

# SPONSORED PROJECT ADMINISTRATION (SPA)

PRESENTS

## PI Portal

**Your Gateway to PI Friendly Sponsored  
Project Expenditure Reports**

**Web Based  
Intuitive-Quick-Easy**

Visual Job Aid for use with the PI Portal

**Version 1/1/2023**



The University of Vermont

# PI Portal: Welcome

## Your Gateway to Friendly Sponsored Project Expenditure Reports

Specifically designed for Investigators and Research Administrators who need sponsored project fiscal information quickly and easily to answer questions such as;

- How much money do I have left to spend?
- Will I have Carryforward?
- Will I have funds available for a No Cost Extension?
- Who is being Paid from my Grant?

The concept is simple; on-line  
banking for sponsored project  
funding



10 Great Features



1. Data Refreshed Nightly
2. Project Expenditure Detail
3. Payroll Expenditure by Person
4. Payroll Distributions by Person
5. Effort Commitment by Key Personnel
6. Non-Payroll Expenditure Detail
7. Cost Sharing Detail
8. Search Engine for Transactions
9. Email Notification
10. Download Results to Excel

1

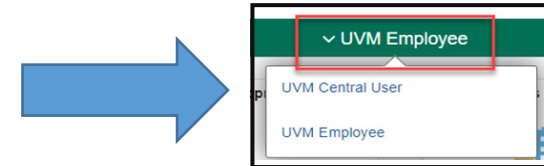
## PI Portal: Login

### PI/Project Manager Login

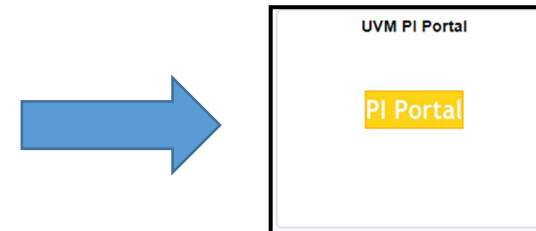
1. Click [PI Portal: Login](#)
2. Click \$ Financials
3. Login with your Net ID

or

1. Click [MyUVM](#)
2. Click PS Financials
3. Login with your Net ID
4. Select UVM Employee



5. Click PI Portal Tile



# 2

## PI Portal: Project Manager Landing Page

- Project Managers are PI eligible faculty.
- Display will include the following;
  - All Active Projects
  - Expired Projects (for 120 days post expiration date)

Hyperlink	Project and Award Identifiers							Time		Money					
Project ID	Project Manager	Project Title	Award PI	PS Award	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 Remaining
<a href="#">39118</a>	Project Manger	DMREF/Collaborative Research	Award PI	AWD00000659	DMREF/Collaborative Research: Design and Optimization o	National Science Foundation/NSF	2118810	9/1/2021	8/31/2025	401,103.00	30,835.84	128,903.98	158,821.25	82,541.93	241,363.18
<a href="#">38187</a>	Project Manger	AI Institute: Planning	Award PI	AWD00000257	AI Institute: Planning: The Proteus Institute	National Science Foundation/NSF	2020247	10/1/2020	12/31/2022	500,000.00	16,745.26	478,533.90	3,938.14	782.7	4,720.84
<a href="#">500301</a>	Project Manger	Molecular and Cellular Self	Award PI	AWD00000939	Molecular and Cellular Self Organization	Tufts University	104336-00001	1/1/2022	12/31/2022	13,632.00	0	13,390.68	221	20.32	241.32
<a href="#">35603</a>	Project Manger	GR104715 (CON-80001519)	Award PI	000033125	EFRI C3 SoRo: Programmable Skins for Moldable Robots	Yale University	GR104715 (CON-80001519)	10/1/2018	10/31/2022	496,332.00	0	496,325.78	3.69	2.53	6.22
<a href="#">37888</a>	Project Manger	REU Supplement: EFRI C3 SoRo	Award PI	000033125	EFRI C3 SoRo: Programmable Skins for Moldable Robots	Yale University	GR104715 (CON-80001519)	10/1/2018	10/31/2022	7,800.00	0	7,800.00	0	0	0
							GRID TOTALS			1,418,867.00	47,581.10	1,124,954.34	162,984.08	83,347.48	246,331.56

3

## PI Portal: Project Summary (Budget, Chartstring & Expenditures)

From the Project  
Manager Landing Page,  
Click the Project  
Hyperlink and the  
**Project Summary Page**  
Opens.

