

# PI Portal

Rubenstein School for the Environment and Natural Resources

Principal Investigator (PI) Project Budget Information Access

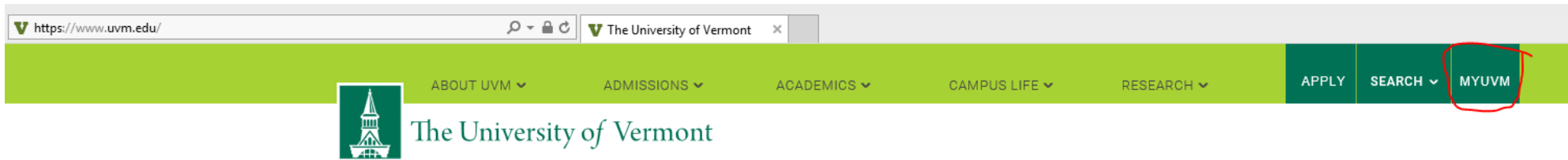
April 2019

# PI Portal Things to Keep in Mind:

- ▶ Data is refreshed nightly, so information is up-to-date
- ▶ You can view payroll expenses and encumbrances including who is being paid and for how much
- ▶ Includes cost share information and chart strings associated with projects
- ▶ Allows you to search by award or project
- ▶ “Notify” button allows you to send email directly from the system
- ▶ Search transaction detail by budget lines

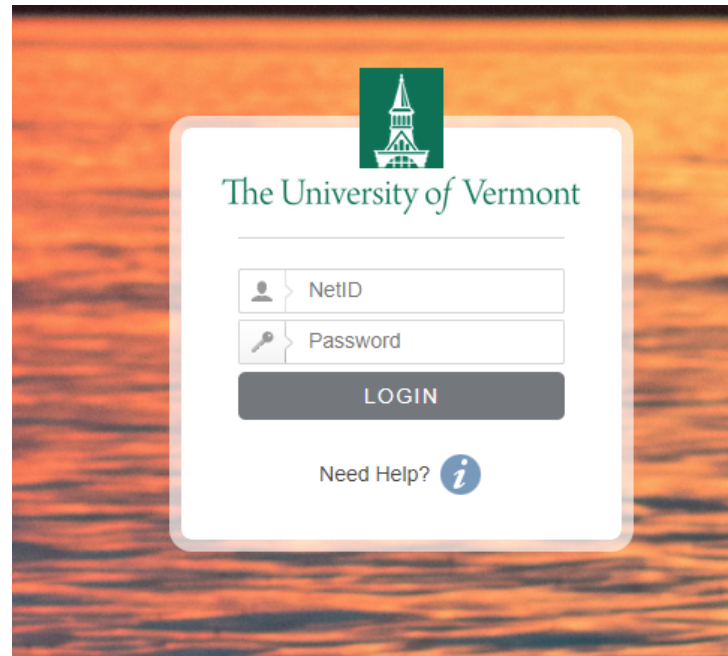
# Getting Started:

- ▶ Access the PI Portal Login from MyUVM.



# PeopleSoft DUO Login Required

- ▶ Login using your PeopleSoft using your UVM Network ID (NetID) and Password


The image shows a login interface for The University of Vermont. It features a white login box centered on a background of a sunset over water. The box contains the university's logo (a green square with a white building icon), the text "The University of Vermont", and two input fields: "NetID" with a person icon and "Password" with a key icon. Below these fields is a dark grey "LOGIN" button. At the bottom of the box, it says "Need Help?" followed by a blue information icon.

The University of Vermont

NetID

Password

LOGIN

Need Help? 

MyUVM: press the Employee Tab and under the PeopleSoft List choose “Financials”

The screenshot displays the MyUVM website interface. At the top left is the "myUVM" logo. To its right, a welcome message reads "Welcome, Debbie" and "You are currently logged in." Below this is a green navigation bar with four tabs: "Employee", "Library", "Alumni", and "Help". The "Employee" tab is highlighted with a red circle. Below the navigation bar, the page is divided into three columns. The left column contains an "Announcements" section with the text "Want to register for courses?" and an "Emergency Resources" section with a link to "Emergency Management". The middle column is titled "PeopleSoft" and contains a list of links: "Human Resources", "Financials" (highlighted with a yellow box), "PeopleSoft Classes", "PeopleSoft Email Help (Footprints)", "PeopleSoft Access Request", and "PeopleSoft User Guides". The right column is titled "Tools for Emplo" and contains a list of links: "Calendar", "Event Mana", "FAMIS", "Footprints a", "Kronos", "Listserv", and "Lynda Train".

myUVM | Welcome, Debbie  
You are currently logged in.

