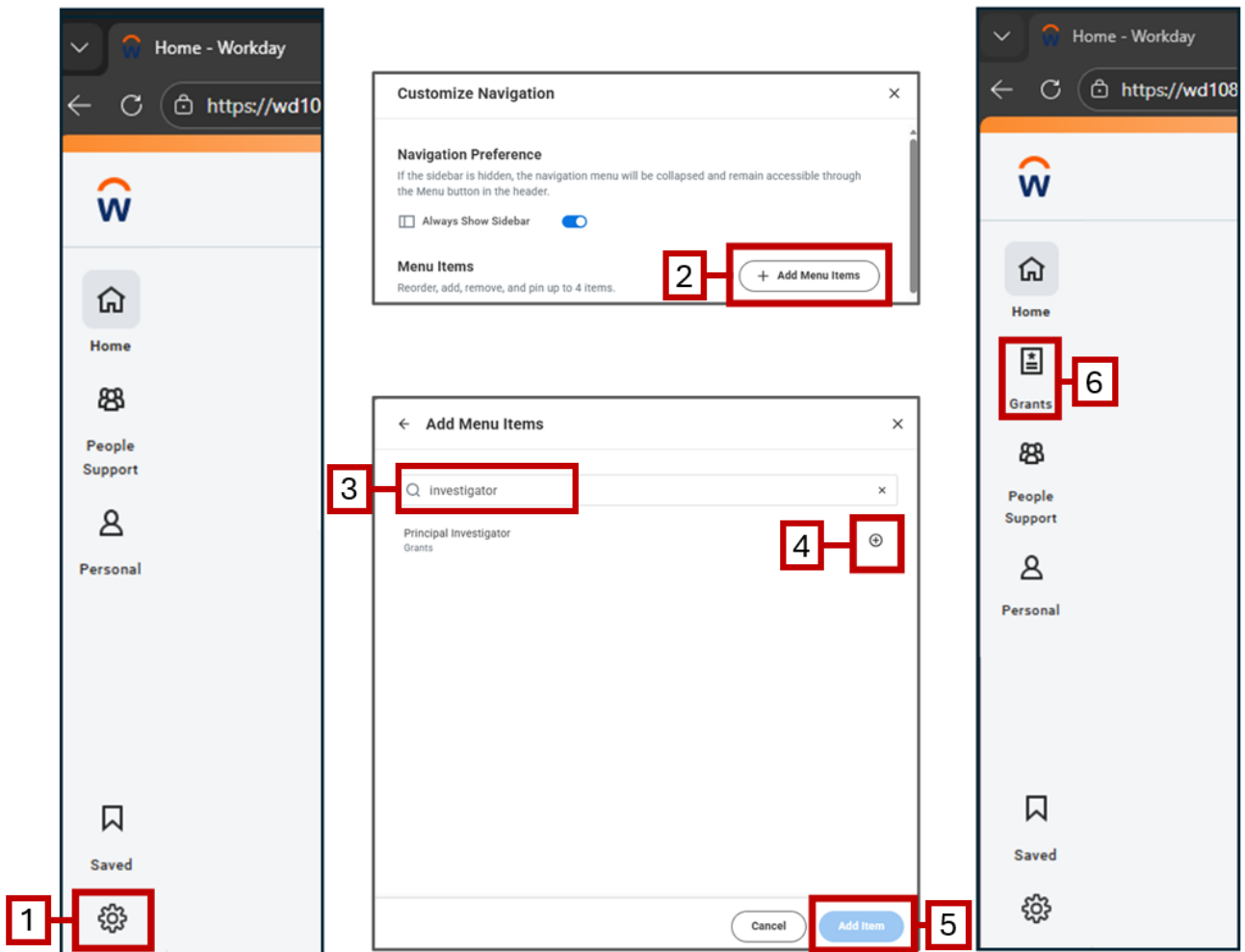
RFCUNY will continue testing the reports in development outlined above and will let the field know as soon as each of the ones in development is fully validated and ready for use. RFCUNY understands that there is significant desire for additional custom reporting.

To address this need, we will be assembling a working group of PIs, GOs, and other users and will task this group with the responsibility of identifying and recommending additional reporting capabilities that could be developed in OneRF.

Additionally, this working advisory group will address whether and how to recreate the small number of legacy reports which were either retired due to low or no usage or were unable to be recreated exactly due to the reporting structure in OneRF. We will publish an update with further information on the OneRF Information Hub as the working group evaluates and suggests additional reporting capabilities.

Adding Report Dashboards to the OneRF Menu

1. Find and click the **gear icon** on the left side panel of the OneRF home screen. The Customize Navigation dialog box will appear.
2. Within the dialog box, select **Add Menu Items**.
3. Reports are found in three different dashboards: Grant Manager, Grant Officer, or Principal Investigator. Type “grant”, “principal” or “investigator” in **the search bar** to locate your desired dashboard.
4. Click on **the plus sign** to the right of your selection.
5. Click on **Add Item** at the bottom of the window.
6. Your newly selected menus will appear on the OneRF home screen.



Note: The GO and PI dashboards also include links to RFCUNY’s website, legacy reports, and Contract Manager (GOs).