

## INSTRUCTIONS FOR RUNNING THE CCR MONTHLY EXECUTION REPORT IN SOFIE

1. Log into SOFie. You will be logging in directly through the NIH Portal. Link is <http://sofie-nci.nci.nih.gov>
2. At the Account Structure screen (main screen), verify that the FY is correct and select the appropriate view.

Fiscal Year: 2007  
Year elapsed: 27 %

Available Views: Frederick LEI

OO/PS: OO+PS

Search for Account#:  Go

[Advanced...](#) | [DocNo Search...](#)

[EXCEL Link](#) Excel Link has been established.

Show ONLY Transactions for

Last Week  Last Day

3. Expand all -
4. Click on Excel Link - - You will know that you have successfully linked when you see the words “Excel Link has been established” appear in red.
5. Check “Toggle Checkboxes”
6. Minimize SOFie.
7. Open the Excel file titled “Spending Report.xls” which should always be saved in your computer’s C Drive, Windows folder.
8. In the Excel toolbar on the top of the screen, select “SOFIE Functions”, then “Refresh Excel Link”. The data for your Lab’s Summary should populate the spreadsheet.
9. If you simply want to review the reports on the computer screen, you can select “SOFIE Functions” at the top again, then “Get Next” – the spreadsheet will then repopulate with the next CAN’s data (usually the Office of the Chief), select “Get Next” again and the repopulation continues.
10. You may also select “SOFIE Functions” and “Print All” – all the CANs for the Lab View you have selected will print.