Employee Library Alumni Help

Announcements

Want to register for courses?

Emergency Resources

- Emergency Management

PeopleSoft

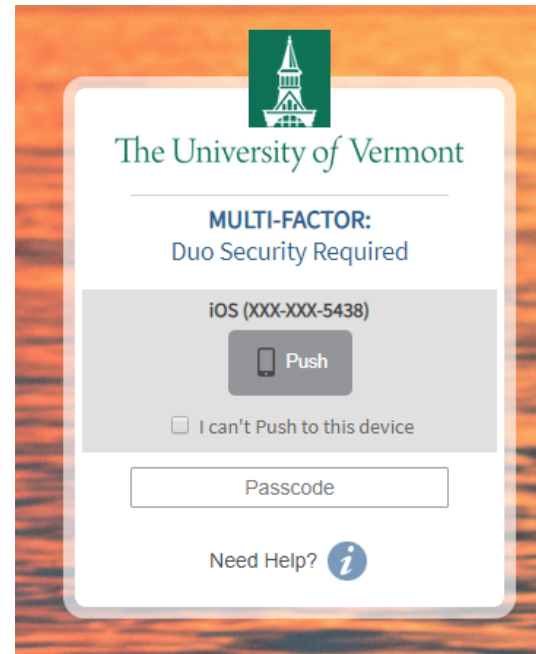
- Human Resources
- Financials
- PeopleSoft Classes
- PeopleSoft Email Help (Footprints)
- PeopleSoft Access Request
- PeopleSoft User Guides

Tools for Emplo

- Calendar
- Event Mana
- FAMIS
- Footprints a
- Kronos
- Listserv
- Lynda Train

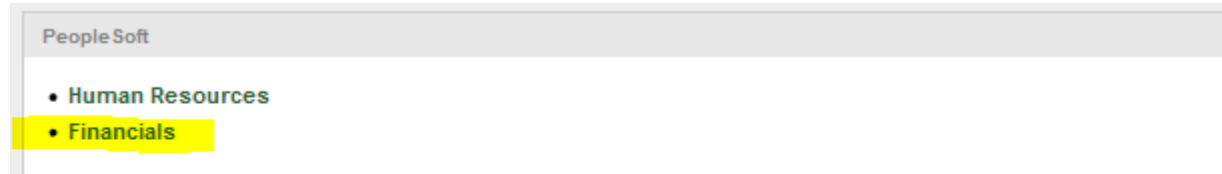
# PeopleSoft DUO Login Required

- ▶ Duo Security Required (see Seth with questions)



# Portal Login Continued

- Click Financials and you have arrived at your PI Portal landing page



**UVM Business Mgr WorkCenter**  
Welcome to the new UVM Business Manager WorkCenter for PeopleSoft Financials!  
**UVM Business Manager**

**Menu**

- My Favorites
- \* UVM Modifications
- \* UVM Reports
- \* UVM System
- Employee Self-Service
- Manager Self-Service
- Customer Contracts
- Purchasing
- eProcurement
- Grants
- Project Costing

**PI Portal**  
PI Portal: My Active Sponsored Projects & Recently Expired (for 120 days post expiration d

Project Manger	PS Project	PS Award	Title	Sponsor	Sponsor Award ID	Start Date
Hawley,Gary	<a href="#">032333</a>	000031137	Assessing the seasonal cold tolerance of the woody shoo	US Forest Service/FS/USDA	16-JV-11242316-051	06/06/2016
Hawley,Gary	<a href="#">032636</a>	000031136	Evaluating the Impacts of Ice Storms on Tree Carbon	US Forest Service/FS/USDA	16-JV-11242307-141	08/24/2016
Hawley,Gary	<a href="#">032614</a>	000031244	Creating a dendrochronology database to evaluate trends	US Forest Service/FS/USDA	16-JV-11242316-089	08/18/2016

Full Query Results

# PI/Project Manager Landing Page

PI Portal

Hyperlink

Identifiers

Time

Money

My Active Sponsored Projects & Recently Expired (for 120 days post expiration date)