Project Summary

PS Project

500714

CIROH: Floodplains

Project Mgr

Project Manager Name

PM Home Dept

Geography & Geosciences

College

CAS

Status

ACTIVE

Cost Share? N

Start Date

08/01/2022

End Date 07/31/2023

Includes 90 Day Pre-award spending: ☐

Sponsored Total Direct Remaining

422,916.32

PS Award

AWD00001127

Award PI

PI Name

Award Title

CIROH: UVM Subproject #2: Floodplains

Award Dept

Geography & Geosciences

Sponsor

University of Alabama - Tuscaloosa

Sponsor Award ID

A22-0305-S001

Prime Sponsor

National Oceanic Atmospheric Admin/NOAA

Prime Award ID

NA22NWS4320003

F+A Rate (%)

56.00

F+A Base

Modified Total Direct Cost

Contract Type

Cost Reimbursement

Award Purpose

RESEARCH - Basic

Award Demographics

Billing Occurs at the Award Level

Go to Search Page

Budget Summary / Chartstrings

Download Results to Excel

First 1-15 of 15 Last

Budget Summary

Chartstrings



4

## PI Portal: Payroll Information

Click on the Payroll Information Tab and the **Payroll Expenses & Distributions** Page Opens.

Project Summary **Payroll Information** Transaction Detail Financial Documents Personnel Commitments

Project 500714 Project Start Date 08/01/2022 End Date 07/31/2023

**Payroll Information**

**Payroll Expenses To Date**

Review to ensure the correct people are being charged to the Project. Who is missing? Make corrections where needed.

**Salary Expenses To Date** Find | Download Results to Excel 1-3 of 3 Last

Name	Account Description	Expense Amount	Fringe Amount	Encumbered Salary Thru 6/30	Encumbered Fringe Thru 6/30
1 Person 1	Research Faculty	3,262.30	1,533.28		
2 Person 2	Graduate Research Assistants	6,337.26	468.96	14,762.64	1,092.44
3 Person 3	Research Faculty	4,237.18	1,991.47	12,241.78	5,753.64

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 From 2023 Fiscal Year To 2023 Empl ID

**Payroll Distributions** Find | Download Results to Excel First 1-11 of 11 Last

Name	Empl ID	Empl Rcd Nbr	Fiscal Year	Home Dept	Message	Effective Date	Distrib End Date	Percent	Function Description
1 Person 1	0140573	1	2023	52160	This distribution is past the project end date of 7/31/2023. Please correct as soon as possible.	10/01/2022	10/31/2023	30.00	Rsch-Spon
2 Person 2	0140573	1	2023	52160		11/01/2022	11/30/2022	30.00	Rsch-Spon
3 Person 3	0150261	1	2023	54030		09/01/2022	06/30/2023	100.00	Rsch-Spon
4 Person 4	0120102	4	2023	54030		10/01/2022	10/31/2022	18.70	Rsch-Spon

Warning: There are distributions that go beyond the end date of the project, please correct.