Project Manger	PS Project	PS Award	Title	Sponsor	Sponsor Award ID	Start Date	End Date	Budget	Open Encumbrance thru 6/30	Expenditures to Date	Direct Remaining	F+A Remaining	Total Amount Remaining
PM Name	<a href="#">029765</a>	000028095	Sample Project	Vassar College	NSF134.A	01/01/2014	12/31/2018	461,783.00	.00	456,720.96	3,320.20	1,741.84	5,062.04
PM Name	<a href="#">032174</a>	000030468	Sample Project	US Department of the Army/DOD	W911NF-16-1-0304	05/01/2016	04/30/2019	400,000.00	.00	394,134.01	4,302.85	1,563.14	5,865.99
PM Name	<a href="#">035603</a>	000033125	Sample Project	Yale University	AA**Yale University	10/01/2018	05/31/2019	51,782.00	12,943.00	22,007.50	8,407.72	8,423.78	16,831.50



# Project Summary

- From the Landing Page, click the Project Hyperlink and the Project Summary page opens with Budget and Expenditures.

The screenshot displays the 'Project Summary' page for PS Award 000030468, titled 'Test Project'. The page is divided into several sections:

- Project Summary Header:** Includes tabs for 'Project Summary', 'Payroll Information', and 'Transaction Detail'. The 'Project Summary' tab is selected.
- Project Information:** Displays 'PS Project 032174', 'Project Mgr Catamount', 'Department Computer Science', 'Start Date 05/01/2016', 'End Date 04/30/2019', 'Cost Share? N', and 'Status ACTIVE'.
- Award Information:** Displays 'PS Award 000030468', 'Award Title Test Project', 'Sponsor US Department of the Army/DOD', 'Sponsor Award ID W911NF-16-1-0304', 'Award PI Catamount', 'F+A Base Modified Total Direct Cost', and 'F+A Rate (%) 56.00'.
- Buttons:** Includes 'Return to PI Portal/Home' and 'Go to Search Page'.
- Budget Summary / Chartstrings:** A table showing budget and expenditure data. The table has columns for 'Account', 'Description', 'Budget', 'Open Encumbrances (Thru 6/30)', 'Expenditures', and 'Remaining Amount'.

Annotations on the screenshot include:

- A red circle around the 'Project Summary' tab.
- A green box around the 'Spend at the Project Level' button.
- A green box around the 'Bill at the Award Level' button.
- A red circle around the 'Sponsored Total Direct Remaining' value of 4,302.85.
- A green circle around the 'Budget Summary / Chartstrings' section.
- A red box around the 'Budget' column header.
- A red box around the 'Open Encumbrances (Thru 6/30)' column header.
- A red box around the 'Expenditures' column header.
- A red box around the 'Remaining Amount' column header.
- A red box around the 'TOTAL DIRECT' row, highlighting the 'Remaining Amount' of 4,302.85.
- A red box around the 'TOTAL F+A' row, highlighting the 'Remaining Amount' of 1,563.14.
- A red box around the 'TOTAL' row, highlighting the 'Remaining Amount' of 5,865.99.
- A red box around the 'TOTAL DIRECT' row, highlighting the 'Budget' of 265,687.00.
- A red box around the 'TOTAL F+A' row, highlighting the 'Budget' of 134,313.00.
- A red box around the 'TOTAL' row, highlighting the 'Budget' of 400,000.00.
- A red box around the 'TOTAL DIRECT' row, highlighting the 'Expenditures' of 261,384.15.
- A red box around the 'TOTAL F+A' row, highlighting the 'Expenditures' of 132,749.86.
- A red box around the 'TOTAL' row, highlighting the 'Expenditures' of 394,134.01.
- A red box around the 'TOTAL DIRECT' row, highlighting the 'Open Encumbrances' of 0.00.
- A red box around the 'TOTAL F+A' row, highlighting the 'Open Encumbrances' of 0.00.
- A red box around the 'TOTAL' row, highlighting the 'Open Encumbrances' of 0.00.
- A red box around the 'TOTAL DIRECT' row, highlighting the 'Remaining Amount' of 4,302.85.
- A red box around the 'TOTAL F+A' row, highlighting the 'Remaining Amount' of 1,563.14.
- A red box around the 'TOTAL' row, highlighting the 'Remaining Amount' of 5,865.99.