Time to fix Distributions and Not wait for closeout

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

Notify

5

## PI Portal: Transaction Detail

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

Project Summary | Payroll Information | **Transaction Detail** | Financial Documents | Personnel Commitments

### Transaction Detail

Project 500714      Project Start Date 08/01/2022      End Date 07/31/2023

\*Data as of Last Night

**Get Transaction Detail**      Enter Date Range      From Date  To Date

**Budgetary Account or Account Description**  
TUITION & FEES

**Run Searches by Budget Line Items and People**

**Results**

Posted Transactions	Find	Download Results to Excel	First	1 of 1	Last																				
<table border="1"> <thead> <tr> <th>Transactions</th> <th>Chartfields</th> </tr> <tr> <th>Budget Account</th> <th>Budget Account Descr</th> <th>Account</th> <th>Account Description</th> <th>Monetary Amount</th> <th>Accounting Date</th> <th>Transaction ID</th> <th>Name</th> <th>Long Description</th> </tr> </thead> <tr> <td>1 F6532</td> <td>Tuition &amp; Fees</td> <td>65321</td> <td>Tuition &amp; Fees Expense</td> <td>6147.000</td> <td>11/08/2022</td> <td>XBN0403911</td> <td></td> <td>440M Payment-Grant Project 500-</td> </tr> </table>	Transactions	Chartfields	Budget Account	Budget Account Descr	Account	Account Description	Monetary Amount	Accounting Date	Transaction ID	Name	Long Description	1 F6532	Tuition & Fees	65321	Tuition & Fees Expense	6147.000	11/08/2022	XBN0403911		440M Payment-Grant Project 500-					
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1 F6532	Tuition & Fees	65321	Tuition & Fees Expense	6147.000	11/08/2022	XBN0403911		440M Payment-Grant Project 500-																	

**Get Payroll Transaction Details (By Name/Dates)**      Enter Date Range      From Date  To Date

**Account Description or Name (Partial OK)**  
Person 1

**Results**

Payroll Actuals by Person	Find	Download Results to Excel	First	1-4 of 4	Last																																										
<table border="1"> <thead> <tr> <th>Expenses</th> <th>Chartfields</th> </tr> <tr> <th>Name</th> <th>Journal ID</th> <th>Journal Date</th> <th>Empl ID</th> <th>Account</th> <th>Account Description</th> <th>Expense Amount</th> <th>Function Description</th> </tr> </thead> <tr> <td>1 Person 1</td> <td>PAY0405383</td> <td>11/30/2022</td> <td></td> <td>50300</td> <td>Research Faculty</td> <td>1541.910</td> <td>Rsch-Spon</td> </tr> <tr> <td>2 Person 1</td> <td>PAY0404302</td> <td>11/15/2022</td> <td></td> <td>50300</td> <td>Research Faculty</td> <td>1541.910</td> <td>Rsch-Spon</td> </tr> <tr> <td>3 Person 1</td> <td>PAY0403249</td> <td>10/28/2022</td> <td></td> <td>50300</td> <td>Research Faculty</td> <td>576.680</td> <td>Rsch-Spon</td> </tr> <tr> <td>4 Person 1</td> <td>PAY0402270</td> <td>10/14/2022</td> <td></td> <td>50300</td> <td>Research Faculty</td> <td>576.680</td> <td>Rsch-Spon</td> </tr> </table>	Expenses	Chartfields	Name	Journal ID	Journal Date	Empl ID	Account	Account Description	Expense Amount	Function Description	1 Person 1	PAY0405383	11/30/2022		50300	Research Faculty	1541.910	Rsch-Spon	2 Person 1	PAY0404302	11/15/2022		50300	Research Faculty	1541.910	Rsch-Spon	3 Person 1	PAY0403249	10/28/2022		50300	Research Faculty	576.680	Rsch-Spon	4 Person 1	PAY0402270	10/14/2022		50300	Research Faculty	576.680	Rsch-Spon					
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**Notify**      Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.

# 6

## PI Portal: Financial Documents

Click on the **Financial Documents Tab** and you can find reports and invoices submitted to the sponsor.

The screenshot shows the 'Financial Documents' tab selected in the top navigation bar. Below the tabs, the page title is 'Financial Reports and Invoices'. To the right of the title, the project details are: 'Project 500714', 'Project Start Date 08/01/2022', and 'End Date 07/31/2023'. Below this, there is a table with two columns: 'Description' and 'File Name'. The table contains one row: '1 Invoice 08/01/22 - 10/31/22' and 'AWD00001127\_GCAS-123405.pdf'. A red circle highlights the 'Attachments' tab and the first row of the table. A red arrow points from the first row of the table to a text box that says 'Click on the hyperlink and open the Invoice pdf document'. Another red arrow points from a 'Notify' button to a text box that says 'Need Help? Click Notify and send an email, that includes a hyperlink to the Project Summary Page.'.