Account	Description	Budget	Open Encumbrances (Thru 6/30)	Expenditures	Remaining Amount
1 F5990	Personnel Salary	192,141.00	0.00	178,399.19	13,741.81
2 F5990	Fringe Benefits	25,293.00	0.00	29,579.69	-4,286.69
3 F6000	Services & Other Expenses	0.00	0.00	0.00	0.00
4 F6004	Lab Research Supplies & Servic	0,964.00	0.00	159.43	9,805.57
5 F6011	Publication Costs	2,472.00	0.00	1,760.00	712.00
6 F6020	Computer Services	4,016.00	0.00	99.99	3,916.01
7 F6021	Computer Devices	0.00	0.00	9,742.36	-9,742.36
8 F6050	Domestic Travel	3,000.00	0.00	3,223.25	-223.25
9 F6052	Foreign Travel	7,701.00	0.00	16,532.24	-8,831.24
10 F6120	Consultant & Contract Services	0.00	0.00	0.00	0.00
11 F6532	Tuition & Fees	21,100.00	0.00	21,889.00	-789.00
12	TOTAL DIRECT	265,687.00	0.00	261,384.15	4,302.85
13	TOTAL F+A	134,313.00	0.00	132,749.86	1,563.14
14	TOTAL	400,000.00	0.00	394,134.01	5,865.99



# Project Summary Continued

- ▶ Refer to the Notes section below the Budget Summary/Chartstrings table for important reminders

## Notes

1. Data is refreshed nightly.
2. Source of the expenditure data is the General Ledger.
3. Keep in mind current unspent balances do not include expenses that are in progress. For example, PurCard purchases take 30-45 days before they are posted as an expenditure. Travel reimbursements are posted as a expenditure when paid.

# Payroll Information

- ▶ Click the Payroll Information Tab to view the Payroll Expenses & Distributions
- ▶ Use the Notify button to email your Research Administrator questions (i.e. distribution past project end date warnings)

The screenshot shows the 'Payroll Information' tab selected. The 'Payroll Expenses To Date' button is circled in orange. A red arrow points from a text box 'Look to see who has been charged to the Project. Do I know them? Who is Missing?' to the 'Salary Expenses To Date' table. A 'Warning' message is also visible: 'There are distributions that go beyond the end date of the project in the current fiscal year or the upcoming fiscal year.' Below this, the 'Get Payroll Distributions' button is circled in orange. A red arrow points from a text box 'Time to fix the distribution and not wait until closeout.' to the 'Payroll Distributions' table. The 'Notify' button is circled in orange, with a red arrow pointing from a text box 'Need Help, Click and send an email, that includes a hyperlink to the Project Summary Page'.

**Payroll Information**

**Payroll Expenses To Date**

Look to see who has been charged to the Project. Do I know them? Who is Missing?

**Warning**  
There are distributions that go beyond the end date of the project in the current fiscal year or the upcoming fiscal year.

**Salary Expenses To Date**

Name	Account Description	Expense Amount	Fringe Amount	Encumbered Salary Thru 6/30	Encumbered Fringe Thru 6/30
1 Person 1	Tenure-Track Tenured	27,574.59	12,030.03		
2 Person 2	Graduate Research Assistants	59,868.40	6,909.15		
3 Person 3	Staff Salary	852.94	367.62		
4 Person 4	Graduate Research Assistants	63,228.26	7,066.64		
5 Person 5	Graduate Research Assistants	26,875.00	3,206.25		

Note: Student wages, temporary wages, additional pay, including summer salary for 9-month and 10-month appointments, are not encumbered. These costs will be posted as a payroll expenditure.

**Get Payroll Distributions**

Fiscal Year 2019

**Payroll Distributions**

Name	Empl ID	Home Dept	Message	Effective Date	Distrib End Date	Percent	Function Descr
1 Person 1		54050	This distribution is past the project end date of 04/30/2019. Please correct as soon as possible.	07/01/2018	06/30/2019	100.00	Rsch-Spon
2 Person 2		54050		09/01/2018	11/30/2018	100.00	Rsch-Spon
3 Person 3		54050		07/01/2018	09/30/2018	50.00	Rsch-Spon
4 Person 4		54050		07/01/2018	09/30/2018	100.00	Rsch-Spon
5 Person 5		54050		09/01/2018	09/30/2018	100.00	Rsch-Spon
6 Person 6		54050	This distribution is past the project end date of 04/30/2019. Please correct as soon as possible.	10/01/2018	06/30/2019	50.00	Rsch-Spon
7 Person 7		54050		10/01/2018	10/31/2018	50.00	Rsch-Spon

**Notify**

Need Help, Click and send an email, that includes a hyperlink to the Project Summary Page

# Payroll Information Continued

- ▶ Refer to the Notes section below the Payroll Expenses to Date table for important reminders

Note: Student wages, temporary wages, additional pay, including summer salary for 9-month and 10-month appointments, are not encumbered. These costs will be posted as a payroll expenditure.

- ▶ Warnings appear in the “Payroll Expenses to Date” and “Get Payroll Distributions” sections.

Payroll Expenses To Date

#### Warning

There are distributions that go beyond the end date of the project in the current fiscal year or the upcoming fiscal year.

# Transaction Detail

- Click on the Transaction Detail Tab and you can find all transactions or search for particular cost items.

The screenshot shows the 'Transaction Detail' tab selected in the top navigation bar. Below the navigation bar, there is a 'Data as of Last Night' section with a 'Get Transaction Detail' button. To the right, there is a search area with 'Enter Date Range' (From Date and To Date) and a 'Budgetary Account or Account Description' field containing 'COMPUTER'. A red arrow points from a text box 'Run searches by any budget line.' to the search field. Below the search area, there is a 'Posted Transactions' section with a 'Results' tab selected. A red arrow points from a text box 'Click and send an email to your department administration - the message will contain a hyperlink to the project summary page' to a 'Notify' button. The main table displays transaction details with columns: Budget Account, Budget Account Description, Account, Account Description, Monetary Amount, Accounting Date, Transaction ID, Name, and Long Description. The table contains 7 rows of data.

Budget Account	Budget Account Description	Account	Account Description	Monetary Amount	Accounting Date	Transaction ID	Name	Long Description
1 F6020	Computer Services	60005	Computing Supplies	99,990	10/01/2016	0000262498		Office Supplies-OMNI DEV
2 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	59,990	10/02/2017	P028548-51		WWW.NEWEGG.COM-08/31/2017
3 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	22,390	10/02/2017	P028548-51		WWW.NEWEGG.COM-09/01/2017
4 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	369,980	10/02/2017	P028548-51		WWW.NEWEGG.COM-08/31/2017
5 F6021	Computer Devices	65022	Non-Cap Cmpt Hardware <\$5000	3168,000	10/02/2017	P028548-51		WWW.NEWEGG.COM-08/31/2017
6 F6021	Computer Devices	80014	IC - Hardware	2062,000	01/12/2017	0000269853		141954-E72D
7 F6021	Computer Devices	80047	IC-Computing Services Exp	4060,000	12/05/2017	0000291733		VACC Tier 3 payment-

# Search Window

## ► Multiple search options

Search Window doubles as the default PI Portal Landing Page for Staff

The screenshot shows the 'PI Portal: Sponsored Project Search' interface. A yellow box highlights the 'Sponsored Summary' link in the top left. A red box with an arrow points to the 'Project Status' section, containing the text: 'Default search is set to Active. Toggle btw Active and All projects (active, expired, closed)'. The search form includes fields for 'PS Project #', 'Project Manager (Last,First or Partial)', 'PS Award ID', 'Award PI (Last,First or Partial)', 'Department', 'College', 'Sponsor Name', and 'Sponsor Award ID (or Partial)'. To the right of these fields are date filters: 'Start Date Greater than or =' and 'End Date Less than or ='. The 'Project Status' section has two radio buttons: 'All' and 'Active and Expired up to 120 days ago', with the latter selected. A yellow box highlights the 'Retrieve Data (as of last night)' button at the bottom.

Sponsored Summary

PI Portal: Sponsored Project Search

PS Project #

Project Manager (Last,First or Partial)

PS Award ID

Award PI (Last,First or Partial)

Department

College

Sponsor Name

Sponsor Award ID (or Partial)

Start Date Greater than or =

End Date Less than or =

Project Status

☐ All

☒ Active and Expired up to 120 days ago

Retrieve Data (as of last night)



# Questions?