Project Summary | Payroll Information | Transaction Detail | **Financial Documents** | Personnel Commitments

Financial Reports and Invoices

Project 500714      Project Start Date 08/01/2022      End Date 07/31/2023

Attachments | [icon] | First | 1 of 1 | Last

Description	File Name
1 Invoice 08/01/22 - 10/31/22	AWD00001127_GCAS-123405.pdf

Notify

Click on the hyperlink and open the Invoice pdf document

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



7

## PI Portal: Project Personnel Commitments

Click on the **Personnel Commitments Tab** and review Key Personnel and Faculty Time Commitments devoted to the Project.

Project Summary | Payroll Information | Transaction Detail | Financial Documents | **Personnel Commitments** | Print | New window | Help | Personalize

### Sponsored Project Effort Commitments

Award ID AWD00001127      Sponsor Award ID A22-0305-S001  
Project 500714      Project Start Date 08/01/2022      End Date 07/31/2023

Note: Key personnel effort reduction of 25% or more requires prior approval from the sponsor.      Effort is displayed as percentage of FTE.

Review Key Personnel Time Commitments  
Academic, Calendar, Summer Periods  
Direct Charge and Cost Shared

Emplid	Name	Empl Class	Key Personnel	Role	Start Date	End Date	Academic	Academic Cost Share	Calendar	Calendar Cost Share	Summer	Summer Cost Share
1	Person 1	12F	Y	Co-PI	08/01/2022	07/31/2023			50.00			
2	Person 2	09F	N	Faculty	08/01/2022	07/31/2023					17.00	
3	Person 3	12F	Y	Co-PI	08/01/2022	07/31/2023			30.00			

Personalize | Find | First | 1-3 of 3 | Last

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

Notify

8

## PI Portal: Search Window

Search Window doubles as the  
Landing Page for Staff

Sponsored Summary

### PI Portal: Sponsored Project Search

#### Search:

For example, search by  
the PS Award ID.  
Results will display All  
Active PS projects  
established under that  
PS Award ID

PS Project #

Project Manager (Last,First or Partial)

Start Date Greater than or =  [BT]

End Date Less than or =  [BT]

PS Award ID

Award PI (Last,First or Partial)

Project Status

☐ All

☒ Active and Expired up to 120 days ago

Department

College

Sponsor Name

Sponsor Award ID (or Partial)

Retrieve Data (as of last night)

#### Default Search is set to Active.

Toggle btw Active  
and All Projects (All =  
active, expired,  
closed)

	Project Manager	PS Award	Project ID	Project Title	Status	Award PI	Award Title	Sponsor	Sponsor Award ID
1	Dombrowski,Kirk	AWD00001247	<a href="#">500925</a>	Administrative Support Projec	ACTIVE	Dombrowski,Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
2	Dombrowski,Kirk	AWD00001247	<a href="#">500929</a>	Participant Support Costs	ACTIVE	Dombrowski,Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
3	Dombrowski,Kirk	AWD00001247	<a href="#">500930</a>	IRI Seed Grant Program	ACTIVE	Dombrowski,Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
4	Dombrowski,Kirk	AWD00001247	<a href="#">500931</a>	Advisory Board Meetings	ACTIVE	Dombrowski,Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
5	Dombrowski,Kirk	AWD00001247	<a href="#">500932</a>	Conference Support	ACTIVE	Dombrowski,Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913
6	Dombrowski,Kirk	AWD00001247	<a href="#">500938</a>	IRI Seed Grant 1: TBD	ACTIVE	Dombrowski,Kirk	Vermont Institute for Rural Partnerships (IFRP-VT)	National Inst Food Agriculture/NIFA/USDA	2023-70500-38913